Discussion Paper Series
B No. 38

Organizational Innovation and Knowledge Use Practice: Cross-Country Comparison

(Hungarian versus Slovak Business Service Sector)

Interim Report of the Hungary-Japan Joint Research Project
"Multinationals and Local Resources"

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January 2011

INSTITUTE OF ECONOMIC RESEARCH HITOTSUBASHI UNIVERSITY

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Naka 2-1, Kunitachi City, Tokyo 186-8603, JAPAN
http://www.ier.hit-u.ac.jp

Printed in Tokyo, Japan

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Acknowledgments

In this book we present the interim report of a Hungary–Japan joint research project titled “Multinationals and Local Resources” launched by the Institute of Economic Research, Hitotsubashi University, the Institute of Sociology, Hungarian Academy of Sciences (HAS), and the Institute for World Economics, HAS. The project was financially supported by a grant-in-aid for scientific research from the Ministry of Education and Sciences in Japan (No. 19402023), the Nomura Foundation for Academic Promotion, the Tokyo Maritime Kagami Memorial Foundation, and the Hungarian Academy of Sciences. The authors also thank Tomoko Habu and Jim Treadway for their assistance with the publication of this book.

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List of Abbreviations

BPO	Business Process Outsourcing
CEE	Central and Eastern European Countries
EIS	European Innovation Scoreboard
EWCS	European Working Condition Survey
HRM	Human resources management
GDP	Gross Domestic Product
GVC	Global Value Chain
ICT	Information and Communication Technology
KIS	Knowledge-Intensive Services
KIBS	Knowledge-Intensive Business Service
KIHTS	Knowledge-Intensive High-technology Services
KIMS	Knowledge-Intensive Market Services (excluding financial intermediation and high-tech services)
KIFS	Knowledge-Intensive Financial Services
KPO	Knowledge Process Outsourcing
MNCs	Multinational Corporations
NMS	New Member States
PBF	Project-Based Firm
OKIS	Other Knowledge-Intensive Services
OJT	On-the-Job Training
STSD	Socio-Technical System Design
TPS	Toyota Production System

Executive Summary

Since the last decades of the 20th Century, we have witnessed the specific growth of the service sector at the expense of manufacturing. Some scholars qualify this change as a historical shift in the structure of economic activities, and others refer to it as a 'service sector revolution.' In a rather simplistic way, the wealth of nations can be attributed to agriculture two centuries ago, to manufacturing a century ago, and to the service sector now, producing 70–80 % of GDP in developed economies. There is a noticeable variety in the share of the service sectors of the GDP within the OECD countries. For example, in the USA, the share represents 80 %, while, in South-Korea, it represents 60 %, and, in Hungary, similarly to Finland, it takes almost two thirds of the GDP. The share of the Hungarian service sector in the GDP is higher than that in both Slovakia and the Czech Republic; however, it lags behind that in the Nordic countries, the Benelux states, and some Mediterranean countries, in which tourism is a key sector in the economy.

Before presenting the main results of the cross-country comparison of the Hungarian and Slovak knowledge-intensive business services (KIBS), we briefly describe the procedure used for data collection and the timing of the field work. In the first quarter of 2008 (according to the National Register of Economic Organizations compiled by the Hungarian Central Statistical Office), 4,049 companies with 10 or more employees were registered in the field of business services, while 2,714 were registered in Slovakia (Slovak Statistical Office). To statistically represent the organizational population, 200 companies were selected from the Hungarian firm population, and 100 companies in Slovakia,

from the business service sectors based on a multi-stage stratified sampling method. Here, the basic economic activity of the firms captured by the NACE code was used as the stratification variable. This sampling method ensured equal chances to all companies belonging to the population surveyed to be selected in the sample and reflected the heterogeneity of the organizational population as well. The fieldwork took place between June and October 2009 in Hungary and between October 2008 and January 2009 in Slovakia.

Results on the establishment of firms indicate that, in both countries participating in the comparison, the so-called *de novo* firms (Martin, 2008) dominate in the KIBS sector. The overwhelming majority of firms surveyed were established following the collapse of the state-socialist political and economic system. Only a tiny minority of the firms (7 %) existed before the 1990s. In addition to this common pattern of a firm's establishment, in all other structural features, in spite of some similarities, the differences dominated in the comparison of the Hungarian and Slovak business service firms.

The domestic (national) ownership represents the largest group of the firms in both countries (H: 78 % and Sl.: 53 %). However, within the sample of Slovak business service firms, the share of foreign ownership is more than twice that in Hungary (26.8 % versus 9.5 %). Even the rate of mixed ownership is higher in Slovakia than in Hungary (H: 13.0 % versus Sl.: 21 %).

In relation with the company group membership, or company networking, we found visible differences between the two countries. Almost three times as many firms are members of a company group in Slovakia than in Hungary (Sl.: 51 % versus H: 18 %). In addition, more than

three quarters of Slovak firms are members of the international network (company group headquarters located abroad); the largest share of foreign headquarters (28.6 %) is in the USA. Hungarian business service firms, belonging to the company group, are supervised mainly by the Hungarian headquarters. In relation with the company group membership, it is noteworthy that the company group membership is an important facilitator of knowledge transfer, learning, and the development of innovation capacity in the member company. Group -especially global network- members are better performers in both product and service innovations than 'isolated firms,' according to the other international research experiences (Nielsen, 2006: 42).

Regarding the company size and organizational architecture of the firms, we may say that small firms with lean organization[i] are dominant. Concerning the size of business service firms, almost four-fifths of the Hungarian (79 %) and almost of two-thirds of the Slovak (57 %) firms are in the small category. Beside the size of the firms, we found clear differences in the other size categories of business service firms. In the medium-size (H: 17 % versus Sl.: 27 %) and, especially, in the large-size categories, a significantly higher number of Slovak (17 %) than Hungarian (5 %) firms were noted. This means that the organizational morphology of the Slovak business service sector is more balanced than the Hungarian one.

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[i] The term 'lean organization' in our research indicates the minimal hierarchical layers between managers and the rank-and-file workers or, briefly, a less hierarchical organization. This type of organization is often characterized by a 'controlled autonomy' in work, reflecting the concern of employers to balance the needs of exercising control over employees and, at the same time, encouraging their creativity (Edwards-Geary-Sisson, 2002).

In relation with the organizational architecture of the firms surveyed, we may say that, in both countries, the so-called lean organization dominates (H: 56.8 % versus Sl.: 56.6 %) the business service sector: more than every second firm has none or only one organizational layer. The share of firms with 2 or 3 hierarchical levels is slightly higher in Slovakia than in Hungary (Sl.: 38 % versus H: 30 %); similarly, the share of firms with 4 or more hierarchical levels is slightly higher in Slovakia than in Hungary (Sl.: 13 % versus H: 10 %). These differences in hierarchical levels are attributed to the differences in the size of the firms participating in the comparison.

Noticeable differences were identified in the importance of international versus internal (home) markets that we found in the two countries. The KIBS firms operating in Slovakia have more balanced market structure in comparison with Hungary. Every second (55 %) Slovak business service firm operates primarily in the domestic market; however, the Hungarian firms almost exclusively focus (95 %) on the domestic market. In other words, the Slovak KIBS sector surveyed is integrated more strongly in the global value chain (GVC): almost half of these firms offer services on the international market. In this sense, it is noteworthy that one fourth of them are present in the USA and one fifth, in the EU-15 countries, while one tenth are offering services to Asia and to Russia, Ukraine, and Kazakhstan.

In relation with the types of services, both similarities and differences are present in the KIBS sectors of both countries. Assessing the value-added content and degree of standardization of services, the high-value-added and customer tailored services are dominant in both countries at the scale of services. However, in Hungarian firms,

‘customer-tailored solutions’ in services are present at a visibly higher rate than in Slovakia (88 % versus 66 %). Comparing the value-added content of services, its share in the Slovak firms is slightly higher than in the Hungarian business service firms (71 % versus 66 %).

Results on the sources of competitiveness highlight the following patterns. Among the 11 factors assessed by the employers interviewed, the first five factors were rather similar among the firms of both countries with regard to responding to market requirements:: reliability, quality, customer orientation, flexibility and speed to respond to market requirements, experience. A noticeable difference was observed in the variety of products and services, and this was attributed to the factors shaping the firm’s competitiveness, which were visibly more important in Hungary than in Slovakia (68 % versus 30 %).

The survey results with regard to the composition of company management and the patterns of transferring business practices indicate differences in the management of firms in the two countries. The presence of foreign managers (or expatriates) was visibly higher in all business functions surveyed, especially in accounting and finance, in the Slovak business service firms than in Hungarian ones. This pattern accurately reflects the deeper integration of Slovak business service firms in the GVC.

The dominant pattern of transferring business practices from the parent company into the subsidiary firm operating in the host-country is the so-called ‘creative adaptation’ (or the hybridization of the mother and host country practices). The following differences were identified: the Hungarian business service firms have more autonomy in transferring business practices than the Slovaks (22 % versus 16 %). Similarly, the

share of firms copying (mechanically adopting) the business practices of mother company is higher in the Slovak than in the Hungarian KIBS sector (14 % versus 9 %). These patterns of transferring business practices are not surprising knowing the visibly higher share of foreign firms and foreign company group memberships in the Slovak KIBS sector.

According to international evidence in the field of Human resources management (HRM) practices, host country managers (staff members) generally have more autonomy to develop their practices.[ii] This pattern is reflected in the dominant pattern of the creative adaptation of HRM practices in both countries. However, noticeable differences were found between the two countries. For example, the share of firms autonomously developing their HRM practices was significantly (more than three times) higher in Hungary than in Slovakia, and the rate of firms mechanically copying the mother firm's HRM practice was almost three times higher in Slovak firms than in the Hungarian ones. These differences may reflect the stronger involvement of the Slovak KIBS firms in international company networking than in the Hungarian ones.

During the company survey, attention was given to the diffusion and drivers of organizational innovation. Identifying the diffusion of organizational innovation, we made a distinction between radical (structural) and incremental (procedural) organizational innovations. Strong country differences characterize the diffusion of organizational innovation. Such forms of radical/structural organizational innovation as

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[ii] Adler, P. (1999) Hybridization: Human resources management at Two Toyota Transplants, In: Liker – Fruin – Adler (eds.) *Remade in America, (Transplanting and Transforming Japanese Management Systems),* New York – Oxford: Oxford University Press, pp. 75-116.

‘project-based work,’ ‘lean organization,’ and ‘inter-disciplinary working groups’ are more widely diffused in the Slovak than in the Hungarian company practice. However, in the fields of incremental/procedural organizational innovation, the company practices are more varied. ‘Team-work,’ ‘Quality Assurance and Auditing,’ and, especially, ‘Job Rotation’ are more widely used in Slovak than in Hungarian company practices, where ‘Delegating Quality Supervision,’ ‘Benchmarking,’ and ‘Collection of Employee Suggestions’ were more popular than in the neighboring country’s firms.

In addition to the item-focused analysis of organizational innovation, the employers were asked to assess the following four larger classes of organizational innovation: a) new business practices, b) new methods of knowledge management, c) new methods of work organization, and d) new styles of external relations. The share of firms implementing new methods of work organization and new styles of external relations is similar in both countries. However, the share of firms implementing new business practices and new methods of knowledge management is higher in Slovakia than in Hungary (44 % versus 26 % and 33 % versus 18 %, respectively).

In the context of the current economic slowdown following 2008, we were especially interested in knowing more about the diffusion of workplace innovation, which may contribute through the improved flexibility of manpower/knowledge use to the sustainable competitivity of the firms and to the better work-life balance of employees, too. In this relation, the importance of such work-place innovation was assessed by the firm managers as ‘mobile work,’ ‘home-based telework,’ ‘part-time work’ and ‘flexible working time arrangement.’ These forms of workplace

innovation, without exception, are more widely implemented in the working and employment practice of the Slovak business service firms than in the Hungarian ones. In addition, it is noteworthy that these forms of workpace innovation are more widely used in both countries in the KIBS sector than in the national economy.

In contrast to previous technological changes (e.g., automation) and due to its integrative character, Information and Communication Technology (ICT) represents such 'organizational technology,' which opens for the actors of the labor process more opportunities to shape the division of labor, designing a working system (job design) and the practice of knowledge use and development. ICT can be employed in rather flexible ways in firms: from routing information processing to supporting research and development activities. In general, ICT is used more widely and in a greater variety of ways in Hungarian than in Slovak companies, both in such routine functions as 'information processing and communication' (Hungary: 69 % versus Slovakia 43 %) and in more complex and creative tasks of 'development activities' (Hungary: 45 % versus Slovakia: 28 %).

Assessing the drivers of organizational innovation, we found more similarities than differences between Hungarian and Slovak business service firms. In both countries, firms operate under continuous pressure for cost and knowledge efficiency in the context of global competition. The key drivers of the organizational innovations are as follows: improving daily efficiency of work, quality, customer service, and response to environmental changes. In relation with the factors responsible for the lack of organizational innovation, in addition to their identical character, visible differences were found in the degree of their

importance. For example, such factors as 'there was no need for it' or 'organizational innovation was introduced before 2005' were more often mentioned by the Hungarian than the Slovak managers interviewed (33 % versus 10 % or 43 % versus 12 %, respectively). This may indicate the 'higher awareness' of the need to implement organizational innovations among Slovak than Hungarians managers.[iii] Finally, it is interesting to note that 'the shortage of skilled manpower' or 'the resistance of employees or managers' -well-known complaints for the difficulties of the organizational changes in the management literature- were rarely mentioned during the company survey.

The dynamic capabilities of the firms indicate the firms' absorptive capacity to integrate and reconfigure internal and external knowledge sources to cope efficiently with the rapidly changing environment.

Regarding the internal learning capacity of the firms, we make a distinction between formal education and competence or experienced-

[iii] In this relation, it is worth noting that, according to the latest 'European innovation scoreboard 2008, Comparative analysis of innovation performance' (2009), which uses 29 indicators to measure innovation, the EU Member States were classified into the following four country groups: (1) *Innovation leaders*, with innovation performance well above that of the EU average (Sweden, Finland, Germany, Denmark, and the UK), (2) *Innovation followers*, with innovation performance below that of the innovation leaders but above the EU average (Ireland and Austria), (3) *Moderate innovators*, with innovation performance below the EU average (Cyprus, Portugal, Spain, and Italy), and (4) *Catching-up countries*, with innovation performance well below the EU average (Malta, Hungary, Slovakia, Poland, Lithuania, Romania, Latvia, and Bulgaria). All of these countries have been catching up, with the exception of Lithuania, Bulgaria, and Romania, which have been improving their performce faster. Hungary and Slovakia belong to the country group characterized by the lowest innovation activities and labeled as 'catching-up countries.' Unfortunately, even in this group, these two countries do not improve their innovation performance as fast as other countries with weak innovation capacity (e.g., Lithuania, Bulgaria, and Romania) p. 6.

based learning. In addition, the analysis addresses the importance of social skills in the companies' knowledge development practices. In both countries, such forms of experience-based learning as 'consulting with managers and employees' and on-the-job training (OJT) -source of competence- are more important than participation in formal education. In relation with competence development, we may say that 'consulting with managers/employees,' 'OJT,' and 'attending professional fairs and exposition' play a more important role in Hungarian than Slovak firms. However, 'job rotation' as a tool of competence development in the workplace is slightly more frequently used in Slovak than Hungarian company practices (Slovakia: 40 % versus Hungary: 31 %). Forms of social skill development, such as 'supporting cooperation between the organizational units,' play an equally important role in both countries (Hungary: 63 % and Slovakia: 63 %). However, 'teamwork' as a source of social skill is more widely used in Slovak (74 %) than in Hungarian (57 %) business service firms. Formal or 'standard educational schemes' play a more important role in Slovak than Hungarian company practices (Slovakia: 60 % versus Hungary: 46 %).

Slovak company practices are characterized by being more 'training-friendly' than Hungarian ones. Slovak employers provide more support for their employees to attend a variety of company training courses than Hungarian ones (e.g., company-organized courses and employee-initiated but company- or otherwise financed courses, such as through reductions in working hours.).

Employers in firms surveyed were asked to assess the importance of external knowledge sources (e.g., customers, suppliers, educational and training institutions, and consulting agencies) in the company's

knowledge-generating process. In both countries, such external actors as customers, suppliers, and consulting agencies are important knowledge sources. In addition to this common pattern, Slovak KIBS sector's firms rely more often on educational/research institutions and labor market organizations for the development of their internal knowledge sources than Hungarian business service firms.

This book is structured as follows: The section 'Foreword' reviews some features of the services sector in the changing context of the economic activities. Section 1 describes the main characteristics of the methodology of the project (e.g., sampling design and research tools). Section 2 provides a review of the architectural characteristics (i.e., consolidation, size, ownership, management structure, and business practice transfer) of the firms surveyed. In Section 3, the analysis turns to the cross-country differences of the company surveys, considering the diffusions and drivers of the organizational innovation. In Section 4, differences between the two countries in 'dynamic capabilities' or the learning and integrative abilities of the companies surveyed are discussed.[iv]

[iv] 'Dynamic capabilities relate to the enterprise's ability to sense, seize, and adapt, in order to generate and exploit internal and external enterprise-specific competences and to address the enterprise's changing environment' (Augier – Teece, 2008:1190, in: *The MEADOW Guidelines,* 2010:29.

Foreword: Historical shift in economic structure and growing importance of the services

i. Great challenges in services

Since the last decades of the 20th Century, we have witnessed an unprecedented growth of the service sector at the expense of manufacturing and agriculture. In this relation, some scholars are labeling this change a 'service sector revolution' (Chesbrough – Shphrer, 2006). In a rather simplistic way, the wealth of nations can be attributed to agriculture two centuries ago, to manufacturing a century ago, and to the service sector now, producing 70-80 % of GDP in developed economies. In contrast, the share of the service sector in the GDP in developing countries is 52 %, and that in the Central and Eastern European Post-Socialist countries ranges from 58.4 % to 62.9 %. Another noticeable feature of these changes is the rather different development dynamics in the manufacturing and the service sectors. For example, in the UK, between 1998 and 2004, the Knowledge-intensive Business Service (KIBS) sector experienced 23.6 % productivity growth accompanying a 20.2 % employment increase. On the other hand, 28.8 % productivity growth and 22.8 % employment decline were reported in the manufacturing sector (Sako, 2006: 500).

With regard to the unbundling of corporate functions relative to support activities in a firm's infrastructure and administration, globalization of the service sector is a rather new phenomenon driven by the following factors:

(1) *Globalization of the labor marke or the Great doubling* in the international labor market. After 1989, instead of 1.48 billion people, 2.93 are competing and intensifying the wage competition globally (Freeman, 2005).

(2) *General use* (due to radical cost reduction) *of the ICT* in company practices speeded up the delocalization (outsourcing/off shoring) of not only the 'primary activities' (e.g., production) in the global value chain (GVC) but also the 'support activities' in the administrative functions (Gospel – Sako, 2008: 2-4).

(3) In the emerging markets, the social and economic actors (governments) are looking for new development strategies (a new path of the economic development) aimed to improve their position in GVC in supplying higher-value-added products and services. With the help of this new policy orientation, the CEE countries, including Hungary, intend to get rid of the situation of 'locking (…) into economic activities with low-value-added/productivity growth and, thus, undermining future sustainable growth' (Kattel – Reinert – Suurnal, 2009: 2).

(4) Fast development of 'modularization' or 'networking' via various types of organizational and managerial innovations in global corporations is continuing. This process is driven by both the cost-reduction and the transformation of the firms (e.g., the focus on the core competences in both the 'primary' and the 'support' activities).[1]

Radical changes in the nature of the global labor market are regarded as a key factor for the high speed of internationalization of services. As a result of the participation of China, India, and former Soviet-bloc countries in the global labor market, today, 2.93 billion people are in competition, while only 1.46 billion workers were active in the global labor market before these historical changes. Richard B. Freeman (2005) labeled this enormous shift in the global labor market as a 'great doubling' with a far reaching impact on labor in both the developed and

[1] According to Sako (2009), in the 'modular corporation,' the labor process in practically every large corporate department can be delocalized (either by outsouring or offshoring) and driven both by cost- and knowledge efficiences, using 'using new locations with a talent pool' (p. 4.).

developing economies. The countries noted above before the collapse of the state-socialist political-economic system and before ending their economic isolations (e.g., India), the workforce in these countries rarely competed directly with those in the developed countries. One of the most important impacts of this historical change on the global labor market is increased wage competition not only in the low-level blue-collar jobs in the manufacturing sector but also in the best- and worst-paid white-collar jobs. Contrary to widespread public belief, these developing (or emerging) economies are increasing their highly skilled labor force rather fast with the future aspiration to improve their present position in the GVC of both manufacturing and services. In this regard, it is important to stress the following: even before the 2008 global financial and economic crisis, China launched various initiatives to increase the share of high-value-added products in total exports and made remarkable progress in R&D (e.g., nanotechnology; more than 750 MNCs created R&D capacity). In addition, by 2010, the number of Chinese PhD students in engineering and natural sciences will outstrip that of similar categories in the U.S.A. Finally, it is noteworthy that, besides China, Indonesia and Brazil had doubled the number of university graduates between 1980 and 1990.

ICT and modularization (or networking) of business organizations are important drivers and/or enablers of delocalization (outsourcing/off shoring) of services. The dramatic decline in the telecommunication costs, decreasing importance of the physical distance ('death of distance'), and extensive use of ICT assist in the geographical redistribution of data storage and processing (e.g., outsourcing the data processing activities of accounting and wage departments, medical diagnosis, and logistical activities). Finally, ICT facilitates the standardization of services. This is the process of 'productizing services' in the service sector. However, the infiltration of servicing is also evident in the

manufacturing sector. For example, among such globally well-known manufacturers as the American IBM or the German Siemens, the fastest growing aspect of their turnover is generated from service activities. This process is often called 'servicing products.'

In spite of the fact that the service sector covers a greater variety of activities than the manufacturing one, only 10 % of the service sector is involved in international trade, while it is more than 50 % in the case of manufacturing (UNCTAD, 2004: 97). The smaller share of the service sector in international trade may be explained by the special characteristics of its products. In the majority of cases, it is difficult to store a significant part of the service sector's product due to the fact that the production and consumption of services take place simultaneously. This feature of the service sector results in weak tradability; therefore, at the beginning of the 21st Century (2003), despite the heavy reliance on the use of ICT, services represented only 1.8 billion USD in the work trade, in contrast to the 7.4 billion USD share of the manufacturing sector (WTO, 2005). Despite these difficulties, the share of Foreign Direct Investments (FDI) in the service activities increased in the last decades of the 20th Century. For example, in the 1970s, the sector represented only 25 % of the total inward FDI; in 2002, this share increased to 60 % (UNCTAD, 2004). The role of FDI is especially important in the field of business services (e.g., in such sub-sectors as transportation, telecommunications, real estate, catering, and hotels).

Governments in the emerging markets are designing new development (modernization) strategies aimed at moving up on the GVC and shifting from the 'low-skill' to the 'high-skill' equilibrium growth model in the CEE countries. The following table accurately illustrates the possible steps of moving up in the GVC in the field of business service activities.

Table 1. Moving of the value chain of business services

IT Services –→	BPO→	KPO
IT infrastructure Software applications development Hosting Data entry and conversion	Call centers Horizontal back-office processes (e.g., payroll administration, accounts payable) Vertical business process (e.g., claims handling in insurance)	Research & Development Engineering design Data analytics and data mining Advanced processes in legal, medical, biotechnical, and pharmaceutical sectors

Source: Sako, 2009: 17.
Note: BPO= Business Process Outsourcing, KPO= Knowledge Process Outsourcing

It is quite probable that the radical changes in the global labor market and the impact of the global financial and economic crisis in spite of the temptation of 'economic nationalism' in some countries may result in only a temporary slowdown and stronger competition and not a reversal of the trend of delocalization of business services. In this context, the organizational innovations and the knowledge development practice in the KIBS firms are playing a key role in improving the competitiveness and moving up the GVC of business services.

ii. Heterogeneous character of services and innovation

Characterizing the service activities in general, Korczynski (2002) (cited by Flecker-Holtgrewe-Schönauer-Dunkel-Meil, 2008: 103) identifies the following basic features of services:

- 'intangibility' – the product of service work is not or is only partly of a tangible nature,
- 'perishability' – the product is 'temporary' and, thus, can not be stored,

- 'variability' – the product is not homogeneous, for it can vary according to the persons involved (for instance, through the perception of the services on the part of a customer),
- 'simultaneous production and consumption' – the product is produced and consumed in one and the same situation ('uno-actu' principle),
- 'inseparability' – the product is produced by both a service provider and a receiver (co-production).

Due to the great variety in the form and content of services, it is extremely difficult to identify and assess the innovations in the field of service activities. To overcome the problems related with the heterogeneity of service sector, Salter and Tether (2006: 9-17), instead of using a universally accepted definition of service, made a distinction among the following main clusters of services:

- Traditional services
- Systems firms
- Knowledge-intensive business service (KIBS) firms

Traditional services

According to Selter and Tether (2006: 9 -11), these types of services ' … occupy the 'top and bottom' of the knowledge economy – the best and the worst jobs in services, and the growth of services has been characterised by growing inequalities in advanced economies … Because of their nature, many services … are provided locally. This local-provisions to serve local-needs has arguably led to a form of low-quality lock-in, which Finegold-Soskice (1988: 22) identified as the 'low-skill equilibrium' – in which the majority of enterprises staffed by poorly trained managers and workers produce low quality goods and services.'

Small traditional service firms are dominating the modern economy, and the following statement is generally accepted among experts dealing with service

innovation: '… Few of these firms employ professional staff, and, therefore, they often lack the absorption capacity necessary for successful innovation' (Selter-Tether, 2006: 9). However, not only the necessary professional-technical skills as social preconditions of innovation are missing in small traditional service firms but also the necessary social skills (e.g., ability to perform teamwork, capacity to solve workplace conflicts, and communication skills).

To overcome the problems related to knowledge shortage in small traditional service firms, it is necessary to call attention to the role of the franchise and company networking in speeding up the knowledge transfer and development. The 'franchise contracts' may enlarge the available knowledge pool and speed up the diffusion of the new working practices as well as help identify the conditions of brand use, including the methods and routines of the new firm establishment. Another important facilitator of knowledge transfer is the networking or company group membership. Organizations operating as a company group member (e.g., convenience store chains) may disseminate knowledge faster and improve their innovation performance better than a single firm operating alone (Nielsen – Lundvall, 2007: 74).

According to the review of relevant company surveys, the innovation performance of the micro- and small firms is lagging behind that of medium-sized and, especially, large companies. In this relation, it is necessary to report that we have rather modest systematic knowledge on the social innovation performance of the micro- and small firms operating in the traditional service sector. An overwhelming majority of innovation research is focusing on the growth potential of the start-ups in the high-tech sectors (e.g., software development and bio-technology). Few scholars are interested in better understanding the innovation

activities of the low-tech ('technology users') small firms in the traditional service sector.

To better understand the complexity of the innovation process, since 2008, the European Innovation Scoreboard (EIS) survey has been focused on the particular social segment of firms labeled as *'neglected innovators.'* According to the EIS (2009) report, R & D is not the only method of innovating. Other methods include technology adaptation, incremental changes, imitation, and combining existing knowledge in new ways. With the possible exception of technology adoption, all of these methods require creative efforts on the part of a firm's employees and, consequently, lead to a better development of the firm's in-house innovative capabilities (EIS, 2009: 23). In comparison to a firm's in-house R & D, a higher rate of non-R&D innovators use fewer than 50 employees and operate in a low-technology service sector and '… are located in European countries with below average innovative performance' (op. cit., p. 23).

In spite of the difficulties raised above on the low innovation capacity of traditional service firms, some of them are able to create a new path of development and break with the practice of the low-cost and low-quality service ('low quality lock-in'). For such firms, the benefit margin of innovation activities could be rather high.

System firms

Previously, we insisted that many services are dominated by micro- and small firms that satisfy the needs of the local market and belong to a class of firms called 'neglected innovators.' However, 'system firms' operating in the service sector are using both high-tech and advanced organizational and managerial practices. As Selter-Tether (2006: 13) reported, 'These services include banking and insurance, super market-retailing and airlines … these industries typically involve very highly

developed division of labor, sophisticated technologies including ICT and complex organizational forms.' System firms represent two bureaucratic forms of organization. Both are characterized by varying degrees of innovation and learning capacity. Mintzberg (1979, 1983) labeled these forms of organization as a 'mechanistic' and 'professional bureaucracy.'

According to the latest survey data comparing the models of work organization in Europe, work in a 'mechanistic' bureaucracy is standardized through the use of formal job descriptions and rules imposed by management. The labor process is characterized by a higher degree of centralization and limited autonomy of employees over how to carry out their tasks and over the pace of their work. On the other hand, in the case of a 'professional' bureaucracy, centralization is lower '… and behavior is regulated and standardized through the acquisition of standardized skills and the internalization of professional norms and standards of conduct. As a result, operating procedures are rather stable and routine, in spite of the considerable autonomy in the work' (Valeyre et al., 2009: 9).

Professional service firms or knowledge-intensive business service (KIBS)

KIBS service firms are playing a key role in developing innovation and knowledge at the national, regional, and firm (or firm network) levels. This type of service is in the core interest of our analysis. According to Toivonen (2006: 5),[2] professional service firms can improve the innovation activities in the following ways:

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[2] According to Salther and Tether (2006), the fundamental characteristics of innovation activities in the knowledge-intensive and professional service firms are as follows: '(1) the role of highly skilled labor in the creation and exploitation of new solutions; (2) the importance of new organizational practices, such as the use of knowledge management systems (KM) in supporting the realization of new innovative opportunites; (3) the 'generative dance' between clients and producers as new solutions are negotiated and co-produced between different actors; (4) the

- ‘direct transfer of expert knowledge, i.e., the traditional model of consulting practice, experience sharing, and carrying experiences and ideas from one context to another,
- benchmarking, where the process of identifying and focusing on ‘good practice’ can be established through an intermediary,
- brokering, putting different sources and users in contact,
- diagnosis and problem clarification, helping users articulate and define the particular needs in innovation in such a way that external resources and opportunities can be effectively used,
- change agency, where organizational development can be undertaken with help from a neutral outside perspective.’

Beside the key role of fast development of information and communication technologies (ICT), which has tremendously improved knowledge management in general (e.g., handling, storing, and transferring information did not question the importance of the ‘proximity principle).’ In this relation, Toivonen reported the following: ‘The empirical studies made until now indicate that even though there is growing potential for the electronic delivery of graphic, numerical, and text-based information, no part of the KIBS transactions can be carried out without local presence of face-to-face contact’ (op. cit.: 9).

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key role of social networks in generating and supporting knowlegde creation and exchange through brokerage and closure; (5) the ‘*ad hoc*’ or ‘informal’ ogranizational form of most knowledge-intensive service firms.’ (Salther-Tether, 2006: 17)

iii. A brief overview on the distribution of learning/innovative organization in Europe

Before outlining the results on the organizational innovation and knowledge development practices in Hungarian and Slovak KIBS firms, a brief overview is presented on the presence of innovative-learning organizations in the European economy with special focus on Hungary and Slovakia.

The European economy is characterized by a visible variety in the forms of work organization, reflecting the various degrees of learning and innovation capacity of the firms surveyed. The findings of the 4th European Working Conditions Survey (EWCS-2005) in the EU-27 countries (Valeyre et al., 2009) indicate that almost two fifths (38 %) of the European employees surveyed are working in the 'discretionary learning organization' (innovative organization). In this class of work organization, job structure is characterized by a high level of autonomy in work, need to learn and problem-solving, task complexity, and self-assessment of quality of work. Such characteristics of work as monotony, repetitiveness, and work pace constraints are under-represented.[3] The discretionary learning forms of work organization are highly developed in such sectors of the national economies as the service sectors, mainly in financial and insurance activities (63 % of employees),

[3] The discretionary learning form of work organization is comparable to the 'operating adhocracy' models of Minztberg (1979, 1983) and has many of the common features of the 'Social-Technical System Design' (STSD) model. Nielsen (2007) makes a distinction between the traditional social-technical approach of the Tavistock Institute and the Scandinavian Social-Technical System Design (STSd): 'in the early socio-technical studies attention was mainly focused on the improvement the quality of working life at the level of work groups in the organization. In the modern socio-technical system design (STSD), the attention shifts from working group to the organizatoin as a whole. Thereby formulate a set of design rules for structure of division of labor that have positive effect on the quality of working life as well as the performance of the ogranization.' (Nielsen, 2007: 67).

business services (50 %), community, recreational, cultural, and personal services (49 %), and in the gas, electricity, and water sector (56 %). (This type of organization is used less in manufacturing; however, there is a concern with the large share of employees in the mechanical engineering sector (44 %), which is characterized by complex production processes and important research-development activities.)

Another type of organization, referred to as 'lean organization,' is typified by good learning and innovation potential.[4]. This class of work organization, which accounts for more than one fourth (26%) of the employees, is defined primarily by an overrepresentation of teamwork (autonomous or not) and job rotation (particularly multi-skilling), autonomy in quality supervision (self assessment of quality of work and quality norms), and various factors constraining the speed of work or work pace. However, autonomy in work is only slightly higher than the average and limited by the importance of work pace constraints linked to the collective nature of the work and the requirement of respecting strict quantitative production norms. Thus, this model of work organization has much in common with what is described as a 'controlled autonomy' in work, reflecting employers' contradictory concern to balance the needs of exercising control over employees while, at the same time, encouraging their creativity.

The lean production forms of work organization are most prevalent in the manufacturing industries (31 %), with small disparities in the various sectors and the construction sector, but significant numbers of employees (20 %) are in other

[4] The 'lean wave,' the lean principle have become popular since the 1990s, and 'The practical use of lean strategies includes issues of cost reductions, employee empowerment, value chain orientation, customer foucs and product innovation' (*The MEADOW Guidelines*, 2010: 26. In our use, lean organization indicates the importance of the 'employee empowerment' from the various features of the lean production. The original descripton of the lean principles or lean waves is related to the work of Womack and Jones (2003).

service sectors. Taylorist forms of work organization (or the organization of work for mass production) occur most frequently in manufacturing (28 %), especially in such mature industries as textiles, clothing, and leather (47 %) but to a much lesser degree in the mechanical, electrical, and electronic engineering industries (17 % and 19 %). These forms are generally less present in the service sectors, except in hotels and restaurants (26 %), and post and telecommunications (22 %), with a higher level than the average (16.4 %). Finally, the traditional or simple structure of work organization grouped in the fourth class is prevalent in the service sectors, mainly in transport (27 %), wholesale and retail trade (25 %), community, recreational, cultural, and personal services (22 %), and hotels and restaurants (21 %), but is also diffused, higher than the average rate (16.4 %), in the food and beverage industries (19 %). Table 2 indicates the distribution of forms or models of work organization and is a comparison of the 'old' and 'new member states' in the European Union.

The positions of Hungary and Slovakia within the EU-27 countries are rather unbalanced. For example, on the one hand, among such New Member State (NMS) countries as Hungary, Estonia, and Cyprus, the share of 'learning' or 'innovative' organization' is among the highest. However, on the other hand, the Taylorist model of mass production is near or exceeds the EU average.. The same pattern of distribution of forms of work organization is true for Slovakia. This country belongs to the country cluster in which a 'lean organization' has a higher rate than the EU average. At the same time in Slovakia, the share of Taylorist work organizations exceeds the EU average. Assessing the learning and innovative capacity of both the 'learning' and 'lean' organizations, Hungary has a slightly better position than Slovakia at the cross-country level and a higher share of learning organizations than lean organizations.

Table 2. Share of work organization models in the EU-27 countries (EWCS-2005).

Models of work organization	NMS+2	EU-15
Discretionary learning organization (post-Fordism)	**Hungary**, Estonia, and Malta	Austria, Belgium, Germany, Sweden, Denmark, Netherlands, France, Luxemburg, and Finland
Lean organization (Neo-Fordist work organization)	Estonia, Latvia, Lithuania, Czech Republic, Poland, Romania, Slovenia, **Slovakia**, and Cyprus	Belgium, Luxemburg, UK, Ireland, Spain, Denmark, Finland, Malta, Portugal, and Greece
Taylorist/Fordist work organization (mass production)	Bulgaria, Czech Republic, **Hungary**, Lithuania, Romania, **Slovakia**, Cyprus	Cyprus, Greece, Spain, Italy, and Portugal
Traditional or non-coded work organization	Bulgaria, Czech Republic, Hungary, Lithuania, Slovakia, and Cyprus	Cyprus, Ireland, Greece, UK, Portugal, and Spain

Source: Makó – Illéssy – Csizmadia (2008:1080)

Unfortunately, these aggregated country-level data do not provide information about the distribution of various forms of work organization ('learning,'

'lean,' 'Taylorist,' and 'simple' versions) by sectors within the countries surveyed. The core motif in designing and carrying out a comparative company survey in the Hungarian and Slovak KIBS sector was to overcome and map 'knowledge deficiency' in that field.

iv. Share and Changes in the KIBS Sector Employment in Europe: Special Focus on Hungary and Slovakia

Following a brief presentation of the distribution of the forms of work organization in Europe, an explanation of the position occupied by the various branches of the KIBS sector within the European employment structure is presented according to the latest statistical data (see Table 3 for details) and the development of this sector in Hungary and Slovakia in comparison with the EU-27 average over the last decade (2000-2007)

In Hungary and other post-socialist countries, the share of KIBS in employment is below the EU-27 average (33 %), and these economies are lagging considerably behind such countries as Sweden (48 %), the UK (43 %), and Finland (41 %). Among the post-socialist economies of the NMS countries, in a comparison of the knowledge-intensive (business) services (KIS or KIBS), the highest level of employment was registered in Hungary (28.2 %). When evaluating the employment shares in the sub-sectors of the KIBS (e.g., KIHTS and KIMS), visible variations were registered within this country group. In the case of the 'Knowledge-intensive High-Tech Services' (KIHTS), the Hungarian employment share is the highest (3.28 %) among the post-socialist countries, followed by the Czech Republic (3.99 %), Slovakia (2.89 %), and Slovenia (2.80 %), and the lowest in Romania (1.52 %). In the case of the 'Knowledge-intensive Market Services,' Estonia (7.03 %) and Latvia (6.17 %) occupy the first two positions, and Hungary is the third in rank (5.91 %), followed by the Czech Republic (5.86 %), Slovenia (5.64 %), Poland (5.38 %), and

Slovakia (4.95 %). Identifying the share of employment in the 'Knowledge-intensive Financial Services' (KIFS), Slovenia has a leading position (2.45 %), followed by Poland (2.38 %), Hungary (2.16 %), the Czech Republic (2.07 %), and Slovakia (2.02 %). Concerning the 'Other knowledge-intensive services' (OKIS), Lithuania has the leading position (17.78 %), and Hungary occupies the second position (16.85 %), followed by Estonia (16.83 %), Slovenia (15.38 %), and then Slovakia (14.86 %). Romania has the weakest position among the post-socialist countries.[5]

In a dynamic perspective (from 2000 to 2008), looking at the growth rates of employment in the total service sector and in both the 'knowledge-intensive' and 'less knowledge-intensive' service sectors, the following patterns were identified. As shown in Figure 1, the share and the growth rates of the total service sector were the highest in the EU-27 countries, followed by Hungary, and Slovakia has a visibly weaker position.

[5] In relation to the 'less-knowledge-intensive services,' Hungary has a higher share of employment (34.67 %) than Slovakia (31.78%). In addition, the Hungarian share of employment in this type of service (34.67 %) was higher than the EU-27 average (33.7 %) in 2007.

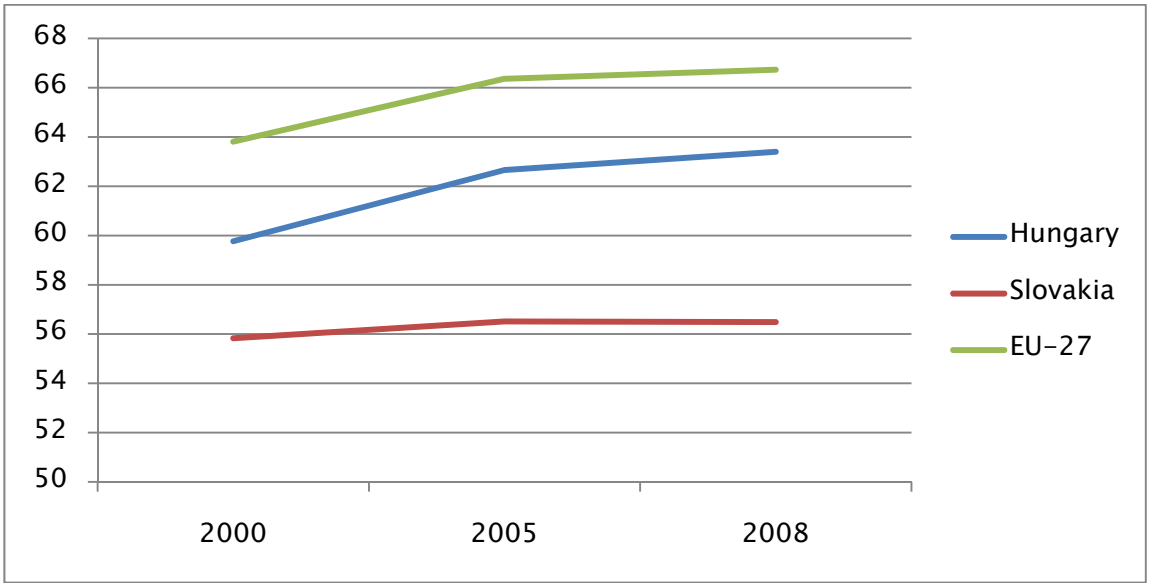
Table 3. Share of knowledge-intensive service sectors in employment in some EU countries in 2007

	Knowledge-intensive High-technology services (KIHTS) (1)	Knowledge-intensive Market services (KIMS) (2)	Knowledge-Intensive Financial Services (KIFS) (3)	Other Knowledge-intensive services (OKIS) (4)	Knowledge-intensive Services Total (KIS) Total) (1+2+3+4)
European Union (EU-27)	3.29	8.27	2.97	18.43	32.96
Bulgaria	2.54	4.46	1.35	13.31	21.66
Czech Republic	2.99	5.86	2.07	14.74	25.66
Estonia	2.55	7.03	1.43 (u)	16.83	27.84
Hungary	3.28	5.91	2.16	16.85	28.20
Latvia	2.47	6.17	1.93	14.16	24.72
Lithuania	2.10	4.64	1.45	17.78	25.97
Poland	2.57	5.38	2.38	14.49	24.81
Romania	1.52	2.70	1.04	9.15	14.40
Slovenia	2.80	5.64	2.45	15.38	26.27
Slovakia	2.89	4.95	2.02	14.87	24.74
Finland	4.56	9.92	2.01	24.24	40.73
Sweden	5.07	11.43	1.95	29.38	47.83
France	3.40	9.24	3.09	21.16	36.89
Germany	3.44	8.64	3.50	19.21	34.79
United Kingdom	4.36	10.02	4.35	24.12	42.85
Ireland	3.70	7.92	4.43	19.43	35.48
Spain	2.95	8.87	2.40	13.98	28.19
Italy	3.12	9.58	2.87	15.11	30.67

Source: Eurostat Data Explorer (http://epp.eurostat.ec.europa.eu/portal/page/portal/statistics/themes)

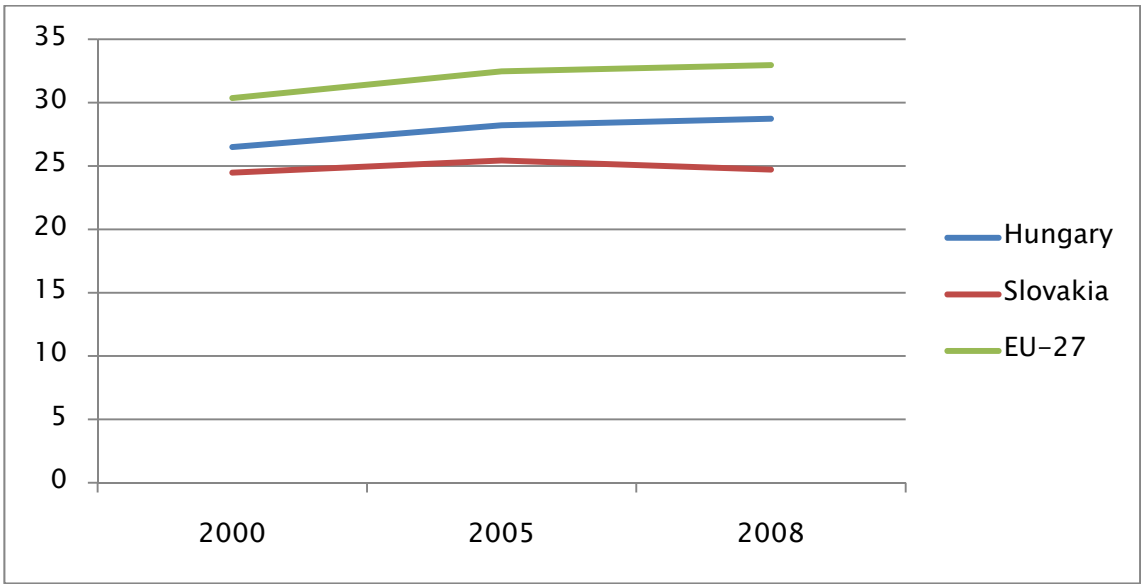
For the relevant NACE codes of each category see Appendix 1.

Figure 1. Share of Total service sector in employment in Hungary, Slovakia, and EU-27 countries, 2000-2008



Source: Eurostat Data Explorer
(http://epp.eurostat.ec.europa.eu/portal/page/portal/statistics/themes)

Figure 2. Share of Knowledge-intensive service sector in employment in Hungary, Slovakia, and the EU-27, 2000-2008

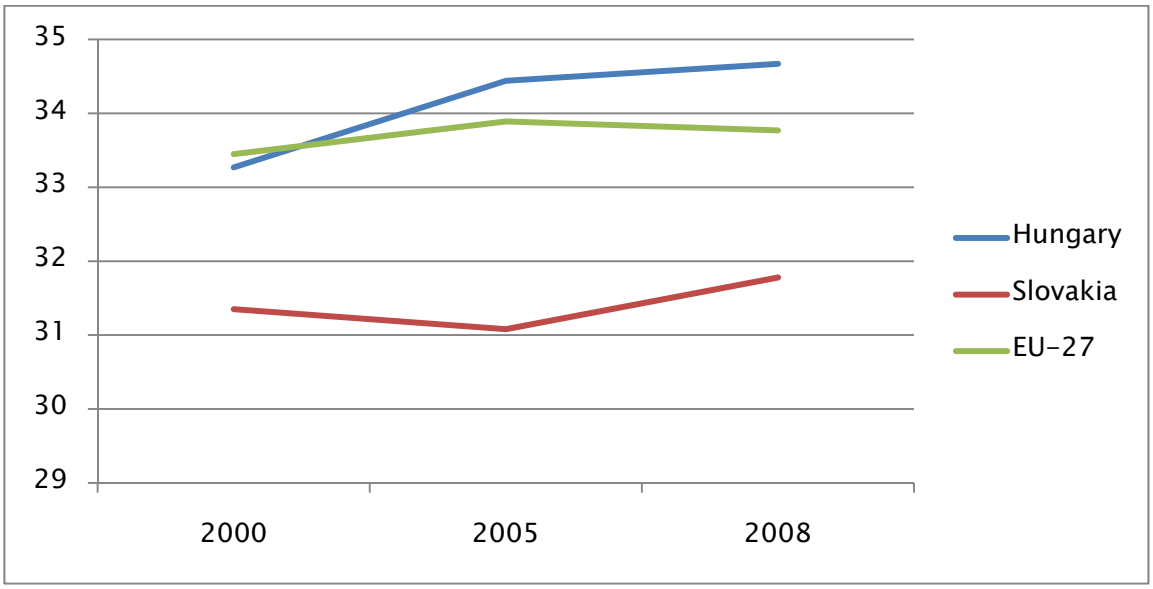


Source: Eurostat Data Explorer
(http://epp.eurostat.ec.europa.eu/portal/page/portal/statistics/themes)

In the case of the employment share and growth rate of the 'knowledge-intensive service sector,' again the EU-27 country group has the leading position, followed by Hungary and then Slovakia (see Figure 2).

In the case of the 'less-knowledge-intensive services,' from the early 2000, Hungary has been producing higher share and growth rates in employment, followed by the EU-27 country group and then Slovakia (see Figure 3).

Figure 3. Share of Less Knowledge-intensive service sector in employment in Hungary, Slovakia, and the EU-27, 2000-2008



Source: Eurostat Data Explorer
(http://epp,eurostat,ec,europa,eu/portal/page/portal/statistics/themes)

Assessment of the aggregated data of the 'total service sector,' 'knowledge-intensive service' (KIS), and 'less knowledge-intensive service' (LNIS) shows that Hungary has both a static and a dynamic perspective, which is a better position than that held by Slovakia. In addition, it is of value to map the employment share and its growth by sub-sectors of the KIS. In other words, our focus is on country

contrasts in employment share and employment growth by such sub-sectors as KIHTS, KIMS, KIFS, and LNIS. Tables 4 and 5 provide information about these differentials between the two post-socialist Central European countries in comparison to the EU-27.

Table 4. Share of Knowledge-intensive service sectors in employment in Hungary, Slovakia, and the EU: 2000-2008 (2007) (%)

Types of services	Hungary			Slovakia			EU-27 average[6]		
	2000	2005	2008	2000	2005	2008	2000	2005	2007
Knowledge-intensive high-technology services (KIHTS)	3.09	3.15	3.28	2.97	2.67	2.77	3.21	3.28	3.29
Knowledge-intensive market services (excluding financial intermediation and high-tech services) (KIMS)	4.68	5.95	6.45	3.31	4.72	5.44	6.81	7.79	8.27
Knowledge-intensive financial services (KIFS)	2.23	2.06	2.44	1.77	2.17	2.27	3.11	2.96	2.97
Other knowledge-intensive services (OKIS)	16.50	17.07	16.55	16.43	15.87	14.24	17.22	18.45	18.43
Knowledge-intensive services total	26.5	28.22	28.73	24.48	25.43	24.71	30.36	32.47	32.96
Less-knowledge-intensive services (LNIS)	33.27	34.44	34.67	31.35	31.08	31.78	33.45	33.89	33.77
Service sector total	**59.77**	**62.66**	**63.40**	**55.83**	**56.51**	**56.49**	**63.81**	**66.36**	**66.73**

Source: Eurostat Data Explorer (http://epp.eurostat.ec.europa.eu/portal/page/portal/statistics/themes)

[6] As there is no data on the EU average available for 2008, the data in the last column refer to 2007.

The share of the service sector total (KIBS + LNIS) in the two post-socialist countries was weaker than that of the EU-27 average in both 2000 and 2008 or 2007. However, there were differences. In the case of Hungary, the differences in the service sector employment share between 2000 and 2008 (or 2007) decreased (from 4.04 % in 2000 to 3.33 % in 2008 (2007)). In the case of Slovakia, the differences were more visible and increased more than the EU-27 average (form 7.98 % in 2000 to 10.24 % in 2008 (2007)).

The picture is clearly different in a comparison of the growth potential of the service sector in general and, especially, in its sub-sectors (see Table 5).

Table 5. Growth rate of overall and sub-sector service sector employment between 2000 and 2008 (2007) in Hungary, Slovakia, and the EU-27 average (%)

Types of services	Hungary (2008/2000)	Slovakia (2008/2000)	EU-27 average (2007/2000)
KIHS	+ 6.1 %	- 6.7 %	+ 2.5 %
KIMS	+ 37.8 %	+ 64.4 %	+ 21.4 %
KIFS	+ 9.4 %	+ 28.2 %	- 4.5 %
ONIS	+ 0.3 %	- 13.3 %	+ 7.0 %
KIS total	**+ 6.4 %**	**+ 0.9 %**	**+ 8.6 %**
Service total	**+ 6.1 %**	**+ 1.4 %**	**+ 1.0 %**

Source: Eurostat Data Explorer (http://epp.eurostat.ec.europa.eu/portal/page/portal/statistics/themes)

Looking at the growth rates of the overall service employment, we may say that, in both post-socialist countries, but particularly in Hungary (+6.1 %) and, to a

lesser extent, in Slovakia (+1.4 %), the growth rate between 2000 and 2008 (2007) was stronger than the EU-27 average (+ 1 %).

By evaluating the employment growth between 2000 and 2008 by sub-sectors of KIS (or KIBS) services, a more nuanced picture may be obtained. The growth rate of the overall KIS in Hungary (+ 8.4 %) was close to the EU-27 average (+ 8.6 %), but it was much weaker in Slovakia (+ 0.9 %). The employment growth in the KIHS was higher in Hungary (+ 6.1 %) than the EU-27 average (+ 2.5 %) and declined in Slovakia (- 6.7 %). In the KIMS, the employment growth rates in Hungary (+ 37.8 %) and, especially, in Slovakia (+64.4 %) were higher than the EU-27 average (+ 21.4 %). Similarly, the employment growth rates in the KIFS, in Hungary (+9.4 %), and, again, especially, in Slovakia (+ 28.2 %) were significant, while, in the EU-27 (- 4.5 %), there was a reduction in employment. In the case of the ONIS, the employment growth rate was stronger in the EU-27 countries (+ 7.0 %) and very weak in Hungary (+ 0.3 %), and a significant decline was observed in Slovakia (-13.3 %).

Similarly to the international trend, the economic performance of the service sector increased significantly in the last decade in Hungary and Slovakia. In 2007, as Table 6 indicates, almost two-thirds of the GDP was generated by the service sector in both countries. These findings bolster the previous analysis on the importance of the service sector in both countries.

In addition, it is noteworthy that, in the case of Hungary, between 1992 and 2006, the productivity growth in the service sector (measured by the share of the gross value added/capital) was higher than that in manufacturing. In addition, the service sector played a crucial role in employment generation. Between 1995 and 2006, every second new job (46 %) was created in the service sector, and,

interestingly enough, more than every second new job (57 %) was established in the knowledge-intensive business services (KIBS)[7] (ERM Report, 2008).

The improvement of economic performance was rather unequal in the very heterogeneous service sector. For example, such firm level performance indicators as gross value-added per capita, turnover, export, profitability, and employment growth were higher than the average in the KIBS (Hamar, 2005) in comparison to the traditional and system firms.

Table 6. Contributions of economic sectors in the GDP: comparing some CEE economies to various groups of EU countries (1995-2005) (%)

Country	1995			2000			2007		
	Agriculture	Industry	Service	Agriculture	Industry	Service	Agriculture	Industry	Service
EU-27	8.4	28.6	63.0	7.1	26.9	66.0	5.8	24.9	69.2
EU-15	5.0	27.5	67.5	4.2	25.8	70.1	3.4	23.5	73.1
Czech Republic	6.4	40.5	53.1	4.8	39.1	56.0	3.5	38.1	58.4
Hungary	8.2	33.1	58.7	6.6	33.8	59.6	4.7	32.5	62.8
Poland	26.9	29.7	43.5	27.5	26.3	46.2	n.d.	n.d.	n.d.
Slovakia	9.3	37.1	53.9	5.7	34.8	59.4	3.6	34.3	62.1

Source: EUROSTAT 2008, Labor Force Survey (LFS).

Note: n.d. = no data

Now, we turn to the analyses of the empirical data collected during the company surveys in the Hungarian (2008) and Slovak (2008-2009) KIBS sectors on the diffusion of organizational innovations and the knowledge-development practices.

[7] The composition of the KIBS is presented in detail in Section 1.2.

The remainder of this report is structured as follows. Section 1 reviews the research design, sampling, and research methods. Section 2 compares the structural (demographic, ownership, and market) characteristics of the firms and the composition of management. Section 3 is a discussion of the empirical results of the drivers and diffusion of organizational innovation. Section 4 is a comparison of company practice of knowledge development in both countries.

1. Research design, sampling, and research method

1.1. Need to better understand innovation in the KIBS sector

In relation with the innovation performance of the economy, we have an abundance of knowledge on technologically related product and process innovation, especially, in the manufacturing sector (Schienstock – Hamalainen, 2001). From the 1980s, renewed interest has been registered to better understand, from both the theoretical and empirical perspectives, the complex, dynamic, and multi-level relationship between organizational development and innovation, especially in the KIBS sector (Salter – Tether, 2006; Lam, 2005). In this context, it is necessary to call attention to the similarities and differences of organizational innovation and patterns of knowledge use between the KIBS and manufacturing firms. The literature dealing with service sector innovation can be classified into two contrasting schools of thinking: the first theoretical strand stresses the particular character of the innovation in the service sector (e.g., the key role of organizational development, extensive use of external knowledge source, higher priority of training, collective practice of knowledge development, interactive working practices, client-specific specialization, and generalization of consultative way of working) in comparison with the manufacturing sector (Leiponen, 2004, 2003; Salter – Tether, 2006; Toivonen, 2006). The second approach emphasizes the similarity of innovation in the service and manufacturing sectors and refuses black-and-white views (Pavitt, 1984; Evangelista, 2000; Evangelista – Savona, 2003; Miozzo – Soete, 2001) on the sector's character of innovation.

In the Hungarian academic community, there is a scarcity of systematic research on organizational innovation in general and, especially, with regard to the KIBS sector. To overcome this knowledge deficiency, the Research Group of

Sociology of Organization and Work at the Institute of Sociology Hungarian Academy of Sciences (Budapest) recently initiated desk-top screening of literature on the diffusion of organizational innovation and gathered empirical materials learned from its strong involvement in several EU-funded projects.[8]

This paper provides the first analysis of systematically collected company-level data with the objective of better understanding the diffusion and drivers of organizational innovation and the practice of knowledge development by comparing the KIBS sectors in Hungary (2008) and Slovakia (2008-2009). The company surveys were co-financed by the Ministry of Education of Japan (Grant No. 19402023), the Nomura Research Fund and the Tokyo Maritime Research Fund, and the Hungarian Academy of Sciences. The international research consortium included the following institutes: the Institute of Sociology of the Hungarian Academy of Sciences (HAS) (Budapest), the Institute for the World Economics, HAS (Budapest), the Institute of Economics of Hitotsubashi University (Tokyo), and Comenius University – Faculty of Management (Bratislava).[9]

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[8] In this respect, it is worth mentioning our involvement in the following projects: EU-funded projects: 'Work Organization and Restructuring in the Knowledge Society' (WORKS, Integrating and Strengthening the European Research Area – CIT3/CT/2005-006193, 6th FP, 2005/2009, 'Measuring the Dynamics of Organization and Work (MEADOW – Priority 7: Citizens and Governance in a Knowledge-based Society – 028336, 6th FP, 2007-2010).

[9]We would like to express our gratitute to the Slovak team members, especially, Prof. Lubica Bajzikova, the team coordinator for Slovak data collection and analysis (Lubica Bajuzikova, Helena Sajgalikova, Emil Wojcak, and Michaela Polakova (2008) 'Multinationl and Local Resources – Business Services (Report for Slovakia), Bratislava: *Comenius University in Bratislava – Faculty of Management*, Slovac Republic, May 2009. p. 25).

1.2. Sample of the company survey and sampling method

The cross-country company survey was designed to collect systematic information on the working practices of business service firms operating in Hungary and Slovakia.[10] There is no generally accepted definition for 'business service;' this category covers rather heterogeneous economic activities. In our study, based on screening of the literature and with the intention to produce internationally comparable data, the knowledge-intensive professional services offered for other companies are defined as 'business services,' such as IT services (both software and hardware), administrative and legal services, financial services, and R&D.[11] Table 7 contains the activities selected for the purpose of the company surveys in both Hungary and Slovakia.

In the first quarter of 2008, according to the National Register of Economic Organizations compiled by the Hungarian Central Statistical Office (HCSO), 4,049 companies with 10 or more employees were registered in the field of business services, while 2,714 were registered in Slovakia.[12] In order to design a statistically representative sample of firms, 200 companies were selected from Hungary and 100 companies from Slovakia using a multi-stage stratified sampling method. The basic economic activity of the firms classified by the NACE code was used as the stratification variable. This sampling method ensured equal chances for all companies belonging to the population surveyed to be selected in the sample and reflected in the heterogeneity of the organizational population as well. In other words, the sampling structure reflects the composition of the companies operating

[10] Regarding the service sector, the following classifications were often used (Salter-Tether, 2006): (1) traditional service (e.g., personal service), (2) system service (e.g., airlines and banking), and (3) knowledge-intensive business service (KIBS). The main focus of our research is on activities classified under the KIBS.

[11] For more details, see Makó-Illéssy-Csizmadia (2008).

[12] Bajzikova-Sajgalikova-Wojcak-Polakova, 2009: 5-6.

in various (e.g., ‘new’ and ‘mature’) economic activity branches. For instance, there are more IT companies within the field of IT services than facility management providers or more clothing companies within the ‘mature’ manufacturing than the pharmaceutical industry. The sampling frame was restricted for companies employing at least 10 persons. Firms with 0 to 9 employees were excluded because, according to previous research experiences, these firms are hardly available for surveys and also because the division of labor within these firms is rather underdeveloped, making it difficult to find and compare the forms of organizational innovation with other size categories of firms (Valeyre et al., 2009).

Here, it is noteworthy that, in Hungary, the research covered both the manufacturing and the KIBS sectors. Partly due to the lack of available resources and for the sake of an international comparison, the sample in manufacturing was limited to the following sub-sectors: textile and clothing products, machinery, and the automotive, pharmaceutical, and electrical industries. These sub-sectors represent different ‘maturity cycles’ with respect to the technology used, work organization, and knowledge-use practices. The so-called ‘mature’ industrial sectors are the textile and clothing industries, machinery, and car industries, and the ‘new’ sectors are the pharmaceutical and electrical industries, together with computer equipment producers.

We may summarize the empirical findings concerning the manufacturing sector as follows: the largest segment of the Hungarian manufacturing firms was created at the beginning of the 1990s. Within the group of manufacturing firms, the share of foreign ownership is twice higher than that in the KIBS sector, and, while multinational KIBS firms are supervised by the Hungarian headquarters, the manufacturing firms’ headquarters are located primarily in foreign countries, such as Germany, Austria, and Japan. A very important distinctive feature of the

manufacturing sector compared to the KIBS is that the KIBS firms are focused almost exclusively (94.7 %) on the Hungarian market, while the manufacturing firms have a more balanced distribution between the Hungarian and foreign markets and the manufacturing firms are more active in both the domestic and foreign markets. By and large, the diffusion of less radical or incremental innovation characterizes both sectors. However, the 'interdisciplinary working groups' are more widely diffused in the manufacturing sector.

Table 7. Share of KIBS firms by types of activities (NACE[13] codes) in Hungary and Slovakia (%)

Activity	Hungary	Slovakia
Accounting, finance, and legal services (NACE codes: K 66.1, Activities auxiliary to financial services, except insurance and pension funding; K 66.2, Activities auxiliary to insurance and pension funding; K 64.9, Other financial service activities, except insurance and pension funding; M 69, Legal and accounting activities; M 70, Activities of head offices; management consultancy activities)	20.9	22.7
Human resources management (NACE codes: N 78, Employment activities; P 85.5, Other education)	19.4	20.7
Technical engineering, consultancy (NACE codes: M71, Architectural and engineering activities; technical testing and analysis; M 72, Scientific research and development)	25.2	18.5
Information- and computer-related activities (NACE codes: J62, Computer programming, consultancy, and related activities; J 63, Information service activities)	21.9	21.6
Advertising, marketing, customer service, other services (NACE codes: M 73, Advertising, market research; M 74.3, Translation and interpretation activities; N 77.3, Renting and leasing of other machinery, equipment, and tangible goods; N 81.1, Combined facilities support activities; N81.2.2, Other building and industrial cleaning activities; N 82.2, Activities of call centers)	12.6	16.5
Total	100	100

[13] NACE: 'Statistical Classification of Economic Activities' – an international statistical systems for the classification and registration of economic activities. Source: http://ec.europa.eu/competition/mergers/cases/index/nace_all.html

1.3. Structure of the questionnaire and characteristics of the data Collection

The fieldwork took place in 2008 in Hungary, and the survey was divided into two stages as a result of the summer holiday season. The Slovak survey was carried out between October 2008 and January 2009 in a rather unfriendly climate for social research in the context of the global financial and economic downturn.

To ensure the quality of data collection, specific steps were taken. In addition to the 200-element sample in both countries, additional address lists of 400 companies in Hungary and 200 companies in Slovakia were used to reduce the expected refusal rate of the selected population (managers and/or owners). To guarantee good quality of data, personal interviews were conducted with top managers of the firms surveyed. Before starting the fieldwork, the interviewers and their coordinators were trained by the designers of the project at the Institute of Sociology of the Hungarian Academy of Sciences. In addition, project designers and coordinators randomly supervised the interviewers by follow-up phone calls to respondents. The quality assurance covered the data recording and the compilation of the database as well. During data recording, an automatic control system and internal logical investigations were applied by using special algorithms to minimize the chances of any possible failures. In designing the questionnaire, a pilot survey was conducted to test the possible cognitive contradictions of the planned questions. As a result of the multi-level monitoring of data collection, the final database in the Hungarian business services was restricted to 196 cases and, in the Slovak business services, to 97 cases, ensuring the validity and internal coherence of data. To guarantee the statistical representativeness of the survey, the data sets were weighted. The final database is statistically representative of the firm population surveyed, i.e., the 4,094 companies operating with at least 10

employees in Hungarian business services and the 2,714 companies operating with at least 10 employees in the Slovak business service sectors investigated.

In designing the questionnaire, we made a 'benchmarking exercise' to review the Hungarian and international surveys dealing with various features of organizational innovation. Among other things, we have been learning extensively from such projects as the Danish DISKO (Danish Innovation System in Comparative Perspective) survey carried out five times between 1993 and 2006 by the Aalborg University Business School, the Community Innovation Surveys (CIS) carried out six times by Eurostat, the Continuous Vocational Training (CVTS) survey carried out in 1999 and in 2006 by Eurostat, and several Europe-wide surveys organized by the European Foundation for the Improvement of Living and Working Conditions (Dublin). Finally, in designing our organizational survey methods, the members of the international research team relied substantially on 'The MEADOW Guidelines' (EU 6th FP Project, which '… set out guidelines for collecting and interpreting information on both organizational states and organizational change. The Guidelines are concerned with collecting data at the workplace and employee level providing relevant definitions and indicators for capturing general characteristics of organizations, such as the nature of authority relations and the method of coordination and control.'[14]

In addition, designing the research tools of the Hungarian and Slovak company surveys, in 2007, the Research Group of Sociology of Organization and Work (Institute of Sociology) of the Hungarian Academy of Sciences launched a national survey to test concepts and questions measuring the diffusion of new

[14] The Measuring the Dynamics of Organization and Work (MEADOW) Project funded within the 6th Framework Program of the European Comission DG Research (http://www.meadow-project.eu/).

organizational values or institutional standards in more than 500 industrial firms (Makó-Illéssy-Csizmadia, 2007).

The questionnaire used in the company survey in both countries in the KIBS sectors was finalized after the pilot study, which aimed to test the validity of the questionnaire within the cluster of firms (n=36) belonging to the 'Magyar Outsourcing Szövetség' (Hungarian Outsourcing Association) comprising 'leading-edge' firms in the KIBS sector. The finalized questionnaire, composed of 43 questions, has the following four thematic sections:

1. *General characteristics of firms.* This section contains a description of the architecture of the organization (e.g., length of operation and size), ownership, market structure, types of activities, and type of technology employed.

2. *Composition of Management and Institutional Transfer of Business Practices*. This section includes a report of firms in which foreign managers are employed and an examination of the share of foreign versus local managers, the recruitment practice of foreign managers, and the generic business functions occupied by them. In addition, this section indicates the degree of autonomy in the local subsidiaries in developing their business practices.

3. *Diffusion and Drivers of Organizational Innovation*. In addition to mapping the differences and/or similarities of forms of organizational innovation, this section contains an examination of the degree of embeddedness of the ICT in the business practices in the sectors surveyed. Regarding the forms of organizational innovation, the drivers of innovation are also identified.

4. *Characteristics of Knowledge Development Practice in the Firm*. In this section, the dominant combination of the required skills or competencies is identified. In assessing the training practices of the firms surveyed, we tried to understand not only the roles of the formal training and education in the skill formation of

employees but the importance of the so-called on-site (*in situ*) learning. In addition, particular attention was given to the role of the various external knowledge sources in skill development.

2. Organizational architecture, management, and business practice transfer

The empirical outcomes are based on data collected during 2008 and 2009 company surveys that involved firms employing more than 10 persons in the KIBS sector in both Hungary and Slovakia. The report presents a preliminary descriptive statistical analysis of the survey results using variables such as ownership, company size, year of consolidation, market structure, and company group membership (networking). In addition, this section shows the composition of the management and the patterns of transferring business practices.

2.1. Ownership, size, market structure, and source of the firm's competitiveness

2.1.1. Incorporation and ownership structure of surveyed firms

One-fifth (21.1 %) of the firms in the Hungarian KIBS sector were incorporated (established) in the last four years, and one-fourth (24.7 %), from 2000 to 2003. Only a tiny minority of the firms (6.5 %) were established in the period of state socialism (i.e., before 1990). The peak year of the company establishment in the KIBS sector was at the beginning of the new millennium, when the growth rates of the firms were as follows: 9.8 % in 2004, 7.2 % in 2003, and 7.9 % in 2000. A similar pattern of company creation was identified in Slovakia as well. The overwhelming majority of business service companies in Slovakia were established after 1990, and, as in Hungary, only a share of them (6.5 %) existed during the period of state socialism.

With regard to the ownership structure of the surveyed firms, in both countries, namely, in Hungary (87.5 %) and Slovakia (52.6 %), the domestically owned firms dominate. However, the share of foreign-owned firms is almost three times higher in Slovakia than in Hungary (26.8 % versus 9.5 %). Similarly, the share of mixed ownership is visibly higher in the Slovakia than in Hungary. The composition of firm ownership is shown in Table 8.

Table 8. Ownership composition of firms in the KIBS sectors

Types of ownership	Hungary n=196	Slovakia n=97
Domestic or national ownership	77.5 %	52.6 %
Foreign ownership	9.5 %	26.8 %
Mixed ownership	13.0 %	20.6 %

The KIBS firms are very young and dominated by domestically owned firms. However, in Slovakia, the share of foreign or mixed ownership is significantly higher than in Hungarian business service sector firms. In summary, the majority of the surveyed firms, especially in Hungary, belong to the *de novo* segment (Martin, 2008) of the economy in both countries. They were created following the collapse of the state-socialist economy and are domestically owned.

Membership in a company group or company networking plays an important role in the learning and innovation capacity of business organizations due to access to a greater knowledge pool and smoother knowledge sharing and transferring practices. Firms belonging to a company group tend to be more innovative than single firms. In this field, we found visible differences in the two countries. Company group or network firms represent the minority of the Hungarian business service firms (18.2 %), while, in Slovakia, every second firm surveyed (50.5 %) belongs to this category. In addition, looking at the headquarters ownership, again, the differences are striking. More than three quarters of the Slovak business service

firms belong to groups located in 10 countries, the USA being the most frequent location (28.6 %); the remaining 30 % of firms have headquarters in Germany, UK, and the Czech Republic. An important percentage of the business service firms' headquarters (14.3 %) were located in such countries as Austria, Ireland, France, Netherlands, and Slovenia. In the case of the Hungarian KIBS sector, domestically (or Hungarian) based headquarters dominate. The foreign headquarters are dispersed in 10 countries, and Austria is the dominant location for the company headquarters.

In relation with the important innovation generating impacts of company networking, the following empirical example is noteworthy. The results of the Danish innovation surveys (DISKO) empirically confirm this view: manufacturing firms operating as a member of company groups, especially foreign owned groups, have visibly higher innovation activity than single firms (see Table 9 for details.).

Table 9. Product or service innovation in 1993-95 and/or 1998-2000 ownership/company group membership

	P/S innovation 1993-1995 and 1998-2000	P/S innovation 1993-1995 or 1998-2000	Not P/S innovative	(N)
Danish group member	33.1 %	39.6 %	27.2 %	169
Foreign group member	51.0 %	27.5 %	21.6 %	102
Single firm	22.2 %	32.9 %	44.9 %	216
All firms	32.0 %	34.1 %	33.9 %	487

Note: P=product innovation, S=service innovation
Source: Nielsen, P. (2006: 42)

Nielsen (2006: 42) emphasizes '... single firms have the largest group of the firms with no product innovation in the periods surveyed. Danish group firms have the

largest share of one-time innovators and foreign group firms have the largest proportion of firms with innovation in both periods. This distribution may be an indication of the importance of economic resources or international influence, and not least of the importance of the international or global dimension, on the propensity to innovate among firms.'

2.1.2. Size and Organizational Architecture of Firms: Dominance of Small and Flat Organizations

The next table shows the size distribution of the surveyed firms. In both the Hungarian and the Slovak business service sectors, the share of small firms (i.e., those with 9 to 49 employees) is rather high: almost four-fifths (78.7 %) of the Hungarian KIBS firms belong to this category, but, in the Slovak case, slightly more than every second firm (56.7 %) belongs to this class. It is also noteworthy that there are three times as many large firms in the Slovak KIBS sector (16.5 %) than in Hungary (4.6 %). In addition, there are more Slovak companies in the medium category than in Hungary (26.8 % versus 16.6 %). Briefly, the size of the Slovak KIBS firms is more balanced than that of the Hungarian ones.

Table 10. Size of the firms in the KIBS sector

Size of the firms	Hungary n=196	Slovakia n=97
Small firm (9 – 49 persons)	78.7 %	56.7 %
Medium firm (50 – 249 persons)	16.6 %	26.8 %
Large firm (250 and over)	4.6 %	16.5 %

In addition to the size category, we examined the organizational architecture of the firm. The consensus among organization and management scientists is that the organizational levels separating the highest and lowest positions in the

occupational/job hierarchy influence the flexibility and learning capacity of the firm. In both countries, slightly more than every second business service firm (Hungary: 56.8 % and Slovakia: 56.6 %) has only one or no separate hierarchical level. Besides this similarity in the organizational architecture, the share of Hungarian firms with 2 or 3 hierarchical levels is slightly higher than that in Slovakia (38.1 % versus 29.9 %). However, firms having 4 or more hierarchical levels represent a slightly higher share in the Slovak than the Hungarian KIBS sector (10.5 % versus 13.4 %), which can be explained by the significant share of larger firms in the Slovak KIBS (16.5 %) than the Hungarian one (4.6 %).

Table 11. Types of business services by value-added content

Characteristics of services	Hungary n=196	Slovakia n=97
Customer-tailored	83.7 %	66.3 %
Standardized	32.4 %	33.7 %
High value-added	65.8 %	70.8 %
Low value-added	32.8 %	29.2 %

Comparing the types of business services, basically, similar patterns were identified. In relation with the scale of services, 'customer-tailored' solutions are dominant in both countries. However, in Hungary, they represent a visibly higher share of the services than in Slovakia (83.7 % versus 66.3 %). The standard solutions score minimally and have a roughly similar share in both countries (Hungary: 32.4 % and Slovakia: 33.7 %). Similarly, the high value-added content of services is dominant in both Hungary and Slovakia, although it has a slightly higher share in Slovakia (65.8 % versus 70.8 %). The low value-added services represent less than one third of all services in both countries (Hungary: 32.8 % and Slovakia: 29.2 %). In addition, it is noteworthy that almost one third of the Hungarian (28.6 %) and Slovak firms (29.9 %) exclusively produce high value-added services. However, 14.4 % of

the Hungarian and only 3.1 % of the Slovak firms in the KIBS do not offer high value-added services. The composition of services by degree of standardization and value-added content is illustrated in the Table 11.

Table 12. Market distribution: primary and secondary markets

Types of markets	Hungary n=196		Slovakia n=97	
	Primary market	Secondary market	Primary market	Secondary market
National market	94.7 %	3.4 %	55.4 %	39.9 %
EU-15 countries	10.5 %	4.8 %	22.8 %	38.6 %
New Member States (NMS)	6.5 %	8.0 %	23.3 %	46.7 %
North America	2.4 %	1.5 %	25.6 %	16.3 %
Russia and Ukraine	1.5 %	1.5 %	12.8 %	29.8 %
Asia	1.9 %	2.3 %	11.6 %	25.6 %
Others	1.5 %	-	16.7 %	12.5 %

2.1.3. Market structure: The Slovak KIBS firms are more involved in the Global Value Chain (GVC)

During the survey, managers/owners were asked to locate their market share in relation to their primary and secondary markets. Although to a significantly different degree, the domestic product market is playing a crucial role in both countries. However, the domestic market as the primary market is playing a more important role for Hungary (94.7 %) than for Slovakia (55.4 %). The market structure is more balanced in the Slovak KIBS sector, where the international market (both primary and secondary) is playing a more important role than in Hungary. A higher share of firms is focusing on both the North American (25.6 %) and the EU-15 (22.8 %) markets than in Hungary. In other words, we may say that the Slovak firms are more integrated into the global value chain (GVC) of business services than the

Hungarian ones. Table 12 illustrates the market composition and its relative importance for the firms surveyed.

Table 13. Sources of competitiveness: Hungarian versus Slovak KIBS sector (ranking)

Factors of competitiveness	Hungary n=196	Slovakia n=97
Reliability	92.4 %	85.7 %
Quality	90.5 %	83.5 %
Experience	88.2 %	81.9 %
Flexibility and speed	88.8 %	83.1 %
Skilled labor force	85.7 %	81.8 %
Customer orientation	82.7 %	83.7 %
Price	78.6 %	73.8 %
Variety of products and services	67.4 %	29.9 %
Image and brand	60.4 %	73.2 %
Continuous development of products and services	67.6 %	70.9 %
Lobbying	45.0 %	39.0 %

Note: Factors of competitiveness were measured by managers on a 5-point scale, where 1 is the least important factor and 5, the most important one.

2.1.4. Source of the firms' competitiveness: reliability, quality, and flexibility with slight country variation

During the survey, company managers were asked to assess the role of 11 factors shaping the competitiveness of their firms. As shown in Table 13, in both countries, the following four factors play a similarly decisive role: (1) reliability, (2) quality, (3) flexibility/speed, and (4) experience. The variety of products and services represents the only noticeable difference between factors of competitiveness. In the case of Hungary, more than two thirds of the company managers stressed their importance (67.4 %), compared with less than one third (29.9 %) of their Slovak

counterparts. Surprisingly, price, continuous development of services, branding, and lobbying are also less important.

2.2. Composition of company management and transferring business practices

In this section, we outline the composition of management and the autonomy of the local managers to develop business practices in the subsidiary units of foreign-owned companies. According to previous research (Adler, 1999; Makó-Nemes, 2003: 105-142), the presence of foreign managers (expatriates) played a key role in transferring managerial competence and methods during the acquisition of Hungarian firms by multinational corporations (MNCs), especially in the catch-up phase of the merging market economy in post-socialist countries. Some scholars dealing with transformation economies characterized this early period with the term 'knowledge deficiency,' indicating that the managers socialized in the period of state socialism most often did not possess market economy-consistent competence (Thompson, 1993). However, in the last two decades, local managers successfully acquired the necessary competence to manage their firms. In spite of the progress to diminish the so-called 'knowledge deficiency' syndrome, foreign managers (expatriates) still play crucial roles in assisting their local colleagues in the fields of such high value-added activities as research and innovation.

2.2.1. Dominance of local managers with visible country differences. Expatriates in high value-added business functions

Table 14 shows the composition of managers (foreign and host country national) by the type of generic business functions (services) assigned to them. The general trend in the KIBS sector of the two countries is that the majority of the managerial positions were filled by locals; however, in the Slovak case, the presence of foreign

managers or expatriates is much more visible than in the Hungarian one. In the Slovak KIBS firms, expats are dominant in the fields of accounting and finance. In addition to these functions, their presence is higher than in the Hungarian firms in such functions as production management (41.3 % versus 16.4 %), quality control (QC) (43.5 % versus 27.7 %), sales and marketing (30.3 % versus 17.4 %), customer service (34.8 % versus 5.9 %), ICT (40.4 % versus 6.9 %), and R & D (36.2 % versus 23.0 %).

Table 14. Share of foreign managers and locals in the various business services – greater presence of expats in the Slovak KIBS

Business functions	Hungary n=196		Slovakia n=97	
	Foreign managers	Hungarian managers	Foreign managers	Slovak managers
R&D	23.0 %	63.9 %	36.2 %	63.8
Sales and marketing	17.4 %	72.6 %	30.3 %	69.7 %
ICT	6.9 %	80.8 %	40.4 %	59.6 %
Production management	16.4 %	70.5 %	41.3 %	58.7 %
Customer service	5.9 %	83.6 %	34.8 %	65.2 %
HRM	22.4 %	72.5 %	23.9 %	76.1 %
Quality Control	27.7 %	60.0 %	43.5 %	56.5 %
Accounting and finance	19.3 %	80.7 %	52.2 %	47.8 %

2.2.2. Hybridization as a common pattern in transferring business practices

In the 1990s, there was intense debate in the literature of Human resources management (HRM) concerning the degree of autonomy of subsidiaries of foreign firms (e.g., Japanese automobile plants in the U.S.A.) in developing their business

practices. The concept and practice of hybridization are generally interpreted as a mixture of the host and foreign countries' (e.g., the mother country of the MNCs) business practices.

During the survey, we asked our respondents working in foreign-owned company groups about their degree of autonomy in developing business practices in general and, in particular, to assess their autonomy in creating their HRM system. Local managers in the KIBS sector are not free to operate their business processes. In both countries, the great majority of firms are using the strategy of 'creative adaptation' or 'hybridization' in developing their business practices (Hungary: 69.4 % and Slovakia: 69.5 %). This means that, in Hungarian and Slovak foreign-owned firms, the 'working standards' or the 'guiding principle' of the headquarters plays an important norm setting or 'benchmarking' role in creating local business practices. Local managers, however, still have a certain degree of autonomy in developing the management methods and organizational structure of the firm. In more than one fifth (21.9 %) of the Hungarian firms, local managers are still free to develop their business practices. In Slovak practices, autonomous development of business practice occurs in less than one fifth of the firms (16.2 %).

However, only a minority of firms is copying the business practices of their mother company. The share of firms mechanically adopting the mother company business practice is smaller in Hungary than in Slovakia (8.7 % versus 14.3 %). Finally, it is noteworthy that the role of customer experience is less important for the development of original business practices in both countries (Hungary: 8.3 % versus Slovakia: 7.6 %). The degree of autonomy enjoyed by local managers in the development of their own business practices is shown in Table 15.

Table 15. Autonomy of local managers in creating business practices in subsidiary firms of foreign companies

Sector (Sample size)	Hungary n=32	Slovakia n=38
A) The method of developing business practices		
a) Autonomously but within the framework of the company group guidelines	39.1 %	24.8 %
b) Adapting to the local conditions of the mother company standards	22.1 %	22.9 %
c) Using the standard of the mother company and further development	8.1 %	21.9 %
d) Adopting mechanically (copying) the standards of the mother company	8.7 %	14.3 %
e) Learning from the customer	8.3 %	7.6 %
f) Independently creating business practices	13.6 %	8.6 %
B) Pattern of developing business practices		
a) Creative adaptation: Hybridization	69.3 %	69.5 %
b) Copying	8.7 %	14.3 %
c) Original development	21.9 %	16.2 %

Looking at the creation of HRM practices,[15] the great majority of subsidiary firms of foreign-owned companies significantly respect the local institutional and

[15] In relation to the hybridization of Human Resources Management (HRM), Adler (1999: 75-80) made a distinction among the following five theoretical strands: 1) The 'rational design view,' in which the type of activity or technology of firm shapes the optimal organizational framework for HRM; 2) The 'culturalist approach,' in which adaptation is necessary only in the cases in which the cultural differences between the host and mother countries are significant; 3) The 'strategic strand,' in which the firm indicates that the foreign firm is following a diverse strategy (e.g., geocentric, ethnocentric, and administrative heritage) in controlling the local actitivity of its subsidiary firm; 4) The 'institutional approach,' in which the HRM practice in the subsidiary firm is shaped by 'identical structures' in the subsidiary and mother firms or by the forces of 'isomorphism;' and 5) The HRM practice, which,

labor market regulatory system. This means that the hybridization process is dominant. According to several studies dealing with the institutional transfer of organizational and management practices (e.g., Ishikawa, Makó, Warhurst, 2006; Koike, 1998; Kennedy, Florida, 1991), in the case of the HRM, firms, independently of their economic sector, have greater autonomy than they do in transferring other areas of business practices (e.g., production methods, quality assessment, and auditing). From this viewpoint, the remark of former President Fujio Cho of the Toyota Motor Manufacturing Company in Kentucky (U.S.A.) (Adler, 1999: 86) is revealing:

'I told people here that the (Japanese) coordinators were teachers on production issues and TPS (Toyota Production System), but that they were the students on the office areas, such as Legal, Human Resources, and Public Affairs.'

It is not at all surprising that the number of firms that are copying the mother company Headquarters' system in the KIBS is lower in the field of HRM than that of firms that are copying business practices in general. However, the following contrasting differences were found between the Hungarian and Slovak business service companies. The percentage of firms developing a hybrid version of or mechanically copying the headquarters HRM practices is higher in the Slovak

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according to the 'resource-dependent strand,' in the local subsidiary is the result of the following three forces: mother company, subsidiary firms, and other local institutions. These approaches explain the hybridization of business practice (e.g., HRM) in a rather different way. For instance, in the logic of an 'institutional view,' Scott (1991) notes that, in the case of the HRM practice, the pressure to legitimate is much stronger than the pressure for efficiency. In the argument of the 'resource-dependency strand,' the production practice is less dependent on external actors than it is in the field of HRM, and, according to the 'strategic explanation' for the headquarters of the MNCs, the financial performance of the subsidiaries is more important than the tools or methods used.

(78.4 % and 11.8 %) than the Hungarian firms (58 % and 5.8 %). It is noteworthy that the share of firms autonomously creating their HRM practice is significantly higher in Hungary than in Slovakia (Hungary: 36.2 % versus Slovakia: 9.8 %) (see Table 16.).

Table 16. Patterns of transferring HRM practices into subsidiary firms of foreign companies

Sector (Sample size)	Hungary	Slovakia
Modes of Transfer		
a) Consistent with the local and the headquarters' requirements	30.4 %	45.1 %
b) Local practice created independently from the headquarters of the mother company	36.2 %	9.8 %
c) Adapting the headquarters' HRM system to the local conditions	27.6 %	33.3 %
d) Mechanically copying the HRM practices of the headquarters of the mother company	5.8 %	11.8 %

3. Diffusion and drivers of organizational innovation and the ICT use

3.1. Developing typology of organizational innovation: A brief theoretical overview

Organizational and technological innovations are in interaction, and, even before the Second World War, Schumpeter (1934) recognized the interrelatedness of various forms of innovation and went beyond that to focus exclusively on the technical side of innovation. In his view, technological and organizational innovations were interrelated, and Lam wrote that Schumpeter '...saw organizational changes, alongside new products and processes, as well as markets as factors of 'creative destruction' (Lam, 2005: 115). Schumpeter made a distinction among the five following types of innovation:

1. New product ;
2. New production methods;
3. New markets;
4. New sources of supply;
5. New forms of organization.

Other innovation researchers, following the Schumpeterian intellectual heritage, are looking at the innovation as '... a complex phenomena including technical (e.g., new products and new production methods) and non-technical aspects (e.g., new markets and new forms of organization) as well as product innovation (e.g., new products or services) and process innovation (e.g., new production methods or new forms of organization).' [16] Based on these

[16] See Armbruster et al. (2008: 644-645).

considerations, the authors distinguished four different types of innovation: (1) technical product innovation, (2) non-technical service innovation, (3) technical process innovation, and (4) non-technical process innovation, understood to be organizational innovation.

Unfortunately, in spite of the abundance of literature on organizational innovation, there is no consensus among innovation researchers regarding the definition of 'organizational innovation.' In this respect, Lam (2005: 116) categorized the literature as follows, representing the different interests and issues and to identify and assess organizational innovation:

(1) Organizational design theories deal primarily with relationships between structural forms and the capacity of an organization to innovate (Mintzberg, 1979; Teece, 1998).

(2) The organizational change and adaptation (development) theory is used to understand the ability of an organization to overcome the forces of stability (inertia) and adaptation/change in the context of a radical shift in its environment and technological setting. Innovation represents the capacity to answer or respond to the challenges created by radical shifts in an organization's external environment (Hannan-Freeman, 1984; Child, 1997).

(3) The third theoretical stream focuses on the micro-process level of how an organization understands the characteristics of knowledge creation and learning within an organization. This organizational cognitive approach explains the interplay between learning and organizational innovation (Nonaka-Takeuchi, 1995; Senge, 1990; Amiable, 1988; Argyris-Schön, 1978).

In addition to this effort (Lam, 2005) to classify the various theoretical streams, the Schienstock (2004) innovation matrix intends to integrate key comprehensive organizational innovation. His approach goes beyond dualistic

theoretical strands that made a distinction between isolated (cumulative) and integrative (holistic) innovation (Alasoini, 2003). In Schienstocks' classification attempt, one dimension of classification relates to the 'core' components of an organization, and the other refers to the changes in the 'relations' of the core components. Using these two dimensions, the matrix shown in Table 17 describes the possible types of organizational innovation from both a static and a dynamic perspective.

In this perspective, the cumulative or incremental type of organizational innovation does not produce changes in the core elements and in their relations within an organization. For example, job rotation and job enrichment, which remain in the scope of an individual workplace, are the organizational methods belonging to this type of organizational innovation. According to Schienstock (2004), a modular version of organizational innovation, such as a cross-functional project team, changes the content of the core element of an organization but does not modify the relations among them. Contrary to the incremental and modular types of organizational changes, architectural innovation, such as the decentralization of responsibilities and decisions within an organization, may result in a shift in the existing balance of interest and power relations. Similarly, such radical innovation as the creation of project-based firms (PBF) may modify both the core elements and their relations within the firms. In translating these major forms of innovation into the language of organizational learning, the incremental or modular forms of innovations require a single-loop or first-level mode of learning, and radical innovation represents a double-loop or second level (holistic) form of organizational learning.

Armbruster et al. (2008), implicitly adopting Schienstock's (2004) theoretical classification of organizational innovation, are developing an item-oriented

typology of organizational innovation. In their definition of 'organizational innovation as the use of new managerial and working concepts and practices' (Armbruster et al., 2008: 646), the item-oriented typology of organizational innovation makes a distinction between structural and procedural organizational innovations and their intra-organizational and inter-organizational dimensions (using Schienstock's categories, the incremental and modular innovations are classified into the category of process innovation, and the architectural and radical innovations belong to the category of structural organizational innovation).

Table 17. Typology of organizational innovation*

Relations between the core components of the organization	**Core components of the organization**	
	Not changing	**Changing**
Not changing	*Incremental innovation* (e.g., participation of employees in quality control)	*Modular innovation* (e.g., cross-functional or interdisciplinary project team)
Changing	*Architectural innovation* (e.g., lean organizations)	*Radical innovation* (e.g., project-based firms, PBF)[17]

Source: Shienstock (2004: 18)

An item-oriented typology of organizational innovation, developed by Armbruster at al. (2008), is convenient to empirically measure (monitor) organizational innovation using the tool of organizational surveys.

The groups of an 'item-oriented typology of organizational innovation' are as follows:

1. *Structural organizational innovation*, which may modify the divisional structure of organizational functions, hierarchical levels, and information flow, or, in general,

[17] See Whitley (2004).

the organizational architecture of the firm. This type of innovation requires changes in the existing status quo (and the related interest) and power relations within the organization.

2. *Procedural organizational innovation*, which may change the process and operation routines within the firms, such as improving the flexibility of manpower and the use of knowledge through the implementation of team work, just-in-time production systems (*Kan-Ban* in Japanese), or quality circles.

3. *Intra-organizational innovation* that is taking place within an organization.

4. *Inter-organizational aspects of innovation*, which refer to new organizational forms and processes that exist beyond the organizational border of the firm.

3.2. Diffusion and drivers of organizational innovation

Our company survey was designed to focus exclusively on intra-organizational innovation, and it was not our intention to cover new organizational forms (e.g., project-based firms), which are beyond the scope of the individual firm's organization. Regarding the various forms of intra-organizational innovation, the diffusion of both structural and procedural organizational innovation was our primary interest. The following forms of structural and procedural organizational innovation were assessed by a representative of the firms surveyed:

a) Structural organizational innovation:

- Project-based work;
- Lean or flat organization;
- Inter-professional (functional) working groups.

b) Procedural organizational innovation:

- Quality-assurance or continuous improvement process (e.g., ISO, TQM);
- Collecting suggestions from workers;

- Teamwork;[18]

- Benchmarking;

- Job rotation;

- Delegation of quality assurance to workers (decentralization).

Among the above-listed new organizational or managerial practices, 'structural organizational innovation' is less often used than its 'procedural' version. This is not by chance, because structural organizational innovation affects both the 'core' components and their relationships within the organization. These types of changes require significant modification in the existing interest and power relations and some participation in the collective learning of various actors. On the other hand, successful procedural innovation can be carried out without a radical shift in the core components and their relationships within an organization and requires rather limited learning activity from the actors concerned.

It is clear from the empirical data collected from the company surveys that strong differences are characterizing the diffusion of organizational innovations in the Hungarian and Slovak KIBS sectors. For example, such forms of structural (or radical) organizational innovation as project-based work, lean organization, and inter-professional working groups are more widely used in Slovak than Hungarian KIBS company practices.

In the case of the diffusion of procedural organizational innovation, the contrast diminishes. Teamwork (89.6 % versus 41.7 %), quality management (33.0 % versus 21.9 %), and, particularly, job rotation (28.9 % versus 9.7 %) are more often used in Slovak than Hungarian firms. However, in Hungarian firms, in comparison

[18] Both teamwork and job rotation are key components of the lean production and 'high-performance work systems,' and the use of teams, in particular, has been the subject of many studies concerned with the impact of new managerial practices on enterprise performance and on the quality of work, including worker satisfaction (Kyzlinková, Dokulilová, and Kroupa, 2007).

with the Slovak practice, the quality circles (23.7 % versus 14.4 %), benchmarking (37.3 % versus 21.6 %), and collecting suggestions of employees (49.7 % versus 41.2 %) were more prevalent (see Table 18 for more details).

Table 18. Diffusion of new ('leading edge') managerial practices in the KIBS sector

Types of Organizational Innovation*	Hungary n=196	Slovakia n=97
I. Structural organizational innovation:		
Project-based work	34.8 %	69.1 %
Flat or lean organization	10.7 %	13.4 %
Inter-professional (inter-disciplinary) working groups	13.4 %	36.1 %
II. Procedural organizational innovation:		
Quality Assurance and Auditing Systems (e.g., ISO and TQM)	21.9 %	33.0 %
Collecting suggestions from employees	49.7 %	41.2 %
Team work	41.7 %	89.6 %
Benchmarking	37.3 %	21.6 %
Quality control carried out by rank-and-file employees	23.7 %	14.4 %
Job rotation	9.7 %	28.9 %

Note: Attempts to classify different types of organizational innovation based on the approach of Armbruster et al. (2008: 646-647).

In mapping the diffusion of organizational innovation, besides grouping nine forms of organizational innovations into the categories of 'structural' and 'procedural' innovations, we used the four larger classes of organizational innovations listed below:

1. New methods in *organizing work* (i.e., collecting suggestions from employees, team work, job rotation, and lean organization);

2. Creating *new methods to renew external relations* (networking)[19] with other firms and public institutions;

3. Implementing *new business practices*[20] that have an impact on the organizational and labor process; and

4. Introducing *new knowledge management methods* to improve the quality of information processing and facilitate knowledge sharing.

According to the survey results, there are visible differences in the Hungarian and Slovak company practices in the KIBS sectors. In Slovak business service practices, the share of firms implementing new business practices and new methods of knowledge management is rather high in comparison to the Hungarian case (Slovakia: 44.3 % versus Hungary: 26.1 % and Slovakia: 33.0 % versus 18.0 %). In this relation, it is necessary to mention that one of the key challenges for the high-quality knowledge management (KM) in the KIBS firms is how to codify/formalize the working experiences of project-level learning into organizational knowledge.

In this relation, several options are available. As Salter-Tether (2006:16) reported, 'In order to help ameliorate some of these problems and to increase the effectiveness of their project performance and knowledge sharing between projects, professional service firms have invested considerable resources in knowledge management (KM). This approach to KM varies, with some organizations investing heavily in technology to capture knowledge through documentation and data, and

[19] The content of external relations or networking was as follows: alliances, partnerships, and delocalization of business functions.

[20] The new business practices covered such activities as supply change management, reengineering business process, learning organization, renewal education, and training system.

others introducing cultural change initiatives to encourage knowledge sharing within organization. These KM systems include electronic networks of practice, expert yellow pages, communities of practice, project repositories, searchable internal records, images libraries and mentoring. They are an important part of the infrastructure supporting innovation in professional service firms, allowing them to capture knowledge from past projects and use this knowledge in the future projects.'

The rate of diffusion of new methods of organizing work and creating new methods to renew external relations of the firms are similar in both countries (Hungary: 39.3 % versus Slovakia: 40.2 % and Hungary: 29.9 % versus Slovakia: 29.9 %). Table 19 includes more details of the survey results on this matter.

Table 19. Diffusion of bundles of organizational innovation (multiple answers) in the KIBS sector

Groups of organizational innovation	Hungary n=196	Slovakia n=97
New methods in organizing work (i.e., system for suggestions, team work, and job rotation)	39.3 %	40.3 %
Creating a new method to renew external relations	29.9 %	29.9 %
Implementing new business practices (i.e., reengineering business process and supply-chain management)	26.1 %	44.3 %
Introducing new knowledge management methods	18.0 %	33.0 %

After identifying various forms of organizational innovation, our respondents were asked to assess the drivers of implementation of the new organizational concepts and practices. In both countries, the most important driver is the improvement of the efficiency of daily operations. This factor is followed by the

motives to renew the existing knowledge base, adapting to the environmental changes, strengthening cooperation within an organization, improving quality and customer service, and increasing the size of the firms. Surprisingly enough, the outsourcing or delocalizing business services received the lowest assessment among the driver of organizational changes in both countries. It is noteworthy that such drivers of organizational changes as the renewal of product and services, the renewal of existing knowledge, the increasing size of the firm, and, especially, the outsourcing of business functions play weaker roles in Slovak company practices than in Hungarian ones (see Table 20 for more details).

Table 20. Driving forces behind important organizational changes in the KIBS sector*

Drivers of Organizational Changes	Hungary n=196	Slovakia n=97
Improving daily efficiency of work	73.9 %	67.0 %
Strengthening cooperation within the firm	61.5 %	53.6 %
Adapting to the environmental changes	62.8 %	62.9 %
Renewal of product and services	54.3 %	36.0 %
Renewal of the existing knowledge base	63.5 %	33.0 %
Outsourcing business functions	36.8 %	16.5 %
Improving quality and customer service	65.9 %	44.4 %
Increasing size of the firm	42.5 %	37.2 %

Note: Drivers of organizational changes were assessed by managers on a 5 point-scale, where 1 = the least important and 5 = the most important factor.

Finally, regarding the drivers of organizational innovation, Table 21 presents the main reasons for the lack of organizational innovation. In the case of Hungary, especially, an important segment of the firms (43 % and 12.4 % in Slovakia) carried out organizational changes before the reference period (2005-2007); therefore, no

further efforts were necessary to modernize the organizational practice. In addition, one third of the Hungarian and only one tenth of the Slovak firms' representatives said that, even in the reference period (2005-2007), there was no need for organizational innovation.

In the literature dealing with technological and organizational changes, resistance of employees/managers and skill shortage are frequently reported as constraints of these changes. It is noteworthy that, in the present study, such factors were reported by a tiny minority of respondents and in conjunction with a lack of financial resources.

Table 21. Reasons for the absence of organizational innovation in the KIBS sector*

Factors responsible for the lack of organizational innovation	Hungary n=196	Slovakia n=97
No need for organizational innovation from 2005 to 2007	33.0 %	10.3 %
Implementation of organizational innovation before 2005-2007; since then, no need for further changes	43.0 %	12.4 %
Lack of financial resources	6.9 %	6.2 %
Skill shortage	6.9 %	6.2 %
Resistance of employees and managers to change	5.4 %	7.3 %

Note: Employers interviewed assessed these factors on a 5 point-scale, where 1 = least important and 5 = most important with regard to the absence of organizational innovation.

Comparing organizational innovations on a wider or European perspective, it is worth using some results from the international establishment-level surveys carried out just before our company surveys in Hungary and Slovakia. For example, flexible working time arrangement, mobile work, and home-based telework are among the new organizational (working) practices aimed at improving flexibility in the use of manpower and knowledge within the firm. According to the latest

European Establishment Working Time Survey (ESWT- 2005), Hungary belongs to the 'least flexible country cluster' with such Mediterranean countries as Cyprus, Greece, Portugal, and Italy. On the other hand, Slovenia is located in the 'most flexible country cluster' in the EU countries participating in the survey[21] (see details in Table 22.).

Table 22. Measuring the flexibility of working time: Country clusters

Level of working time flexibility	Countries
Most flexible countries	Denmark, Finland, Latvia, The Netherlands, Sweden, and Slovenia
Flexible countries	Austria, Belgium, Estonia, Ireland, and Luxembourg
Less flexible countries	Lithuania, Bulgaria, Romania, and Spain
Least flexible countries	Cyprus, Greece, Hungary, Portugal, and Italy

Source: Vinken – Ester (2006)

Telework and mobile work are the other tools of organizational innovation used to improve the flexibility of manpower.[22] In this field, Hungary (3.2 %) was located at the bottom, and, among the EU-15 countries, only Portugal had a smaller

[21] In the 2005 Establishment Survey on Working Time, besides the EU-15 countries, the following post-socialist countries participated: Bulgaria, the Czech Republic, Estonia, Latvia, Poland, and Romania.

[22] There are many varieties of telework, not all of which are connected to innovative or learning organizations. However, as is clear from the data below, in the majority of them, it is still only the so-called knowledge worker who is typical of this kind of work. This is reinforced by the fact that the EWCS questionnaire was designed to obtain information about the intensity of telework carried out at home, and, thus, the service centers and call centers, characteristically organized on Taylorist principles, were omitted.

share of teleworkers (1.8 %).[23] Within the group of other post-socialist countries of Central and Eastern Europe (CEE), the highest rate of teleworkers was found in the Czech Republic (16.1 %), but, even in Slovakia (11.7 %), the share of teleworkers was three times higher than that in Hungary.

Due to the fact that the KIBS service sector was characterized by one of the most important concentrations of the so-called 'knowledge workers,' in the company survey, particular attention was given to the sector-level distribution of such forms of organizational and contractual innovations as 'part-time employment,' 'working time flexibility,' 'mobile work,' and 'home-based telework.' The data summarized in Table 23 indicate that these forms of organizational innovation are more integrated into Slovakian than Hungarian employment and working practices.[24]

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[23] To analyze the data, it is important to know that the EWCS dealt with the general characteristics of the working conditions of European employees. In this sense, it was primarily health and safety at work, working hours, general conditions of employment, and the criteria of tasks that were featured in the questionnaire (The Foundation is based in Dublin and supported by the European Commission and by employer and employee organizations coordinated at a European Union-level). It is, thus, understandable that teleworking (not being a central theme in the survey) was only referred to in one request: 'Please evaluate on the scale below how typical it is of your work that you work at home with the help of a PC.' The 7-point scale ranged from 'Always' to 'Never,' and the options offered to respondents were as follows: 'Always,' 'Nearly always,' 'About ¾ of my working time,' 'About ½ of my working time,' 'About ¼ of my working time,' 'Almost never,' and 'Never.' In our analysis, we interpreted these values to mean that 'Almost never' and 'Never' referred to those not involved in teleworking, while all other responses referred to teleworkers.

[24] Comparing the business sector level data to the national one, the following patterns could be identified. In the case of Hungary, the share of mobile workers or home-based teleworkers was several times that reported on the national level.

Table 23. Tools to improve the flexibility of manpower and knowledge use in the KIBS sector

Forms of organizational and contractual innovation	Hungary n=196	Slovakia n=97
Part-time employment	36.1 %	58.8 %
Flexible working time arrangement	26.1 %	76.3 %
Mobile work	15.6 %	39.2 %
Home-based telework	15.4 %	51.5 %

3.3. The practice of ICT use in the firm

It is a commonly shared view among scholars of organizational innovation that, since the last decades of the 20th century, the term 'knowledge economy' has become a catch word for identifying new trends of development. This shift was attributed to the forces of globalization and the growing use of information and communication technology (ICT). According to Ramioul et al. (2006), in contrast to previous technological changes (e.g., automatization) and due to its integrative character, ICT represents an 'organizational technology' that offers to the actors concerned specific opportunities to shape the division of labor and the practices of knowledge use. In this sense, Nielsen (2006: 15-16) added that, during the so-called 'take-off' period of the ICT in the mid-1980s, 'the more narrow rationalization phase dominated up to the end of eighties; than in the early nineties a more organic, pervasive and information-oriented approach to the use of ICT started to emerge. The importance of thinking new ICT into, as an integrative part of, new managerial and organization forms became more widely recognized. Even though rationalization was still an important function, information and communication came to be seen as more and more important functions. This development of ICT from pure rationalization towards information and

communication functions is in line with the view held by Zuboff (1985); the phases, however, are not 'clean' ... we still empirically presume rationalization to be an important function in the use of ICT.'

Using the extensive quotation from Nielsen (2006), we intend to call attention to the various degrees of embeddedness of ICT in the everyday working and management practice of the firm. It is widely known that ICT plays various crucial roles in the everyday life of a firm, especially in the service sector.[25] According to our experience, ICT is more intensively used in the KIBS than in the manufacturing sector. This could be explained by the fact that '... ICT process innovation is often a necessary prerequisite for the service innovation in this industry' (Nielsen, 2006: 56).

ICT can be implemented and used in a multitude of functions, such as information processing and communication, and in different fields of activity of firms, such as routine production, research, and development within the business process. Our survey aimed to identify the functions in which ICT is employed in KIBS firms in both countries. A crucial role of ICT in the organizational changes or, more precisely, in the diffusion of organizational innovation is widely supported by the results of a recent international study on the restructuring of the value chain in both the manufacturing and service sectors (Flecker – Holtgrewe – Schönauer – Dunkel – Meil, 2008).

As shown in Table 24, ICT is used more extensively in the Hungarian than in Slovakian company practices. This is especially true in such basic functions as information processing and communication (Hungary: 68.7 % versus Slovkia:

[25] For example, in the U.S.A., more than 70 % of the ICT equipment is purchased by service companies. The selection, implementation, and integration of this technology are key factors in their business success (Chesborough – Shphrer, 2006).

42.9 %). In addition, in the development activities, which are emblematic fields for the deeper and more intensive use of ICT, Hungarian firms are again in a better position than Slovakian business service firms (Hungary: 44.9 % versus Slovakia: 27.8 %).

Table 24. Use of ICT by function and location in the business process in the KIBS sector

Function/location of business process	Hungary n=192	Slovakia n=97
Information processing and communication	68.7 %	42.9 %
Rationalization of labor process and reengineering company development	34.3 %	29.3 %
Development activities (e.g., development of knowledge base)	44.9 %	27.8 %

4. Skill requirements and knowledge development practice in the firm

4.1. Differences in skill development and the key role of experience-based learning

Chapter 4 is a report on the issue of knowledge development practices within a firm, and, in this relation, organizational learning indicates '… the capacity (or process) within an organization to maintain or improve performance based on experience. This activity involves knowledge acquisition (the development or creation of skills, insights, relationships), knowledge sharing (the dissemination to others of what has been acquired by some), and knowledge utilization (integration of the learning so that it is assimilated, broadly available, and can also be generalized to new situations' (DiBella – Nevis – Gould, 1996: 363). There is a strong interplay between innovation and the learning process within the organization, and, in this respect, it is noteworthy that the complementary character of the formal education and experience-based learning as Nielsen (2006: 117) summarized:

'To make learning complete and sufficient, with the innovative mode in focus, it is necessary to combine experience-based and reflective learning with the new knowledge achieved from formal training and education. Only in this way does learning become both knowledge-based and experience-based, and may evolve dynamically in the context of the organization ... Competence development and continuous vocational training must form the two sides of the same coin in the learning organization`s employment system, and be complementary to its production strategies.'

Skills development and formal training are important preconditions for innovation. However, an individual's ability to perform within a specific job situation is extremely important. 'While qualifications are individually adopted characteristics, built into and carried out by a person, competence as a concept has to do with specific job situations and assignments, and concerns the capacity of an employee to use his or her qualifications in the job situation ... the potential possibilities to act in a specific assignment, situation or context. In line with this definition, *competence development* as a concept in this context will be defined as continuous development of experiences, skills, influence, possibilities and responsibilities, related to the job situation, tasks and context of the employees' (Nielsen, 2006: 124).

Prior to describing the knowledge development practices of the firms surveyed, we identified the types of knowledge and skills required by the employers. The most important knowledge evaluated by the employers interviewed in both countries is described as follows:

1. Professional-technical skills (Hungary: 93.7 % and Slovakia: 98.1 %);
2. Reliability on the job (Hungary: 97.5 % and Slovakia: 89.1 %);
3. Customer-centered attitude (Hungary: 90.3 % and Slovakia: 86.5 %).

Evaluating the importance of the various methods of knowledge development in the firm, the following classification was used:

(1) Participation in formal education;

(2) Competence development;

(3) Improving social skills.[26]

[26] Besides the briefly presented classifications of knowledge preconditions for learning or innovative organization, another strand of the labor process school makes a disctintion between 'learning as acquisition' and 'learning as participation.' Quoting Felstead et al. (2008: 5), 'The former refers to a conceptualization, which views learning as a product with a visible, identifiable outcome, often accompanied

In both countries, forms of experience-based ('on-site') knowledge or competence development, such as 'consulting with management/other employees' and 'on-the-job training (OJT),' are playing a more important role than participation in formal education (e.g., participation in courses/educational schemes and involvement in further training tailored for the needs of the firm).[27] In spite of this common pattern, it is noteworthy that the formal training (e.g., standard educational schemes, further training) is playing a relatively more significant role in Slovakian business service firms than in Hungarian ones.

Table 25. Methods of knowledge development in the KIBS sector*

Methods of knowledge development	Hungary n=196	Slovakia n=97
I. Participation in formal education		
Standard courses/educational schemes	45.5 %	60.4 %
Further training designed according to the needs of the firm	64.3 %	69.6 %
II. Experience-based learning or competence development		
Consulting with management/other employees	80.3 %	75.5 %
On-the-job training (OJT)	74.1 %	70.3 %
Attending professional fairs and expositions	67.5 %	44.3 %
Job rotation	31.1 %	40.1 %
III. Improving social skills		
Supporting cooperation between organizational units	62.6 %	63.3 %
Teamwork	57.1 %	74.0 %

by certification or proof of attendance. The latter perspective, on the other hand, views learning as a process in which learners improve their work performance by carrying out daily activities.' This distinction is similar to the distinction of 'formal education' and 'competence development.'

[27] According to the experiences of a European-wide project carried out in 13 countries on outsourcing software development in a leading IT firms, only 10 % of training activities were based on training programs, and the remaining 90 % represented on-the-job training (OJT) (Flecker-Holtgrewe-Shönauer-Dünkel-Meil, 2008: 57).

The importance of training aimed at improving the social skills of employees (e.g., motivation of cooperation between various organizational units and job rotation) is located between the 'competence development' and 'participation in formal education.'

In both countries, 'consulting with managers and other employees' and 'on-the-job training' (or 'learning by participation') were more often used as tools of knowledge development than 'participation in the formal training' (or 'learning by acquisition'). In addition to this common pattern of knowledge development, we identified slight differences, too. Such sources of experience-based learning as 'attending professional fairs and expositions' are playing a more important role in Hungary than in Slovakia, (67.5 % versus 44.3 %); however, 'job rotation' is organized more frequently in Slovakian than Hungarian business firms (40.1 % versus 31.1 %). In relation with the development of social skills, the cooperation between organizational units has similarly important roles in both countries (Hungary: 62.6 % and Slovakia: 63.3 %), but team-work as a widely recognized source of social skill development [28] is more widely used in Slovakian than Hungarian business service firms (74.0 % versus 57.1 %). Table 25 illustrates the methods of knowledge development employed in company practices.

4.2. Company training practice: more training and stronger reliance on the external knowledge sources in Slovakia than Hungary

While the former section focused on the identification of various forms of knowledge development (i.e., participation in formal education, experience-based learning, and improving social skills), this section deals with the issue of company training practice and the role of external knowledge sources.

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[28] Kyzlinková, R., Dokulilová, L., Kroupa, A. (2007).

According to the data stemming from the latest wave (2005) of the European Continuing Vocational Survey[29] (CVTS), European countries vary remarkably in terms of their company training practices.

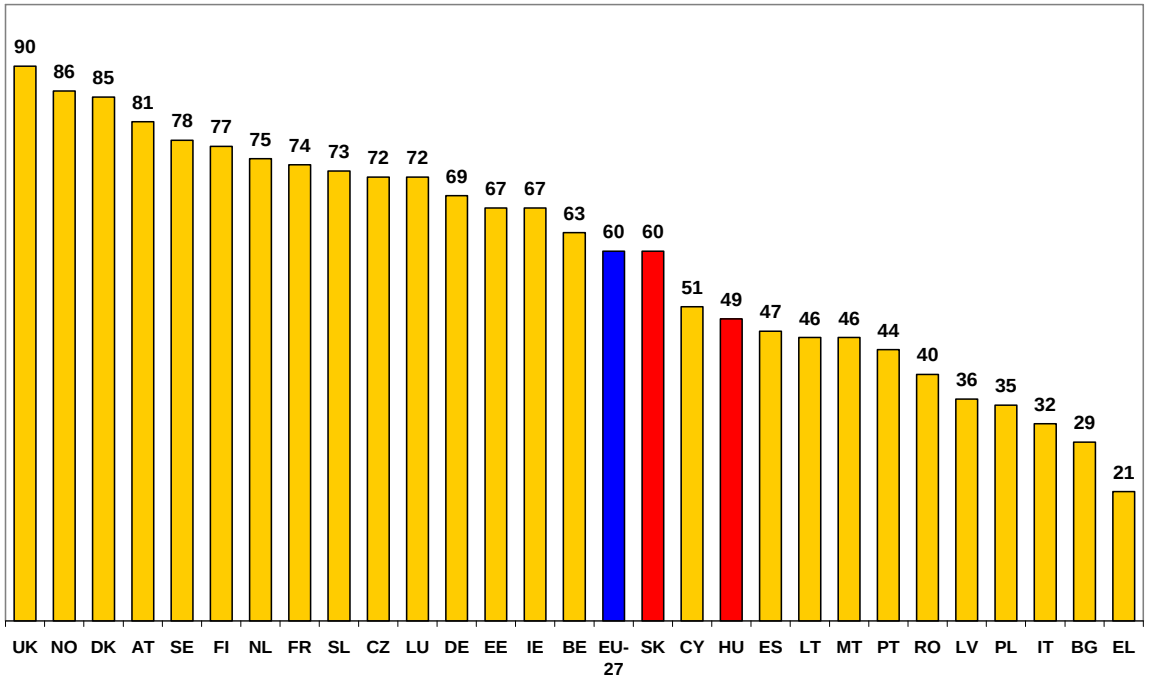
As shown in Figure 4, an average of 60 % of the European companies provided formal and/or informal training courses to employees in 2005. The UK, the Nordic countries (Norway, Denmark, Sweden, and Finland), and some continental countries (Austria and the Netherlands) have the largest proportion of training providers. Among the post-socialist countries, Slovenia, the Czech Republic, and Estonia are in a better position than the EU average. Romania, Latvia, Poland, Italy, Bulgaria, and Greece are lagging far behind the EU average. Slovakia performs around the average, while Hungary is in a weaker position (49 %). It is noteworthy, however, that country differences can be partly explained by the various institutional settings of the different vocational training systems (e.g., in UK firms, specific company training plays an important role in the vocational training system, which is not the case in most post-socialist countries).

If we broaden the scope and take not just the proportion of companies that provide training but also the percentage of the employees participating in training activities, the picture becomes more complex. Approximately every third employee participated in company training in Europe in 2005. There are, however, remarkable differences among the European countries. In the Czech Republic, almost 60 % of all employees participated in training courses, and Slovenia, Ireland, Luxembourg, France, and Sweden also performed far above the average in this respect. Romania, Hungary, Bulgaria, Latvia, Lithuania, and Greece are in the worst position within the

[29] The Continuing Vocational Training Survey (CVTS) is a European Union-wide representative employer survey on vocational training practices of the European enterprises carried out by the Eurostat.

EU-27. In Slovakia, 38 % of all employees took part in formal and/or informal company training, while this proportion in Hungary was only 16 %, far below the European average. These data indicate that there are rather large inequalities among Hungarian employees in terms of the access to new knowledge. The low participation rate indicates that the access to and transfer of knowledge within companies, which are prerequisites of innovation and high-value-added economic activities, are limited.

Figure 4. Distribution of enterprises providing training courses* in the percentage of all enterprises by European countries[30] in 2005



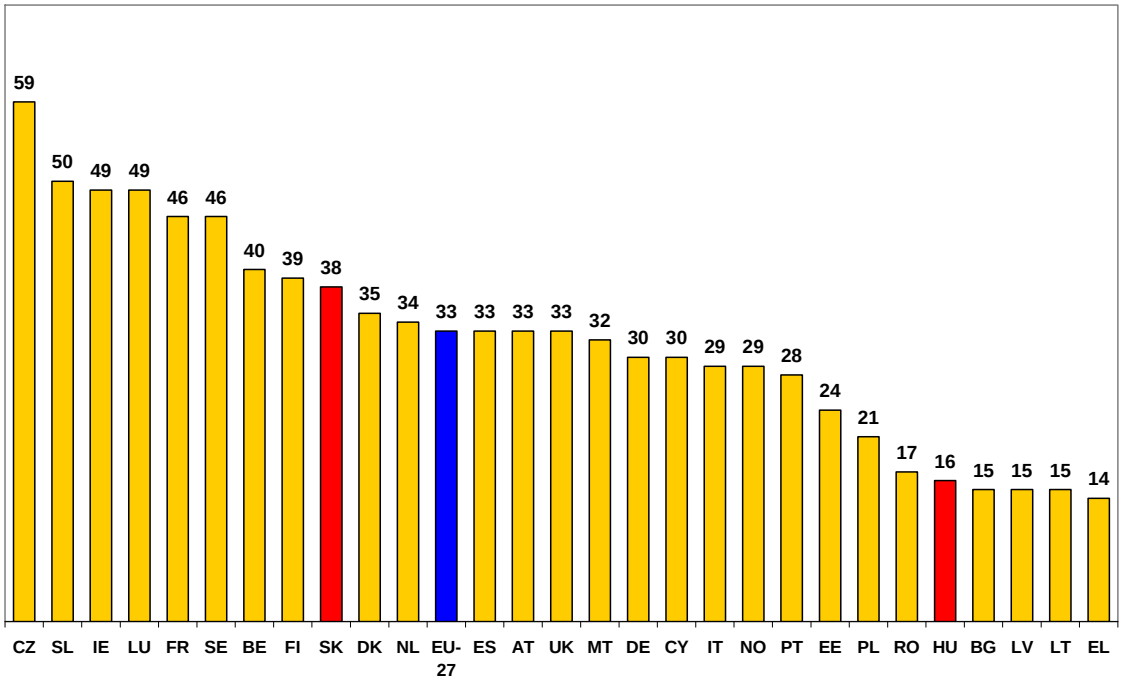
Source: CVTS 2005
* Both formal and informal training

The findings of the joint survey provide broader insight into the company practices of the Hungarian and Slovakian KIBS firms. Empirical outcomes indicate visible differences in the company practices of the two countries. As shown in Table

[30] EU-27 + Norway

26, in Slovakian business service firms, in 2007, every second employee (50.7 %) participated in a training course organized and financed by the firms. In the case of Hungary, less than one third of the firms organized and financed training of their employees (31.2 %). Employee autonomy in participating in training, again, is stronger in Slovakia than in Hungary (Slovakia: 24.5 % versus Hungary: 16.1 %). Even in the case of training supported by non-financial means (e.g., working time reduction), Slovakian firms are doing visibly better than their Hungarian counterparts (10.8 % versus 5.4 %).

Figure 5. Percentage of employees participating in CVT courses* in 2005 by European countries in 2005



Source: CVTS 2005
* Both formal and informal training

Finally, dealing with the knowledge development practices of the firms, special attention was given to the role of external knowledge resources. Scholarly consensus among those dealing with innovation is that organizational differences in

generating innovation are intimately related to 'absorption' or to the dynamic capabilities of companies. The dynamic capabilities indicate the 'firms' ability to integrate, build and reconfigure internal and external competences to address rapidly changing environments' (Lazonick, 2006: 33). In relation to the particular importance of external knowledge in the radical innovation generation process within the KIBS sector, Salter and Tether (2006: 13) stressed that:

Table 26. The rates of company-supported training

Forms of training and support	Hungary n=196	Slovakia n=97
Courses organized and financed by the firm	31.2 %	50.7 %
Courses selected by an employee but financed by the firm	16.1 %	24.5 %
Courses supported by working time reduction	5.4 %	10.8 %

With respect to the **content of the training**, we found that, in both countries, almost half of the training courses aimed to improve job-related specific knowledge and two-fifths of the employees were involved in the job-specific + general training. In both sectors, less than 10 % of employees had a chance to participate in training activities improving their generic knowledge and competencies (e.g., language and communication skills).

'Radical innovations in these industries will typically involve changes more than one of the triumvirate of the employees' division of labor, technologies, and organization, as their complex intertwining can create powerful barriers to innovation amongst incumbents. Outsiders and newcomers are therefore the main source of more radical innovation. When incumbents do initiate the change (…) this is typically through a new and separate organization.'

Table 27. External sources of knowledge development (multiple answers) in the KIBS sector

External knowledge sources	Hungary n=196	Slovakia n=97
Customers	79.2 %	61.9 %
Suppliers, service providers	62.1 %	59.8 %
External consulting	54.2 %	68.0 %
Higher educational institutions	27.4 %	55.7 %
Educational (training) institutions	29.0 %	66.0 %
Research institutes	19.7 %	28.9 %
Development agencies	26.5 %	23.7 %
Labor market agencies, professional associations	25.9 %	43.3 %

Identifying the importance of external knowledge sources, managers participating in the company surveys were asked to assess the role of these sources. Table 27 contains the shares of the external knowledge source use in Hungarian and Slovakian business service firm practices.

Ranking in order, the experience and knowledge of customers, suppliers, and external consulting are the most important external knowledge sources in both countries in comparison to such external knowledge sources as 'higher education,' 'training institutions,' and 'labor market institutions.' However, these institutions, especially educational (training) institutions and labor market agencies, continue to play more important roles in Slovakian than in Hungarian company practices. We need to include other factors (e.g., R & D expenditure, access to a highly educated and skilled population, and quality of institutions) to better understand the systematic prerequisites for the knowledge-based growth in the countries

investigated.[31] However, the relatively stronger reliance on the variety of external knowledge sources in the Slovak KIBS in comparison to Hungary indicates the better innovation and learning potential of Slovak KIBS firms.

[31] See Veugelers (2010).

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Appendix 1.

Branches (by NACE Codes) Grouped into Knowledge-intensive and Less- knowledge-intensive Service Sectors

	NACE codes[32]	Branches
Knowledge-intensive services	61	Water transport
	62	Air transport
	64	Post and telecommunications
	65	Financial intermediation, except insurance and pension funding
	66	Insurance and pension funding, except compulsory social security
	67	Activities auxiliary to financial intermediation
	70	Real estate activities
	71	Renting of machinery and equipment without operator and of personal and household goods
	72	Computer and related activities
	73	Research and development
	74	Other business activities
	80	Education
	85	Health and social work
	92	Recreational, cultural, and sporting activities
Knowledge-intensive high-technology services	64	Post and telecommunications
	72	Computer and related activities
	73	Research and development
Knowledge-intensive market services (excluding financial intermediation and high-tech services)	61	Water transport
	62	Air transport
	70	Real estate activities
	71	Renting of machinery and equipment without operator and of personal and household goods
	74	Other business activities
Knowledge-intensive financial services	65	Financial intermediation, except insurance and pension funding
	66	Insurance and pension funding, except compulsory social security
	67	Activities auxiliary to financial intermediation
Other knowledge-intensive services	80	Education
	85	Health and social work
	92	Recreational, cultural, and sporting activities

[32] NACE Rev. 1.1 codes

Less-knowledge-intensive services	50	Sale, maintenance, and repair of motor vehicles and motorcycles; retail sale of automotive fuel
	51	Wholesale trade and commission trade, except for motor vehicles and motorcycles
	52	Retail trade, except for motor vehicles and motorcycles; repair of personal and household goods
	55	Hotels and restaurants
	60	Land transport; transport via pipelines
	63	Supporting and auxiliary transport activities; activities of travel agencies
	75	Public administration and defense; compulsory social security
	90	Sewage and refuse disposal, sanitation, and similar activities
	91	Activities of membership organizations n.e.c.[33]
	93	Other service activities
	95	Activities of households as employers of domestic staff
	99	Extra-territorial organizations and bodies
Less-knowledge-intensive market services	50	Sale, maintenance, and repair of motor vehicles and motorcycles; retail sale of automotive fuel
	51	Wholesale trade and commission trade, except for motor vehicles and motorcycles
	52	Retail trade, except for motor vehicles and motorcycles; repair of personal and household goods
	55	Hotels and restaurants
	60	Land transport; transport via pipelines
	63	Supporting and auxiliary transport activities; activities of travel agencies
Other less-knowledge-intensive services	75	Public administration and defense; compulsory social security
	90	Sewage and refuse disposal, sanitation, and similar activities
	91	Activities of membership organizations n.e.c.
	93	Other service activities
	95	Activities of households as employers of domestic staff
	99	Extra-territorial organizations and bodies

[33] Not even considered

Appendix 2.

NACE: Knowledge-intensive high-technology services: NACE Rev. 1.1 codes 64, 72, and 73
UNIT: Percentage of total employment

TIME	2000	2005	2006	2007	2008
GEO					
European Union (EU-27)	3.21 (i)	3.28	3.32	3.29	:
Belgium	3.86	3.74	3.92	3.89	3.75
Bulgaria	2.52	2.71	2.59 (b)	2.54	:
Czech Republic	3.04	3.17	2.94 (b)	2.99	3.06
Denmark	5.04	4.32	4.39 (b)	4.19 (b)	4.30
Germany	3.03	3.34 (b)	3.47 (b)	3.44	3.36
Estonia	2.87 (b)	2.47 (u)	2.54 (b)	2.55	2.60
Ireland	4.01	3.57	3.76 (b)	3.70	3.80
Greece	1.57	1.74	1.99 (b)	1.95	1.82
Spain	2.29	2.70 (b)	2.98 (b)	2.95	2.77
France	3.86	3.99	3.89 (b)	3.40	3.71
Italy	2.93	2.98	3.06 (b)	3.12	3.17
Cyprus	1.67	2.12	1.97 (b)	2.33	2.22
Latvia	2.29	2.68	2.52 (b)	2.47	2.59
Lithuania	2.31	1.96	2.05 (b)	2.10	2.33
Luxembourg (Grand...	2.66	3.33	3.28	3.37	3.37
Hungary	3.09	3.15	3.42 (b)	3.28	3.28
Malta	3.06	3.03	3.07 (b)	3.25	3.79
Netherlands	4.13 (b)	4.12	3.83 (b)	4.26	4.30
Austria	2.80	3.04	2.75 (b)	2.59	2.92
Poland	:	2.27	2.38 (b)	2.57	:
Portugal	1.19	1.81	1.85 (b)	1.70	1.83
Romania	1.39	1.40	1.61 (b)	1.52	1.73
Slovenia	2.54	2.96	2.74 (b)	2.80	:
Slovakia	2.97	2.67	2.56 (b)	2.89	2.77
Finland	4.39 (b)	4.51	4.59 (b)	4.56	4.85
Sweden	5.13	5.12 (b)	5.06 (b)	5.07	:
United Kingdom	4.30	4.30	4.22 (b)	4.36	4.26
Croatia	:	2.22	2.11 (b)	2.63 (b)	2.50
Former Yugoslav R...	:	:	1.43 (b)	1.60	:
Turkey	:	:	.80 (b)	.83	.85
Iceland	4.41	4.75	4.13 (b)	4.06	3.75
Norway	3.77	3.81	3.92 (b)	3.82	3.74
Switzerland	3.73	3.96	3.79 (b)	3.75	3.88

Appendix 3.

NACE: Knowledge-intensive high-technology services: NACE Rev. 1.1 codes 64, 72, and 73
UNIT: Percentage of total employment

TIME	2000	2005	2006	2007	2008
GEO					
European Union (EU-27)	3.21 (i)	3.28	3.32	3.29	:
Belgium	3.86	3.74	3.92	3.89	3.75
Bulgaria	2.52	2.71	2.59 (b)	2.54	:
Czech Republic	3.04	3.17	2.94 (b)	2.99	3.06
Denmark	5.04	4.32	4.39 (b)	4.19 (b)	4.30
Germany	3.03	3.34 (b)	3.47 (b)	3.44	3.36
Estonia	2.87 (b)	2.47 (u)	2.54 (b)	2.55	2.60
Ireland	4.01	3.57	3.76 (b)	3.70	3.80
Greece	1.57	1.74	1.99 (b)	1.95	1.82
Spain	2.29	2.70 (b)	2.98 (b)	2.95	2.77
France	3.86	3.99	3.89 (b)	3.40	3.71
Italy	2.93	2.98	3.06 (b)	3.12	3.17
Cyprus	1.67	2.12	1.97 (b)	2.33	2.22
Latvia	2.29	2.68	2.52 (b)	2.47	2.59
Lithuania	2.31	1.96	2.05 (b)	2.10	2.33
Luxembourg (Grand...	2.66	3.33	3.28	3.37	3.37
Hungary	3.09	3.15	3.42 (b)	3.28	3.28
Malta	3.06	3.03	3.07 (b)	3.25	3.79
Netherlands	4.13 (b)	4.12	3.83 (b)	4.26	4.30
Austria	2.80	3.04	2.75 (b)	2.59	2.92
Poland	:	2.27	2.38 (b)	2.57	:
Portugal	1.19	1.81	1.85 (b)	1.70	1.83
Romania	1.39	1.40	1.61 (b)	1.52	1.73
Slovenia	2.54	2.96	2.74 (b)	2.80	:
Slovakia	2.97	2.67	2.56 (b)	2.89	2.77
Finland	4.39 (b)	4.51	4.59 (b)	4.56	4.85
Sweden	5.13	5.12 (b)	5.06 (b)	5.07	:
United Kingdom	4.30	4.30	4.22 (b)	4.36	4.26
Croatia	:	2.22	2.11 (b)	2.63 (b)	2.50
Former Yugoslav R...	:	:	1.43 (b)	1.60	:
Turkey	:	:	.80 (b)	.83	.85
Iceland	4.41	4.75	4.13 (b)	4.06	3.75
Norway	3.77	3.81	3.92 (b)	3.82	3.74
Switzerland	3.73	3.96	3.79 (b)	3.75	3.88

Appendix 4.

NACE: Knowledge-intensive financial services: NACE Rev. 1.1 codes 65, 66, and 67
UNIT: Percentage of total employment

TIME	2000	2005	2006	2007	2008
GEO					
European Union (EU-27)	3.11 (i)	2.96	2.95	2.97	:
Belgium	4.05	3.83	3.66	3.72	3.96
Bulgaria	1.13	1.27	1.26 (b)	1.35	:
Czech Republic	2.04	2.03	1.91 (b)	2.07	2.30
Denmark	3.40	3.24	3.32 (b)	3.07 (b)	3.07
Germany	3.66	3.62 (b)	3.39 (b)	3.50	3.41
Estonia	1.46 (bu)	1.13 (u)	1.13 (bu)	1.43 (u)	1.59 (u)
Ireland	4.11	4.41	4.20 (b)	4.43	4.47
Greece	2.64	2.60	2.62 (b)	2.55	2.60
Spain	2.68	2.41 (b)	2.23 (b)	2.40	2.66
France	3.09	3.02	3.28 (b)	3.09	3.13
Italy	3.20	2.84	2.94 (b)	2.87	2.80
Cyprus	5.70	5.23	5.32 (b)	4.98	5.14
Latvia	1.23	1.92	2.25 (b)	1.93	1.74
Lithuania	.99	1.11 (u)	1.11 (bu)	1.45	1.33
Luxembourg (Grand...	9.95	11.34	11.32	10.54	10.55
Hungary	2.23	2.06	2.05 (b)	2.16	2.44
Malta	3.87	4.11	4.24 (b)	4.16	3.76
Netherlands	3.46 (b)	3.32	3.35 (b)	3.18	2.93
Austria	3.79	3.76	3.39 (b)	3.36	3.49
Poland	:	2.09	2.24 (b)	2.38	:
Portugal	1.90	1.89	1.77 (b)	1.88	1.88
Romania	.88	.94	.99 (b)	1.04	1.18
Slovenia	2.43	2.44	2.35 (b)	2.45	:
Slovakia	1.77	2.17	2.25 (b)	2.02	2.27
Finland	2.11 (b)	1.86	2.02 (b)	2.01	2.14
Sweden	1.95	1.86 (b)	1.90 (b)	1.95	:
United Kingdom	4.35	4.23	4.34 (b)	4.35	4.23
Croatia	:	1.82	2.46 (b)	2.27 (b)	2.11
Former Yugoslav R...	:	:	1.24 (b)	1.53	:
Turkey	:	:	1.07 (b)	1.11	1.13
Iceland	4.15	4.11	4.34 (b)	4.93	5.09
Norway	2.20	2.22	2.16 (b)	2.34	2.09
Switzerland	4.84	5.51	5.73 (b)	5.79	5.79

Appendix 5.

NACE: Other knowledge-intensive services: NACE Rev. 1.1 codes 80, 85, and 92
UNIT: Percentage of total employment

TIME	2000	2005	2006	2007	2008
GEO					
European Union (EU-27)	17.22 (i)	18.45	18.53	18.43	:
Belgium	21.63	23.27	23.09	22.69	22.88
Bulgaria	14.70	13.87	13.83 (b)	13.31	:
Czech Republic	14.27	14.97	14.74 (b)	14.74	14.15
Denmark	26.25	27.58	27.48 (b)	28.13 (b)	28.17
Germany	16.79	18.74 (b)	18.69 (b)	19.21	19.44
Estonia	16.38 (b)	17.65	17.92 (b)	16.83	16.47
Ireland	16.40	18.42	18.73 (b)	19.43	19.87
Greece	12.22	13.58	13.91 (b)	14.01	13.86
Spain	12.69	13.71 (b)	14.30 (b)	13.98	13.90
France	19.78	21.16	21.06 (b)	21.16	20.92
Italy	14.40	15.03	15.16 (b)	15.11	15.23
Cyprus	11.25	13.04	13.33 (b)	13.40	13.15
Latvia	16.22	16.31	15.26 (b)	14.16	15.58
Lithuania	19.87	18.53	17.64 (b)	17.78	17.86
Luxembourg (Grand...	15.80	18.36	19.43	19.08	19.93
Hungary	16.50	17.07	17.08 (b)	16.85	16.55
Malta	17.33	17.38	17.49 (b)	17.62	17.96
Netherlands	21.54 (b)	24.22	24.50 (b)	24.75	24.36
Austria	15.43	16.69	16.34 (b)	15.84	16.59
Poland	:	14.93	15.03 (b)	14.49	:
Portugal	12.08	13.86	13.90 (b)	13.86	13.86
Romania	7.84	9.30	9.40 (b)	9.15	9.18
Slovenia	13.49	14.73	15.56 (b)	15.38	:
Slovakia	16.43	15.87	15.36 (b)	14.87	14.24
Finland	22.94 (b)	24.66	24.71 (b)	24.24	24.18
Sweden	29.10	30.22 (b)	29.80 (b)	29.38	:
United Kingdom	21.92	24.19	24.71 (b)	24.12	24.28
Croatia	:	12.73	13.32 (b)	13.34 (b)	13.53
Former Yugoslav R...	:	:	13.07 (b)	13.44	:
Turkey	:	:	7.47 (b)	7.39	7.71
Iceland	22.67	25.92	25.39 (b)	25.82	27.33
Norway	27.58	30.31	30.21 (b)	29.93	31.06
Switzerland	19.91	22.04	22.07 (b)	22.32	22.84

Appendix 6.

NACE: Other knowledge-intensive services: NACE Rev. 1.1 codes 80, 85, and 92
UNIT: Percentage of total employment

TIME	2000	2005	2006	2007	2008
GEO					
European Union (EU-27)	17.22 (i)	18.45	18.53	18.43	:
Belgium	21.63	23.27	23.09	22.69	22.88
Bulgaria	14.70	13.87	13.83 (b)	13.31	:
Czech Republic	14.27	14.97	14.74 (b)	14.74	14.15
Denmark	26.25	27.58	27.48 (b)	28.13 (b)	28.17
Germany	16.79	18.74 (b)	18.69 (b)	19.21	19.44
Estonia	16.38 (b)	17.65	17.92 (b)	16.83	16.47
Ireland	16.40	18.42	18.73 (b)	19.43	19.87
Greece	12.22	13.58	13.91 (b)	14.01	13.86
Spain	12.69	13.71 (b)	14.30 (b)	13.98	13.90
France	19.78	21.16	21.06 (b)	21.16	20.92
Italy	14.40	15.03	15.16 (b)	15.11	15.23
Cyprus	11.25	13.04	13.33 (b)	13.40	13.15
Latvia	16.22	16.31	15.26 (b)	14.16	15.58
Lithuania	19.87	18.53	17.64 (b)	17.78	17.86
Luxembourg (Grand...	15.80	18.36	19.43	19.08	19.93
Hungary	16.50	17.07	17.08 (b)	16.85	16.55
Malta	17.33	17.38	17.49 (b)	17.62	17.96
Netherlands	21.54 (b)	24.22	24.50 (b)	24.75	24.36
Austria	15.43	16.69	16.34 (b)	15.84	16.59
Poland	:	14.93	15.03 (b)	14.49	:
Portugal	12.08	13.86	13.90 (b)	13.86	13.86
Romania	7.84	9.30	9.40 (b)	9.15	9.18
Slovenia	13.49	14.73	15.56 (b)	15.38	:
Slovakia	16.43	15.87	15.36 (b)	14.87	14.24
Finland	22.94 (b)	24.66	24.71 (b)	24.24	24.18
Sweden	29.10	30.22 (b)	29.80 (b)	29.38	:
United Kingdom	21.92	24.19	24.71 (b)	24.12	24.28
Croatia	:	12.73	13.32 (b)	13.34 (b)	13.53
Former Yugoslav R...	:	:	13.07 (b)	13.44	:
Turkey	:	:	7.47 (b)	7.39	7.71
Iceland	22.67	25.92	25.39 (b)	25.82	27.33
Norway	27.58	30.31	30.21 (b)	29.93	31.06
Switzerland	19.91	22.04	22.07 (b)	22.32	22.84

Appendix 7.

NACE: Total knowledge-intensive services: NACE Rev. 1.1 codes 61, 62, 64 to 67, 70 to 74, 80, 85, and 92

UNIT: Percentage of total employment

TIME / GEO	2000	2005	2006	2007	2008
European Union (EU-27)	30.36 (i)	32.47	32.80	32.96	:
Belgium	37.00	38.38	38.84	38.24	38.50
Bulgaria	21.18	22.15	21.99 (b)	21.66	:
Czech Republic	24.03	25.09	25.07 (b)	25.66	25.63
Denmark	42.13	42.78	43.50 (b)	43.51 (b)	43.91
Germany	30.37	33.75 (b)	34.13 (b)	34.79	35.30
Estonia	26.88 (b)	28.67	28.64 (b)	27.84	28.16
Ireland	31.76	34.02	34.23 (b)	35.48	36.22
Greece	21.76	24.55	24.96 (b)	25.07	25.73
Spain	24.55	26.86 (b)	27.94 (b)	28.19	28.89
France	34.69	36.74	36.97 (b)	36.89	37.04
Italy	26.68	30.17	30.41 (b)	30.67	31.02
Cyprus	25.53	27.21	28.28 (b)	29.20	29.32
Latvia	24.76	25.58	25.48 (b)	24.72	26.81
Lithuania	26.19	25.42	25.58 (b)	25.97	27.14
Luxembourg (Grand...	35.50	41.96	43.49	43.02	45.10
Hungary	26.50	28.22	28.42 (b)	28.20	28.73
Malta	29.72	30.44	30.77 (b)	32.82	32.67
Netherlands	39.21 (b)	41.96	42.02 (b)	42.71	42.66
Austria	28.17	31.09	30.44 (b)	30.00	31.50
Poland	:	24.49	24.66 (b)	24.81	:
Portugal	19.37	22.86	23.08 (b)	23.51	23.79
Romania	11.12	13.89	14.59 (b)	14.40	14.84
Slovenia	22.80	25.28	26.15 (b)	26.27	:
Slovakia	24.48	25.43	24.87 (b)	24.74	24.71
Finland	37.91 (b)	40.53	41.10 (b)	40.73	41.06
Sweden	45.71	47.85 (b)	47.67 (b)	47.83	:
United Kingdom	39.83	42.31	42.91 (b)	42.85	42.74
Croatia	:	21.55	23.03 (b)	23.43 (b)	23.27
Former Yugoslav R...	:	:	18.23 (b)	19.06	:
Turkey	:	:	12.77 (b)	12.92	13.65
Iceland	39.26	43.34	42.54 (b)	44.00	44.88
Norway	42.26	45.52	46.08 (b)	45.98	46.75
Switzerland	36.22	41.21	41.30 (b)	42.16	42.71

Source: Eurostat Data Explorer (http://epp.eurostat.ec.europa.eu/portal/page/portal/statistics/themes)

Appendix 8.

NACE: Total less-knowledge-intensive services: NACE Rev. 1.1 codes 50, 51, 52, 55, 60, 63, 75, 90, 91, 93, 95, and 99
UNIT: Percentage of total employment

TIME / GEO	2000	2005	2006	2007	2008
European Union (EU-27)	33.45 (i)	33.89	33.89	33.77	:
Belgium	34.90	34.90	34.51	35.46	35.05
Bulgaria	33.11	34.75	35.45 (b)	35.31	:
Czech Republic	30.83	31.43	31.17 (b)	30.51	30.48
Denmark	28.96	30.20	30.11 (b)	30.33 (b)	30.66
Germany	33.46	34.16 (b)	33.75 (b)	32.77	32.99
Estonia	31.77 (b)	32.03	32.84 (b)	32.25	32.43
Ireland	31.97	32.40	32.31 (b)	31.88	32.51
Greece	38.28	40.65	41.03 (b)	40.96	41.17
Spain	37.94	38.18 (b)	37.78 (b)	38.14	39.18
France	34.90	35.96	36.32 (b)	36.37	37.23
Italy	36.29	34.87	35.20 (b)	35.19	35.45
Cyprus	45.37	44.19	44.88 (b)	43.90	44.02
Latvia	33.66	36.11	36.52 (b)	36.91	36.69
Lithuania	27.94	31.44	32.32 (b)	32.98	34.41
Luxembourg (Grand...	41.32	39.02	37.99	38.22	37.90
Hungary	33.27	34.44	34.45 (b)	34.54	34.67
Malta	35.50	37.56	38.74 (b)	39.12	39.88
Netherlands	37.49 (b)	35.31	35.54 (b)	34.85	36.67
Austria	35.80	35.88	35.93 (b)	37.09	37.02
Poland	:	28.83	29.21 (b)	29.50	:
Portugal	34.24	35.46	35.39 (b)	35.17	36.38
Romania	18.65	23.37	24.09 (b)	24.66	24.98
Slovenia	30.49	28.99	29.25 (b)	29.45	:
Slovakia	31.35	31.08	31.95 (b)	31.67	31.78
Finland	28.01 (b)	28.74	28.43 (b)	28.56	29.09
Sweden	27.03	27.99 (b)	28.26 (b)	28.35	:
United Kingdom	33.53	34.20	33.74 (b)	33.51	34.39
Croatia	:	32.84	33.73 (b)	33.28 (b)	32.97
Former Yugoslav R...	:	:	29.07 (b)	31.42	:
Turkey	:	:	34.65 (b)	35.25	34.65
Iceland	29.94	28.53	29.64 (b)	29.25	28.01
Norway	31.69	30.34	29.60 (b)	30.01	28.93
Switzerland	35.14	32.65	32.46 (b)	31.53	31.39

Appendix 9. Survey questionnaire in English

Institute for World Economics Hungarian Academy of Sciences	Institute of Economic Research Hitotsubashi University	Institute of Sociology Hungarian Academy of Sciences

Multinationals and Local Resources

Questionnaire

Business Services

2008

Number: ☐☐

I. FIRM AND ITS CONTEXT

1. Name of the firm:_____

Instructions for the interviewer: In the following, the basic data, organizational structure, and activities of the firm are recorded.

2. Address of the firm's headquarters in Hungary:

Postal code	City	Street	Nr.

3. Statistical code of the firm's main activity (NACE, 4 digits): ……

4. Year of establishment of the firm: ☐☐
(if 2000 = 00)

5. Corporate ownership structure of the firm

- 100% foreign-owned enterprise ☐
- Majority foreign-owned enterprise ☐
- 100% domestically owned enterprise ☐
- Majority domestically owned enterprise ☐
- 100% domestically state-owned enterprise ☐
- Majority domestically state-owned enterprise ☐
- Other *(please specify)* ……

6. Is the firm part of a company group?

(A group consists of two or more legally defined enterprises under common ownership. The head office is also part of an enterprise group.)

Yes ☐ No ☐ →→→**IF THE ANSWER IS <u>NO</u>, SKIP TO QUESTION 10.**

In the following, please summarize the main characteristics of the parent firm.

7. In which country is the parent company located? ……

8. Number of employees at the parent company:

Less than 10	☐
10-49	☐
50-249	☐
250-999	☐
1,000-4,999	☐
5,000-9,999	☐
10,000 or more	☐

9. Did the firm have a legal predecessor before 1990? (If more, please indicate only the oldest one.) **(Note: Are the numbers used under question number 9 correct: '10.1, …10.2…' etc.? Please check and change here and elsewhere if appropriate.)**

9.1	No	☐
9.2	Yes, state-owned firm, founded before 1990	☐
9.3	Yes, state-owned firm, founded in or after 1990	☐
9.4	Yes, private firm, founded before 1990	☐
9.5	Yes, private firm, founded in or after 1990	☐
9.6	Other…….	

10. Number of employees:
(Please consider the employees of the firm working at customers' premises and the permanent subcontractors as well.)

Less than 10	☐
10-49	☐
50-249	☐
250-999	☐
1,000-4,999	☐
5,000-9,999	☐
10,000 or more	☐

11. How many organizational levels does the firm have between the CEO and the employees?

☐☐

12. What services does the company provide for its clients in the following fields?

12.1. Accounting, financial services, and legal services

Legal services ☐
Tax consultancy ☐
Financial audit ☐
Accounting ☐
Financial consultancy ☐
Other*(please specify)*……

12.2. Human Resources Management

Employee recruitment, manpower leasing ☐
HR consulting ☐
Training and education ☐
Payroll ☐
Other*(please specify)*……

12.3. Architectural and engineering activities, consulting

Architectural activities ☐
Engineering activities and related technical consulting ☐
Technical testing and analysis ☐
Research and development ☐
Other*(please specify)*……

12.4. IT activities

Sales, implementation of IT systems (hardware, application), and related consultancy ☐
Operating IT systems (hardware, applications) ☐
Software development ☐
Data entry and processing ☐
Web hosting and/or Web development ☐

Web portals, content provision ☐
Other*(please specify)*……

12.5. Advertising, marketing, customer service

Advertising, marketing services ☐
Market research ☐
Management consultancy activities ☐
Customer service, operating call center ☐
Other*(please specify)*……

12.6. Other activities *(please specify)*

……
……

Instructions for the interviewer: The following questions deal with the firm's markets.

13. Market shares of the company from 2005 through 2007…

	Yes, dominantly	**Yes, to a lesser extent**	**No**
13.1 In Hungary	☐	☐	☐
13.2 The post-socialist New EU Members States *(This category includes the following countries: Bulgaria, Czech Republic, Estonia, Croatia, Hungary, Poland, Latvia, Lithuania, Romania, and Slovenia)*	☐	☐	☐
13.3 The EU-15 countries *(This category includes: Austria, Belgium, Denmark, Finland, France, Germany, Greece, Ireland, Italy, Luxembourg, Netherlands, Portugal, Spain, Sweden, and the United Kingdom)*	☐	☐	☐
13.4 Russia, Ukraine, Kazakhstan	☐	☐	☐
13.5 Asia	☐	☐	☐
13.6 North America	☐	☐	☐
13.7 Other *(please specify)* ..... ……	☐	☐	☐

QUESTION 14 IS ASKED ONLY IF THE ANSWER IS YES TO QUESTION 6, E.G., THE FIRM IS PART OF THE COMPANY GROUP.

14. The typical customers of the firm…. (in %)

(Please calculate on the basis of the yearly turnover.)

14.1 are within the company group **. . . . . %**

14.2 are outside of the company group **. . . . . %**

15. The number of the firm's customers:

15.1 One customer ☐

15.2 More customers ☐

Instructions for the interviewer: The following questions deal with the services provided by the company.

16. The scale of services provided by the firm:

16.1 One or two services in one business field ☐

16.2 More services in one business field ☐

16.3 One-two services in more business fields ☐

16.4 More services in more business fields ☐

17. The characteristics of the typical services provided by the firm (in %)

(Please calculate on the basis of the yearly turnover.)

17.1 Tailor-made solutions (e.g., IT: software development or HR: carrier planning) **. . . . . %**

17.2 Standardized services (e.g., IT: packaged software or HR: payroll) **. . . . . %**

18. What is the proportion of the low- and high value-added services within the company's service portfolio?

18.1 Low value-added (e.g., data entry and processing) **…… %**

18.2 High value-added (e.g., software development or consultancy) **…… %**

II. RELATIONS BETWEEN THE HUNGARIAN AND FOREIGN MANAGERS

19. Do foreign managers work at your firm?

Yes ☐ No ☐ →→→IF 'NO,' SKIP TO QUESTION 25.

20. In the last few years, to what extent did your firm rely on the contribution of expatriates? If you do not have precise data, please estimate their number.

Year	Number of foreign managers	Number of local managers	Total
2007			
2003			

21. What countries do the foreign managers come from?

Year	The HQ from the parent firm	From other members of the company group	From other companies	Total
2007				100%
2003				100%

22. Please estimate the number of Hungarian employees who worked at foreign subsidiaries of the company group between 2003 and 2007.

Year	Number of Hungarian managers working abroad
2007	
2003	

23. Nationality of the managing director of the firm:

23.1 Hungarian ☐ 23.2 Expatriate ☐

Instructions for the interviewer: In the following, information about the relationship between your firm and the parent firm will be sought.

24. At your firm, who is responsible for the following business functions? *(Please remark with X.)*

	Expatriate	**Hungarian**
24.1 Finance and accounting		
24.2 Human resources management		
24.3 Production		
24.4 Quality control		
24.5 Sales and marketing		
24.6 Customer service		
24.7 IT		
24.8 Research and development		
24.9 Other (please specify):		

QUESTIONS 25 AND 26 ARE ONLY ASKED IF THE ANSWER IS YES TO QUESTION 6, E.G., THE FIRM IS PART OF A COMPANY GROUP.

25. To what extent do the local managers participate in managing the business processes?

25.1 Implement the standards of the parent firm ☐

25.2 Implement the standards of the parent firm but actively take part in the further development of these standards ☐

25.3 Adapt the standards of the parent firm according to the local needs ☐

25.4 Create its business processes independently while following the parent company's policies ☐

25.5 Create its business processes independently from the parent company's policy ☐

25.6 Implement the standards of the customers (e.g., outsourcing of business processes) ☐

Instructions for the interviewer: In the following, questions about the Human Resources Management (HRM) will be sought.

26. Please evaluate the similarities and differences between the HRM practices of your firm and those of the parent company. Your firm is relying on the following:
(Please mark only one answer.)

26.1 Implement the HRM system of the parent company ☐

26.2 Implement the HRM system of the parent firm with slight adaptation to the local environments ☐

26.3 Create an autonomous HRM system that corresponds to the local needs while consistent with the parent company's HRM practices ☐

26.4 Create an autonomous HRM system using only the local requirements ☐

27. Does your firm have a Board of Directors or a Supervisory Board? ***(If the firm is a unit of a parent company registered in Hungary, please answer in regard to the registered parent company.)***

27.1 There is only a Board of Directors →→→ **SKIP TO QUESTION 29!**

27.2 There are both a Board of Directors and a Supervisory Board

27.3 Neither →→→ **SKIP TO QUESTION 30!**

28. Please estimate the composition of the Supervisory Board by nationality.

	Expatriate	**Hungarian**
28.1 Chairman of the Supervisory Board		
28.2 Number of Supervisory Board members		
28.3 Number of external members of Supervisory Board		
28.4 Number of independent members of Supervisory Board		

29. Please estimate the composition of the Board of Directors by nationality.

	Expatriate	**Hungarian**
29.1 Chair of the Board of Directors		
29.2 Number of board members		
29.3 - of which external members		
29.4 - of which independent members		

III. ORGANIZATIONAL INNOVATIONS WITHIN THE COMPANY

30. From 2005 through 2007, did your firm introduce:

30.1 New **business practices** for organizing work or procedures *(i.e., supply chain management, business re-engineering, lean production, quality management, education/training systems)* ☐

30.2 New **knowledge management systems** to better use or exchange information, knowledge, and skills within your enterprise or to collect and interpret information from outside your enterprise ☐

30.3 New methods of **workplace organization** for distributing responsibilities and decision-making *(i.e., first use of a new system of employee responsibilities, teamwork, decentralization, and integration or de-integration of departments)* ☐

30.4 New methods of organizing **external relations** with other firms or public institutions *(i.e., alliances, partnerships, outsourcing, or sub-contracting)* ☐

31. Does your firm make use of some of the following methods of organizing work?

31.1 Job rotation ☐

31.2 Teamwork ☐

31.3 Systems for collection of employee proposals ☐

31.4 Quality circles/groups ☐

31.5 Cross-occupational working groups ☐

31.6 Project-based work ☐

31.7 Benchmarking ☐

31.8 Flat organization ☐

31.9 Quality Control System (e.g., ISO, TQM) ☐

32. If your firm did not introduce organizational innovations from 2005 through 2007, how important were the following factors? *(Please evaluate the following reasons on a 5-point scale, 5 indicating very important, and 1, not at all important.)*

32.1 Introduction of organizational innovations before 2005; no need for further changes	1	2	3	4	5
32.2 Lack of funds to implement organizational innovations	1	2	3	4	5
32.3 Lack of knowledge or qualified staff	1	2	3	4	5
32.4 Employees or management resistant to organizational change	1	2	3	4	5
32.5 No need for organizational innovation from 2005 through 2007	1	2	3	4	5
32.6. Other reasons *(please specify)*: ……	1	2	3	4	5

QUESTION 33 IS ASKED ONLY IF THE ANSWER IS YES TO QUESTION 31.2, E.G., THE FIRM PRACTICES TEAMWORK.

33. If your firm practices teamwork, please describe it. The team members decide about…

	Yes	**No**	**Do not know**	**No answer**
33.1 - ...division of the tasks	1	2	8	9
33.2 - ...the selection of the team leader	1	2	8	9

34. During the adaptation of companies to market requirements, from time to time, it is necessary to initiate organizational changes. At your firm, what are the drivers of the organizational changes? *(Please evaluate the following reasons on a 5-point scale, 5 indicating very characteristic, and 1, not at all characteristic.)*

34.1	Improvement of the effectiveness of daily work	1	2	3	4	5
34.2	Strengthening of the cooperation and coordination within the organization	1	2	3	4	5
34.3	Adapting to environmental changes	1	2	3	4	5
34.4	Continuous renewal of products/services	1	2	3	4	5
34.5	Continuous renewal of knowledge and know-how	1	2	3	4	5
34.6	Outsourcing activities	1	2	3	4	5
34.7	Improvement of the quality and customer service	1	2	3	4	5
34.8	Increase of the firm size	1	2	3	4	5
34.9	Other *(please specify.)* .....……..... ……	1	2	3	4	5
34.10	No organisational changes					

35. Please assess, on a 5-point scale, the intensity of competition with other subsidiaries of the company group (if applicable) or with your competitors on the market (if there are any). *(Please evaluate the forms of competition on a 5-point scale, 5 indicating that competition is very intensive, and 1, not at all intensive.)*

QUESTION 35.1 SHOULD ONLY BE ASKED IF THE ANSWER IS YES TO QUESTION 6, E.G., THE FIRM IS PART OF A CONCERN/GROUP.

		No competition at all	⟷			Very intensive competition
35.1	Competition between the subsidiaries	1	2	3	4	5
35.2	Market competition	1	2	3	4	5

36. In comparison with your competitors, how important are the following factors that influence the performance of your firm? *(Please rate on a 5-point scale, 5 indicating very important, and 1, not at all important.)*

36.1	Prices	1	2	3	4	5
36.2	Customer orientation	1	2	3	4	5
36.3	Quality	1	2	3	4	5
36.4	Respecting deadlines and flexibility	1	2	3	4	5
36.5	Versatility of products/services	1	2	3	4	5
36.6	Image and brand of the firm	1	2	3	4	5
36.7	Continuous product/service development	1	2	3	4	5
36.8	Skilled labor	1	2	3	4	5
36.9	Experiences	1	2	3	4	5
36.10	Reliability	1	2	3	4	5
36.11	Lobbying					
36.12	Other *(please specify)*…..……	1	2	3	4	5

37. It is well-known that ICT plays a significant role in the operation of firms. Please estimate the extent of ICT use on the following areas.

37.1 Information processing/communication (e.g., external/internal communication) . . . . . **%**

37.2 Greater flexibility in production and knowledge use . . . . . **%**

37.3 Continuous development of products/services . . . . . **%**

IV. WORK ORGANIZATION AND KNOWLEDGE USE

38. Which characteristics of human resources are important for the improvement of the firm's performance? *(Please assess the following reasons on a 5-point scale, 5 indicating very important, and 1, not at all important!)*

38.1 Professional-technical knowledge	1	2	3	4	5
38.2 Experience and competence	1	2	3	4	5
38.3 Managerial-organizational skill	1	2	3	4	5
38.4 Customer orientation	1	2	3	4	5
38.5 Creativity, innovative skills	1	2	3	4	5
38.6 Ability to cooperate	1	2	3	4	5
38.7 Language skills	1	2	3	4	5
38.8 Problem-solving ability	1	2	3	4	5
38.9 General IT skills	1	2	3	4	5
38.10 Communications skills	1	2	3	4	5
38.11 Punctuality and reliability	1	2	3	4	5
38.12 Other *(please specify)*……	1	2	3	4	5

39. Please estimate the share of employees with a university or college degree.

The ratio of employees with a degree: …… **%**

40. What attention is devoted by the management to the continuous skill development of employees? *(Please use the following 5-point scale, 5 indicating very important, and 1, not at all important.)*

40.1	On-the-job training	1	2	3	4	5
40.2	Consultation with managers/other employees	1	2	3	4	5
40.3	Job rotation	1	2	3	4	5
40.4	Teamwork	1	2	3	4	5
40.5	Supporting cooperation between various organizational units	1	2	3	4	5
40.6	Participation in formal trainings	1	2	3	4	5
40.7	Training tailored to the needs of the firm *(e.g., language courses, further professional training)*	1	2	3	4	5
40.8	Visiting exhibitions and fairs	1	2	3	4	5

41. Please estimate the ratio of employees participating in various training courses organized and financed by the firm.

		%
41.1	Training organized and financed by the firm *(e.g., language courses, further professional training)*	……
41.2	Training initiated by the employee but financed by the employer *(e.g., external training, participation at conferences)*	……
41.3	Training not financed by the employer but supported with reduced working time *(e.g., second degree/diploma)*	……

42. What kind of training courses are organized and financed by the employer? (Please select only one.)

42.1 EXCLUSIVELY work-related skills (e.g., quality assurance, professional skill development)

42.2 EXCLUSIVELY generic skills (e.g., language, communication skills)

42.3 BOTH generic and work-related skills

43. Organizational knowledge can be developed by the use of external partner experiences. To what extent does your firm rely on the following groups in developing organizational knowledge? (Please indicate the appropriate partners with X.)

		Regularly	Occasionally	Never
43.1	Customers			
43.2	Various suppliers (e.g., parts, services)			
43.3	Consulting firms			
43.4	Higher-education institutions			
43.5	Other educational training agencies			
43.6	Research institutes			
43.7	Development agencies			
43.8	Other professional and labor market organizations			

44. Code of the interviewer: ……

45. Name of the interviewee…….

46. Phone number of the interviewee (with area code)…….

47. Date of interview: ..... (dd/mm/yy)

General comments of the interviewer:

Signature of the interviewer

……..……..…….

ADDITIONAL QUESTIONS ABOUT WORKING TIME FLEXIBILITY

31.1 Does your firm make use of the following flexible work and working time systems? *(You can choose more than one answer!)*

For the interviewees:

TELEWORKING: Working from outside of the workplace using info-communication tools, (PC, phone, fax, modem, Internet, teleconferencing, e-mail, etc.). *MOBILE WORK: Working in places other than home or company's/ organization's premises, e.g., client's premises, on the road.*

31.1.1 Teleworking from home, once a week ☐

31.1.2 Teleworking from home, several times a week ☐

31.1.3 Mobile work ☐

31.1.4 Part-time work ☐

31.1.5 Flexible working time ☐

31.2 Is your firm planning to introduce these methods in the near future? *(You can choose more than one answer!)*

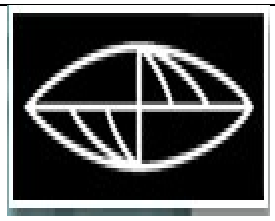
31.2.1 Teleworking from home, once a week ☐

31.2.2 Teleworking from home, several times a week ☐

31.2.3 Mobile work ☐

31.2.4 Part-time work ☐

31.2.5 Flexible working time ☐

		
Institute for World Economics Hungarian Academy of Sciences	Institute of Economic Research Hitotsubashi University	Institute of Sociology Hungarian Academy of Sciences

Multinationals and Local Resources

Questionnaire

Manufacturing

2008

Number: ☐☐

I. FIRM AND ITS CONTEXT

1. Name of the firm:_____

Instructions for the interviewer: In the following, the basic data, organizational structure, and activities of the firm are recorded.

2. Address of the firm's headquarters in Hungary

Postal code	City	Street	Nr.

3. Statistical code of the firm's main activity (NACE, 4 digits): ……

4. Year of establishment of the firm: ☐☐
(if 2000 = 00)

5. Corporate ownership structure of the firm

100% foreign-owned enterprise ☐
Majority foreign-owned enterprise ☐
100% domestically owned enterprise ☐
Majority domestically owned enterprise ☐
100% domestically state-owned enterprise ☐
Majority domestically state-owned enterprise ☐
Other *(please specify)* ……

6. Is the firm part of a company group?

(A group consists of two or more legally defined enterprises under common ownership. The head office is also part of an enterprise group.)

Yes ☐ No ☐ →→→**IF THE ANSWER IS <u>NO</u>, SKIP TO QUESTION 10.**

In the following, please summarize the main characteristics of the parent firm.

7. In which country is the parent company locate?

8. Number of employees at the parent company:

Less than 10	☐
10-49	☐
50-249	☐
250-999	☐
1,000-4,999	☐
5,000-9,999	☐
10,000 or more	☐

9. Did the firm have a legal predecessor before 1990? (If more, please indicate only the oldest one.)

9.1	No	☐
9.2	Yes, state-owned firm, founded before 1990	☐
9.3	Yes, state-owned firm, founded in or after 1990	☐
9.4	Yes, private firm, founded before 1990	☐
9.5	Yes, private firm, founded in or after 1990	☐
9.6	Other…….	

10. Number of employees:
(Please consider the employees of the firm working at customers' premises and the permanent subcontractors as well.)

Less than 10	☐
10-49	☐
50-249	☐
250-999	☐
1,000-4,999	☐
5,000-9,999	☐
10,000 or more	☐

11. How many organizational levels does the firm have between the CEO and the employees?

☐☐

Instructions for the interviewer: The following questions deal with the firm's markets.

12. Market shares of the company from 2005 through 2007…

	Yes, dominantly	**Yes, to lesser extent**	**No**
12.1 In Hungary	☐	☐	☐
12.2 The post-socialist New EU Members States *(This category includes the following countries: Bulgaria, Czech Republic, Estonia, Croatia, Hungary, Poland, Latvia, Lithuania, Romania, and Slovenia)*	☐	☐	☐
12.3 The EU-15 countries *(This category includes: Austria, Belgium, Denmark, Finland, France, Germany, Greece, Ireland, Italy, Luxembourg, Netherlands, Portugal, Spain, Sweden, and the United Kingdom)*	☐	☐	☐
12.4 Russia, Ukraine, Kazakhstan	☐	☐	☐
12.5 Asia	☐	☐	☐
12.6 North America	☐	☐	☐
12.7 Other *(please specify)* ..... ……	☐	☐	☐

QUESTION 13 IS ASKED ONLY IF THE ANSWER IS YES TO QUESTION 6, E.G., THE FIRM IS PART OF THE COMPANY GROUP.

13. The typical customers of the firm…. (in %)

(Please calculate on the basis of the yearly turnover.)

13.1 are within the company group . . . . . **%**

13.2 are outside of the company group . . . . . **%**

14. The number of the firm's customers:

14.1 One customer ☐

14.2 More customers ☐

Instructions for the interviewer: The following questions deal with the products manufactured by the firm.

15. The rate of change of products manufactured by the firm is (please mark only one item):

15.1 Non-changing ☐

15.2 Slowly changing ☐

15.3 Fast changing ☐

16. The volume of the products manufactured and distributed by the firm is (in %):
(Please calculate on the basis of the yearly turnover.)

16.1 Individual product . . . . . **%**

16.2 Mass product . . . . . **%**

17. The level of technology used by the firm compared to the period before 2005 is:

17.1 The same ☐

17.2 Improved ☐

17.3 Completely new ☐

18. The level of technology used by the firm compared to its competitors is:

18.1 Older than the technology used by the competitors ☐

18.2 Similar to the technology used by the competitors ☐

18.3 More developed than the technology used by the competitors ☐

18.4 Internationally ‘leading edge’ technology ☐

II. RELATIONS BETWEEN THE HUNGARIAN AND FOREIGN MANAGERS

19. Do foreign managers work at your firm?

Yes ☐ No ☐ →→→IF 'NO,' SKIP TO QUESTION 25.

20. In the last few years, to what extent did your firm rely on the contribution of expatriates? If you do not have precise data, please estimate their number.

Year	Number of foreign managers	Number of local managers	Total
2007			
2003			

21. What countries do the foreign managers come from?

Year	The HQ from the parent firm	From other members of the company group	From other companies	Total
2007				100%
2003				100%

22. Please estimate the number of Hungarian employees who worked at foreign subsidiaries of the company group between 2003 and 2007.

Year	Number of Hungarian managers working abroad
2007	
2003	

23. Nationality of the managing director of the firm:

23.1 Hungarian ☐ 23.2 Expatriate ☐

Instructions for the interviewer: In the following, information about the relationship between your firm and the parent firm will be sought.

24. At your firm, who is responsible for the following business functions? *(Please remark with X.)*

	Expatriate	Hungarian
24.1 Finance and accounting		
24.2 Human resources management		
24.3 Production		
24.4 Quality control		
24.5 Sales and marketing		
24.6 Customer service		
24.7 IT		
24.8 Research and development		
24.9 Other (please specify):		

QUESTIONS 25 AND 26 ARE ONLY ASKED IF THE ANSWER IS YES TO QUESTION 6, E.G., THE FIRM IS PART OF A COMPANY GROUP.

25. To what extent do the local managers participate in managing the business processes?

25.1 Implement the standards of the parent firm ☐

25.2 Implement the standards of the parent firm but actively take part in the further development of these standards ☐

25.3 Adapt the standards of the parent firm according to the local needs ☐

25.4 Create its business processes independently while following the parent company's policies ☐

25.5 Create its business processes independently from the parent company's policy ☐

25.6 Implement the standards of the customers (e.g., outsourcing of business processes) ☐

Instructions for the interviewer: In the following, questions about the Human Resources Management (HRM) will be sought.

26. Please evaluate the similarities and differences between the HRM practices of your firm and those of the parent company. Your firm is relying on the following:
(Please mark only one answer.)

26.1 Implement the HRM system of the parent company ☐

26.2 Implement the HRM system of the parent firm with slight adaptation to the local environments ☐

26.3 Create an autonomous HRM system that corresponds to the local needs while consistent with the parent company's HRM practices ☐

26.4 Create an autonomous HRM system using only the local requirements ☐

27. Does your firm have a Board of Directors or a Supervisory Board? ***(If the firm is a unit of a parent company registered in Hungary, please answer in regard to the registered parent company.)***

27.1 There is only a Board of Directors →→→ **SKIP TO QUESTION 29!**

27.2 There are both a Board of Directors and a Supervisory Board

27.3 Neither →→→ **SKIP TO QUESTION 30!**

28. Please estimate the composition of the Supervisory Board by nationality.

	Expatriate	**Hungarian**
28.1 Chairman of the Supervisory Board		
28.2 Number of Supervisory Board members		
28.3 - of which external members		
28.4 - of which independent members		

29. Please estimate the composition of the Board of Directors by nationality.

	Expatriate	**Hungarian**
29.1 Chair of the Board of Directors		
29.2 Number of board members		
29.3 - of which external members		
29.4 - of which independent members		

III. ORGANIZATIONAL INNOVATIONS WITHIN THE COMPANY

30. From 2005 through 2007, did your firm introduce:

30.1 New **business practices** for organizing work or procedures *(i.e., supply chain management, business re-engineering, lean production, quality management, education/training systems)* ☐

30.2 New **knowledge management systems** to better use or exchange information, knowledge, and skills within your enterprise or to collect and interpret information from outside your enterprise ☐

30.3 New methods of **workplace organization** for distributing responsibilities and decision-making *(i.e., first use of a new system of employee responsibilities, teamwork, decentralization, and integration or de-integration of departments)* ☐

30.4 New methods of organizing **external relations** with other firms or public institutions *(i.e., alliances, partnerships, outsourcing, or sub-contracting)* ☐

31. Does your firm make use of some of the following methods of organizing work?

31.1	Job rotation	☐
31.2	Teamwork	☐
31.3	Systems for collection of employee proposals	☐
31.4	Quality circles/groups	☐
31.5	Cross-occupational working groups	☐
31.6	Project-based work	☐
31.7	Benchmarking	☐
31.8	Flat organization	☐
31.9	Quality Control System (e.g., ISO, TQM)	☐

32. If your firm did not introduce organizational innovations from 2005 through 2007, how important were the following factors? *(Please evaluate the following reasons on a 5-point scale, 5 indicating very important, and 1, not at all important.)*

32.1 Introduction of organizational innovations before 2005; no need for further changes	1	2	3	4	5
32.2 Lack of funds to implement organizational innovations	1	2	3	4	5
32.3 Lack of knowledge or qualified staff	1	2	3	4	5
32.4 Employees or management resistant to organizational change	1	2	3	4	5
32.5 No need for organizational innovation from 2005 through 2007	1	2	3	4	5
32.6. Other reasons *(please specify)*: ……	1	2	3	4	5

QUESTION 33 IS ASKED ONLY IF THE ANSWER IS YES TO QUESTION 31.2, E.G., THE FIRM PRACTICES TEAMWORK!

33. If your firm practices teamwork, please describe it. The team members decide about…

	Yes	**No**	**Do not know**	**No answer**
33.1 - ...division of the tasks	1	2	8	9
33.2 - ...the selection of the team leader	1	2	8	9

34. During the adaptation of companies to market requirements, from time to time, it is necessary to initiate organizational changes. At your firm, what are the drivers of the organizational changes? *(Please evaluate the following reasons on a 5-point scale, 5 indicating very characteristic, and 1, not at all characteristic.)*

34.1	Improvement of the effectiveness of daily work	1	2	3	4	5
34.2	Strengthening of the cooperation and coordination within the organization	1	2	3	4	5
34.3	Adapting to environmental changes	1	2	3	4	5
34.4	Continuous renewal of products/services	1	2	3	4	5
34.5	Continuous renewal of knowledge and know-how	1	2	3	4	5
34.6	Outsourcing activities	1	2	3	4	5
34.7	Improvement of the quality and customer service	1	2	3	4	5
34.8	Increase of the firm size	1	2	3	4	5
34.9	Other *(please specify.)* .....……	1	2	3	4	5
34.10	No organisational changes					

35. Please assess, on a 5-point scale, the intensity of competition with other subsidiaries of the company group (if applicable) or with your competitors on the market (if there are any). *(Please evaluate the forms of competition on a 5-point scale, 5 indicating that competition is very intensive, and 1, not at all intensive.)*

QUESTION 35.1 SHOULD ONLY BE ASKED IF THE ANSWER IS YES TO QUESTION 6, E.G., THE FIRM IS PART OF A CONCERN/GROUP.

		No competition at all	⟷			Very intensive competition
35.1	Competition between the subsidiaries	1	2	3	4	5
35.2	Market competition	1	2	3	4	5

36. In comparison with your competitors, how important are the following factors that influence the performance of your firm? *(Please rate on a 5-point scale, 5 indicating very important, and 1, not at all important.)*

36.1	Prices	1	2	3	4	5
36.2	Customer orientation	1	2	3	4	5
36.3	Quality	1	2	3	4	5
36.4	Respecting deadlines and flexibility	1	2	3	4	5
36.5	Versatility of products/services	1	2	3	4	5
36.6	Image and brand of the firm	1	2	3	4	5
36.7	Continuous product/service development	1	2	3	4	5
36.8	Skilled labor	1	2	3	4	5
36.9	Experiences	1	2	3	4	5
36.10	Reliability	1	2	3	4	5
36.11	Lobbying					
36.12	Other *(please specify)*…..……	1	2	3	4	5

37. It is well-known that ICT plays a significant role in the operation of firms. Please estimate the extent of ICT use on the following areas.

37.1 Information processing/communication (e.g., external/internal communication)

. . . . . %

37.2 Greater flexibility in production and knowledge use **. . . . . %**

37.3 Continuous development of products/services **. . . . . %**

IV. WORK ORGANIZATION AND KNOWLEDGE USE

38. Which characteristics of human resources are important for the improvement of the firm's performance? *(Please assess the following reasons on a 5-point scale, 5 indicating very important, and 1, not at all important!)*

38.1 Professional-technical knowledge	1	2	3	4	5
38.2 Experience and competence	1	2	3	4	5
38.3 Managerial-organizational skill	1	2	3	4	5
38.4 Customer orientation	1	2	3	4	5
38.5 Creativity, innovative skills	1	2	3	4	5
38.6 Ability to cooperate	1	2	3	4	5
38.7 Language skills	1	2	3	4	5
38.8 Problem-solving ability	1	2	3	4	5
38.9 General IT skills	1	2	3	4	5
38.10 Communications skills	1	2	3	4	5
38.11 Punctuality and reliability	1	2	3	4	5
38.12 Other *(please specify)*……	1	2	3	4	5

39. Please estimate the share of employees with a university or college degree.

The ratio of employees with a degree: …… **%**

40. What attention is devoted by the management to the continuous skill development of employees? *(Please use the following 5-point scale, 5 indicating very important, and 1, not at all important.)*

40.1	On-the-job training	1	2	3	4	5
40.2	Consultation with managers/other employees	1	2	3	4	5
40.3	Job rotation	1	2	3	4	5
40.4	Teamwork	1	2	3	4	5
40.5	Supporting cooperation between various organizational units	1	2	3	4	5
40.6	Participation in formal trainings	1	2	3	4	5
40.7	Training tailored to the needs of the firm *(e.g., language courses, further professional training)*	1	2	3	4	5
40.8	Visiting exhibitions and fairs	1	2	3	4	5

41. Please estimate the ratio of employees participating in various training courses organized and financed by the firm.

		%
41.1	Training organized and financed by the firm *(e.g., language courses, further professional training)*	……
41.2	Training initiated by the employee but financed by the employer *(e.g., external training, participation at conferences)*	……
41.3	Training not financed by the employer but supported with reduced working time *(e.g., second degree/diploma)*	……

42. What kind of training courses are organized and financed by the employer? (Please select only one.)

42.1 EXCLUSIVELY work-related skills (e.g., quality assurance, professional skill development)

42.2 EXCLUSIVELY generic skills (e.g., language, communication skills)

42.3 BOTH generic and work-related skills

43. Organizational knowledge can be developed by the use of external partner experiences. To what extent does your firm rely on the following groups in developing organizational knowledge? (Please indicate the appropriate partners with X.)

		Regularly	Occasionally	Never
43.1	Customers			
43.2	Various suppliers (e.g., parts, services)			
43.3	Consulting firms			
43.4	Higher-education institutions			
43.5	Other educational training agencies			
43.6	Research institutes			
43.7	Development agencies			
43.8	Other professional and labor market organizations			

44. Code of the interviewer: ……

45. Name of the interviewee…….

46. Phone number of the interviewee (with area code)…….

47. Date of interview: ..... (dd/mm/yy)

General comments of the interviewer:

Signature of the interviewer

Appendix 10. Survey questionnaire in Slovak

Institute for World Economics Hungarian Academy of Sciences	Institute of Economic Research Hitotsubashi University	Institute of Sociology Hungarian Academy of Sciences

Nadnárodné spoločnosti a miestne zdroje

Dotazník

Podnikové služby

FAKULTA MANAGEMENTU

UNIVERZITA KOMENSKÉHO

BRATISLAVA

2008

Číslo: ☐☐

I. PODNIK V KONTEXTE

1. Názov podniku:

Inštrukcie pre anketára: Nasledujúca časť obsahuje základné údaje o podniku, jeho organizačnej štruktúre a činnosti/činnostiach.

2. Adresa sídla podniku na Slovensku

PSČ	Mesto	Ulica	č.

3. Štatistický kód základnej činnosti podniku (SKNACE – kód štatisickej klasifikácie ekonomických činností, štvorčíslie):

4. Rok založenia podniku: ☐☐
(ak 2000 = 00)

5. Štruktúra vlastníctva podniku

podnik so 100%-nou zahraničnou účasťou ☐
podnik s väčšinovou zahraničnou účasťou ☐
podnik so 100%-nou domácou účasťou ☐
podnik s väčšinovou domácou účasťou ☐
podnik so 100%-nou domácou účasťou štátu ☐
podnik s väčšinovou domácou účasťou štátu ☐

Iné *(uveďte):* ……

6. Je váš podnik súčasťou koncernu/skupiny?

(Skupina pozostáva z dvoch alebo viacerých právne vymedzených podnikov v jednom spoločnom vlastníctve. Vedenie podniku je súčasťou tejto skupiny.)

Áno ☐ Nie ☐ →→→ **AK JE ODPOVEĎ NIE, PREJDITE NA OTÁZKU 10**

V nasledujúcej časti uveďte hlavné charakteristiky materského podniku.

7. V ktorom štáte sídli materský podnik?

8. Počet zamestnancov podniku:

- Menej ako 10 ☐
- 10-49 ☐
- 50-249 ☐
- 250-999 ☐
- 1.000-4.999 ☐
- 5.000-9.999 ☐
- 10.000 a viac ☐

9. Mal váš podnik pred rokom 1990 právne vymedzeného predchodcu? (Ak ich bolo viac, prosím, uveďte údaje len o najstaršom z nich.)

9.1 Nie ☐
9.2 Áno, podnik v štátnom vlastníctve založený pred rokom 1990 ☐
9.3 Áno, podnik v štátnom vlastníctve v roku 1990 alebo neskôr ☐
9.4 Áno, podnik v súkromnom vlastníctve, založený pred rokom 1990 ☐
9.5 Áno, podnik v súkromnom vlastníctve založený v roku 1990 alebo neskôr ☐
9.6 Iné *(uveďte):*…….

10. Počet zamestnancov:
(Do počtu zahrňte aj zamestnancov pracujúcich u zákazníkov ako aj zamestnancov na čiastočný pracovný úväzok)

- Menej ako 10 ☐
- 10-49 ☐
- 50-249 ☐
- 250-999 ☐
- 1.000-4.999 ☐
- 5.000-9.999 ☐
- 10.000 a viac ☐

11. Koľko úrovní riadenia obsahuje organizačná štruktúra medzi vrcholovým vedením a radovými zamestnancami?

☐☐

12. Ktoré služby poskytuje váš podnik klientom?

12.1. Účtovníctvo, finančné služby, právne služby

Právne služby ☐
Daňové poradenstvo ☐
Finančný audit ☐
Účtovníctvo ☐
Finančné poradenstvo ☐

Iné *(uveďte):*……

12.2. Riadenie ľudských zdrojov

Nábor pracovníkov, personálny lízing ☐
Poradenstvo v oblasti riadenia ľudských zdrojov ☐
Školenia a vzdelávanie ☐
Mzdy ☐

Iné *(uveďte):*……

12.3. Architektonické a technické služby, poradenstvo

Architektonické služby ☐
Technické služby a s nimi súvisiace technické poradenstvo ☐
Technické testovanie a analýzy ☐
Výskum a vývoj ☐

Iné *(uveďte):*……

12.4 Informačné technológie

Predaj, zavádzanie informačných technológií (hardvér, aplikácie) a s tým súvisiace poradenstvo ☐

Operačné systémy (hardvér, aplikácie) ☐

Vývoj softvéru ☐

Zber a spracovanie dát ☐

Web-hosting a/alebo vývoj webových stránok ☐

Webové portály, správa obsahu ☐

Iné *(uveďte):*……

12.5. Reklama, marketing, služby zákazníkom

Reklama, marketingové služby ☐

Výskum trhu ☐

Manažérsky servis ☐

Služby zákazníkom, služby call-centra ☐

Iné *(uveďte):*……

12.6 Iné činnosti *(uveďte):*

……

Inštrukcia pre anketára: Nasledujúca časť dotazníka zhromažďuje údaje o trhoch podniku.

13. Trhový podiel podniku v období 2005 – 2007 bol

	Áno, dominantný	**Áno, v menšom rozsahu**	**Nie**
13.1 Na Slovensku	☐	☐	☐
13.2 V post-socialistických štátoch – t.j. v nových členských štátoch EÚ *(Táto kategória zahŕňa nasledovné štáty: Bulharsko, Česká republika, Estónsko, Chorvátsko, Maďarsko, Poľsko, Lotyšsko, Litva, Rumunsko, Slovinsko)*	☐	☐	☐
13.3 V 15 štátoch EÚ *(Táto kategória zahŕňa nasledovné štáty: Rakúsko, Belgicko, Dánsko, Fínsko, Francúzsko, Nemecko, Grécko, Írsko, Taliansko, Luxembursko, Holandsko, Portugalsko, Španielsko, Švédsko, Veľká Británia)*	☐	☐	☐
13.4 Rusko, Ukrajina, Kazachstan	☐	☐	☐
13.5 Ázia	☐	☐	☐
13.6 Severná Amerika	☐	☐	☐
13.7 Iné *(uveďte):* ……	☐	☐	☐

ODPOVEĎ NA OTÁZKU Č. 14 UVEĎTE LEN V PRÍPADE, AK BOLA ODPOVEĎ NA OTÁZKU Č. 6 ÁNO, NAPR. PODNIK JE SÚČASŤOU SKUPINY.

14. Typickí zákazníci podniku (v %)

(Vypočítajte na základe ročného obratu.)

14.1 sú v rámci skupiny . . . . . **%**

14.2 sú mimo skupiny . . . . . **%**

15. Počet zákazníkov podniku:

15.1 Jeden zákazník ☐

15.2 Viac zákazníkov ☐

Inštrukcia pre anketára: Nasledujúca časť dotazníka zhromažďuje údaje o službách, ktoré podnik poskytuje.

16. Rozsah služieb, ktoré podnik poskytuje:

16.1 Jedna - dve služby v jednej oblasti podnikania ☐

16.2 Viac služieb v jednej oblasti podnikania ☐

16.3 Jedna - dve služby vo viacerých oblastiach podnikania ☐

16.4 Viac služieb vo viacerých oblastiach podnikania ☐

17. Charakteristika typických služieb poskytovaných podnikom (v %)

(Vypočítajte na základe ročného obratu.)

17.1 Riešenia 'šité na mieru' (napr. IT: vývoj softvéru, Ľudské zdroje: plánovanie kariéry) **……%**

17.2 Štandardné služby (napr. IT: softvérový balík, Ľudské zdroje: mzdy) **……%**

18. Aký je podiel služieb s nízkou a vysokou pridanou hodnotou v rámci portfólia služieb poskytovaným podnikom?

18.1 Nízka pridaná hodnota (napr. zber a spracovanie dát) **…… %**

18.2 Vysoká pridaná hodnota (napr. vývoj softvéru alebo poradenstvo) **..... %**

II. VZŤAHY MEDZI SLOVENSKÝMI A ZAHRANIČNÝMI MANAŽÉRMI

19. Pracujú vo vašom podniku zahraniční manažéri?

Áno ☐ Nie x ☐ →→→ **AK 'NIE', PREJDITE NA OTÁZKU 25.**

20. V akom rozsahu sa váš podnik v poslednom čase spoliehal na prínos zahraničných manažérov? Ak nemáte presné údaje, prosím, odhadnite ich počet.

Rok	Počet zahraničných manažérov	Počet domácich manažérov	Spolu
2007			
2003			

21. Odkiaľ pochádzajú zahraniční manažéri vo vašom podniku?

Rok	Z vedenia materského podniku	Z iných podnikov skupiny	Z iných podnikov	Spolu
2007				
2003				

22. Odhadnite, prosím, koľko slovenských zamestnancov pracovalo v rokoch 2003 – 2007 v zahraničných pobočkách koncernu/skupiny, kam patrí váš podnik?

Rok	Počet slovenských manažérov pracujúcich v zahraničí
2007	
2003	

23. Štátna príslušnosť riadiaceho pracovníka podniku:

23.1 Slovenská ☐ 23.2 Štát materského podniku ☐

Inštrukcia pre anketára: Nasledujúca časť dotazníka zhromažďuje údaje o vzťahu vášho podniku a materského podniku.

24. Kto je vo vašom podniku zodpovedný za nasledovné funkcie? *(Prosím, označte X)*

	Zahraničný pracovník	**Slovák**
24.1 Financie a účtovníctvo		
24.2 Manažment ľudských zdrojov		
24.3 Výroba		
24.4 Kontrola kvality		
24.5 Predaj a marketing		
24.6 Služby zákazníkom		
24.7 Informačné technológie		
24.8 Výskum a vývoj		
24.9 Iné (uveďte):		

OTÁZKY 25 A 26 KLADIEME, LEN AK ODPOVEĎ NA OTÁZKU 6 BOLA ÁNO, NAPRÍKLAD PODNIK JE SÚČASŤOU SKUPINY.

25. V akom rozsahu sa domáci manažéri zúčastňujú na riadení podnikových procesov?

25.1 Implementujú štandardy materského podniku ☐

25.2 Implementujú štandardy materského podniku, ale aktívne sa zúčastňujú na ďalšom rozvoji týchto štandardov ☐

25.3 Prispôsobujú štandardy materského podniku miestnym potrebám ☐

25.4 Samostatne vytvárajú vlastné podnikové procesy, ale dodržiavajú zásady materského podniku ☐

25.5 Vytvárajú vlastné podnikové procesy nezávisle od zásad materského podniku ☐

25.5 Implementujú štandardy zákazníkov (napríklad outsourcing podnikových procesov) ☐

Inštrukcia pre anketára: Nasledujúca časť obsahuje otázky zamerané na manažment ľudských zdrojov.

26. Prosím, zhodnoťte podobnosti a rozdiely medzi praxou manažmentu ľudských zdrojov vášho podniku a postupmi materského podniku. Váš podnik sa spolieha na: (Prosím, označte iba jednu odpoveď.)

26.1 zavádzanie systému manažmentu ľudských zdrojov materského podniku ☐

26.2 zavádzanie systému manažmentu ľudských zdrojov materského podniku, ale mierne ho prispôsobuje miestnym podmienkam ☐

26.3 vytváranie autonómneho systému manažmentu ľudských zdrojov zohľadňujúceho miestne potreby, ktorý je však v súlade s uplatňovaní postupov manažmentu ľudských zdrojov materského podniku ☐

26.4 vytváranie autonómneho systému manažmentu ľudských zdrojov zohľadňujúceho výlučne miestne požiadavky ☐

27. Existuje vo vašom podniku správna rada alebo dozorná rada? ***(Ak je podnik útvarom materského podniku registrovaného na Slovensku, odpovedajte prosím, za registrovaný materský podnik.)***

27.1 Existuje iba správna rada →→→ **PREJDITE NA OTÁZKU 29**

27.2 Existujú obe, správna rada aj dozorná rada

27.3 Neexistuje ani jedna z nich →→→ **PREJDITE NA OTÁZKU 30**

28. Uveďte zloženie dozornej rady podľa štátnej príslušnosti.

	Cudzí štátny príslušník	**Slovák**
28.1 Predseda dozornej rady		
28.2 Počet členov dozornej rady		
28.3 - z toho externí členovia		
28.4 - z toho nezávislí členovia		

29. Uveďte zloženie správnej rady podľa štátnej príslušnosti.

	Cudzí štátny príslušník	**Slovák**
29.1 Predseda správnej rady		
29.2 Počet členov správnej rady		
29.3 - z toho externí členovia		
29.4 - z toho nezávislí členovia		

III. ORGANIZAČNÉ INOVÁCIE V PODNIKU

30. V období rokov 2005 až 2007, váš podnik predstavil:

30.1 nové **podnikové postupy** pre organizovanie práce alebo procesov *(t.j. manažment zásobovania, podnikový re-inžiniering, štíhla výroba, manažment kvality, systém vzdelávania/školení atď.).* ☐

30.2 nový **systém znalostného manažmentu** pre lepšie využitie a výmenu informácií, znalostí a zručností v rámci podniku, alebo na zber a interpretáciu informácií z externého prostredia vášho podniku. ☐

30.3 nové metódy **organizácie pracovného miesta** na rozdelenie zodpovedností a rozhodovania *(t.j. prvé využitie nového systému zodpovednosti zamestnancov, tímová práca, decentralizácia, integrácia alebo de-integrácia oddelení atď.)* ☐

30.4 nové metódy organizovania **externých vzťahov** s inými firmami alebo verejnými inštitúciami (*t.j. aliancie, partnerstvá, outsourcing alebo zmluvná spolupráca atď.).* ☐

31. Využíva váš podnik niektorú z nasledovných metód organizácie práce?

31.1 Rotácia na pracovisku ☐

31.2 Tímová práca ☐

31.3 Systém zberu zamestnaneckých návrhov ☐

31.4 Krúžky/skupiny kvality ☐

31.5 Pracovné skupiny pozostávajúce z členov z viacerých odborov ☐

31.6 Práca na základe projektov ☐

31.7 Benchmarking ☐

31.8 Ploché usporiadanie ☐

31.9 Systém kontroly kvality (napr. ISO, TQM) ☐

32. Využíva váš podnik nasledovné formy flexibilnej organizácie práce a systémy pracovného času? *(Môžete označiť viac odpovedí.)*

TELEPRÁCA: práca mimo pracoviska s pomocou využitia IKT (PC, telefón, fax, modem, Internet, telekonferencie, e-mail atď.).
VYSUNUTÉ MOBILNÉ PRACOVISKÁ: práca na miestach iných ako doma alebo v podnikoch, firemných priestoroch, napr.: u klienta, na ceste.

32.1 Telepráca z domu raz týždenne ☐

32.2 Telepráca z domu viac krát za týždeň ☐

32.3 Vysunuté mobilné pracovisko ☐

32.4 Práca na čiastočný pracovný úväzok ☐

32.5 Pružný pracovný čas ☐

33. Plánuje váš podnik tieto formy organizácie práce v blízkej budúcnosti? *(Môžete označiť viac odpovedí.)*

33.1 Telepráca z domu raz týždenne ☐

33.2 Telepráca z domu viac krát za týždeň ☐

33.3 Vysunuté mobilné pracovisko ☐

33.4 Práca na čiastočný pracovný úväzok ☐

33.5 Pružný pracovný čas ☐

4. Ak váš podnik v rokoch 2005 až 2007 nezaviedol nijaké organizačné inovácie, vyznačte ako dôležité boli pre váš podnik nasledovné faktory *(Priraďte každému faktoru hodnotu z päťstupňovej škály: 5=veľmi dôležitý a 1=nepodstatný).*

34.1 Zavedenie organizačných inovácií pred rokom 2005, ktoré nepožadovali ďalšie zmeny	1	2	3	4	5
34.2 Nedostatok fondov na zavedenie inovácií	1	2	3	4	5
34.3 Nedostatok vedomostí a absencia kvalifikovaných pracovníkov	1	2	3	4	5
34.4 Odpor zamestnancov alebo manažmentu k organizačným zmenám	1	2	3	4	5
34.5 V rokoch 2005 až 2007 absencia potreby zavádzať organizačné zmeny	1	2	3	4	5
34.6. Iné dôvody *(uveďte)*: ……	1	2	3	4	5

OTÁZKU 35 TREBA POLOŽIŤ LEN V PRÍPADE, AK ODPOVEĎ NA OTÁZKU 31.2 BOLA ÁNO, T.J. PODNIK UPLATŇUJE TÍMOVÚ PRÁCU.

35. Ak Váš podnik uplatňuje tímovú prácu, opíšte tento proces. Členovia tímu sami rozhodujú o:

	Áno	**Nie**	**Neviem**	**Nijaká odpoveď**
35.1 - rozdelení pracovných úloh	1	2	8	9
35.2 - výbere vedúceho/vedúcej tímu	1	2	8	9

36. Počas adaptovania sa podnikov na požiadavky trhu je z času na čas potrebné iniciovať organizačné zmeny. Čo sú motivátory zmeny vo vašom podniku *(Priraďte každému dôvodu hodnotu na päťstupňovej škále: 5=absolútne typické a 1=úplne netypické).*

36.1	Zlepšenie výkonu každodennej práce	1	2	3	4	5
36.2	Posilnenie kooperácie a koordinácie v rámci organizácie práce	1	2	3	4	5
36.3	Prispôsobenie sa zmenám prostredia	1	2	3	4	5
36.4	Neprestajné obnovovanie produkov/služieb	1	2	3	4	5
36.5	Neprestajné obnovovanie znalostí a know-how	1	2	3	4	5
36.6	Možnosti využívať outsourcing	1	2	3	4	5
36.7	Zlepšenie kvality a zlepšenie zákazníckych služieb	1	2	3	4	5
36.8	Rastúca veľkosť podniku	1	2	3	4	5
36.9	Iné *(uveďte):*..……..	1	2	3	4	5
36.10	Nijaké organizačné zmeny					

37. Vyhodnoťte na päťbodovej stupnici intenzitu konkurenčného boja s inými podnikmi v rámci skupiny (ak je váš podnik členom skupiny) alebo s vašimi konkurentmi na trhu (ak takí sú) *(Prisúďte váhu danej forme konkurencie z päťbodovej škály: 5= konkurencia je veľmi intenzívna a 1=nijaká konkurencia)*

MOŽNOSŤ 37.1 VYŽADUJE ODPOVEĎ IBA V PRÍPADE AK ODPOVEĎ NA OTÁZKU 6 BOLA ÁNO, NAPRÍKLAD PODNIK JE SÚČASŤOU KONCERNU/SKUPINY.

	Vôbec nijaká konkurencia	⟷			Veľmi intenzívna konkurencia
37.1 Konkurencia medzi pobočkami	1	2	3	4	5
37.2 Trhová konkurencia	1	2	3	4	5

38.Aké dôležité sú nasledovné faktory, ktoré ovplyvňujú výkonnosť vášho podniku *(Prisúďte im hodnotu z päťbodovej stupnice: 5=veľmi dôležitý faktor a 1=nepodstatný faktor).*

38.1	Ceny	1	2	3	4	5
38.2	Orientácia na zákazníkov	1	2	3	4	5
38.3	Kvalita	1	2	3	4	5
38.4	Dodržiavanie termínov a flexibilita	1	2	3	4	5
38.5	Neprestajná obmena produktov/služieb	1	2	3	4	5
38.6	Imidž, značka podniku	1	2	3	4	5
38.7	Neprestajný rozvoj produktov/služieb	1	2	3	4	5
38.8	Zručná pracovná sila	1	2	3	4	5
38.9	Skúsenosti	1	2	3	4	5
38.10	Spoľahlivosť	1	2	3	4	5
38.11	Lobovanie			3		
38.12	Iné *(upresnite):*…..……	1	2	3	4	5

39. Je známe, že informačno-komunikačné technológie hrajú v podniku dôležitú úlohu. *(Uveďte rozsah využívania informačno-komunikačných technológií v nasledujúcich oblastiach):*

39.1 spracovanie informácií/komunikácia (napríklad externá/interná komunikácia) **….%**

39.2 vyššia flexibilita v produkcii a využívaní znalostí

….%

39.3 neprestajný rozvoj produktov/služieb

…..%

IV. ORGANIZÁCIA PRÁCE A VYUŽITIE ZNALOSTÍ

40. Ktoré charakteristiky ľudských zdrojov sú dôležité pre zlepšenie výkonnosti podniku *(Priraďte hodnotu nasledovným charakteristikám z päťbodovej stupnice: 5=veľmi dôležité a 1=nepodstatné)*

40.1 Profesijno-odborné znalosti	1	2	3	4	5
40.2 Skúsenosti a kompetentnosti	1	2	3	4	5
40.3 Manažérske organizačné zručnosti	1	2	3	4	5
40.4 Orientácia na zákazníka	1	2	3	4	5
40.5 Tvorivosť, inovatívne zručnosti	1	2	3	4	5
40.6 Schopnosť spolupracovať	1	2	3	4	5
40.7 Jazykové zručnosti	1	2	3	4	5
40.8 Schopnosť riešiť problémy	1	2	3	4	5
40.9 Všeobecné zručnosti v oblasti informačných technológií	1	2	3	4	5
40.10 Komunikačné zručnosti	1	2	3	4	5
40.11 Dôslednosť a spoľahlivosť v práci	1	2	3	4	5
40.12 Iné *(uveďte):*……	1	2	3	4	5

41. Uveďte podiel zamestnancov s vysokoškolským vzdelaním

Podiel zamestnancov s vysokoškolským vzdelaním: 75 **%**

42. Akú pozornosť venuje vedenie vášho podniku sústavnému rozvoju zručností zamestnancov? *(Priraďte hodnotu nasledovným zručnostiam z päťbodovej stupnice: 5=veľmi dôležité a 1= nepodstatné)*

42.1	Školenia na pracovisku v rámci pracovnej doby	1	2	3	4	5
42.2	Konzultácie s manažérmi/s inými zamestnancami	1	2	3	4	5
42.3	Rotácia na pracovisku	1	2	3	4	5
42.4	Tímová práca	1	2	3	4	5
42.5	Podporovanie kooperácie medzi rôznymi organizačnými jednotkami	1	2	3	4	5
42.6	Účasť na formálnych školeniach	1	2	3	4	5
42.7	Školenia ‘šité na mieru’ podľa potrieb podniku *(napríklad jazykové kurzy, ďalšie odborné školenia, atď.)*	1	2	3	4	5
42.8	Návšteva výstav a veľtrhov	1	2	3	4	5

43. Uveďte podiel zamestnancov, ktorí sa zúčastňujú na rôznych školeniach organizovaných a financovaných podnikom.

		%
43.1	Školenie organizované a financované podnikom *(napríklad jazykový kurz, ďalšie odborné školenie)*	
43.2	Školenie iniciované zamestancom, ale financované zamestnávateľom *(napríklad externé školenie, účasť na konferenciách)*	
43.3	Školenie nefinancované zamestnávateľom ale podporované skráteným pracovným časom *(napríklad ďalšie vzdelávanie/štúdium na vysokej škole atď.)*	

44. Aké druhy školení sú organizované a financované zamestnávateľom? *(Označte iba jednu odpoveď).*

44.1 VÝHRADNE zamerané na zručnosti súvisiace s prácou (napríklad rozvoj odborných zručností)

44.2 VÝHRADNE zamerané na všeobecné zručnosti (napríklad jazykové, komunikačné zručnosti)

44.3 X Zamerané na OBA druhy zručností, t.j. všeobecné aj tie súvisiace s prácou

45. Organizačné zručností sa môžu rozvíjať aj na základe využitia skúseností externých partnerov. V akom rozsahu váš podnik pri rozvoji organizačných zručností využíva nasledujúce skupiny *(Označte príslušný partner X).*

		Pravidelne	**Príležitostne**	**Nikdy**
45.1	Zákazníci			
45.2	Rôzni dodávatelia (napríklad dielov, služieb)			
45.3	Poradenské firmy			
45.4	Vzdelávacie inštitúcie terciálnej sféry			
45.5	Iné vzdelávacie agentúry			
45.6	Výskumné ústavy			
45.7	Rozvojové agentúry			
45.8	Iné odborné organizácie a agentúry pracovného trhu			

46. Meno respondenta…

47. Telefónne číslo respondenta (s predvoľbou)

48. Kód anketára:

49. Dátum interview:

Všeobecné pripomienky anketára:

Appendix 11. Survey questionnaire in Hungarian

Institute for World Economics Hungarian Academy of Sciences	Institute of Economic Research Hitotsubashi University	Institute of Sociology Hungarian Academy of Sciences

MULTINACIONÁLIS VÁLLALATOK ÉS HELYI ERŐFORRÁSOK

Kérdőív

Üzleti szolgáltatási szektor

A VÁLASZADÁS ÖNKÉNTES!

AZ ADATOKAT TITKOSAN KEZELJÜK!

2008.

‘Multinacionális vállalatok és helyi erőforrások’ c. kutatás

sorszám: ☐☐

I. A CÉG ÁLTALÁNOS JELLEMZŐI

1. A cég (vállalat, fióktelep, szervezeti egység) teljes

neve:_____

A következőkben a vizsgált cég alapadatait, szervezeti felépítését és tevékenységi körét rögzítjük.

2. A cég magyarországi központjának címe

_____

Irányítószám Helység Utca Hsz. (hrsz.)

3. A cég statisztikai főtevékenységének száma (TEÁOR, 4 számjegyig): ……

4. A cég megalakulásának éve: ☐☐
(ha a cég 2000-ben jött létre, akkor 00)

5. A cég tulajdonosainak összetétele

100% külföldi ☐
Többségben külföldi ☐
100% magyar magán ☐
Többségi magyar magán ☐
100% magyar állami ☐
Többségi magyar állami ☐
Egyéb, éspedig……

6. Tagja-e a cég valamely vállalatcsoportnak?
(Vállalatcsoport két vagy több, közös tulajdonban lévő, jogi személyiséggel rendelkező vállalkozást jelent. A vállalati központ szintén része a vállalatcsoportnak.)

Igen ☐ Nem ☐ →→→**HA 'NEM', UGORJ A 10. KÉRDÉSRE!**

A következőkben arra kérjük, hogy az anyavállalat legfontosabb jellemzőit foglalja össze.

7. Az anyavállalat melyik országban található?

……

8. Az anyavállalat alkalmazottainak száma:

10 fő alatt ☐
10-49 fő ☐
50-249 fő ☐
250-999 fő ☐
1000 4999 fő ☐
5000-9999 fő ☐
10000 fő vagy annál több ☐

9. Magyarországon volt-e jogelődje a cégnek? (Ha több is volt, akkor a legrégebbit vegyék figyelembe!)

10.1 Nem ☐
10.2 Igen, 1990 előtt alapított állami (szövetkezeti stb.) Tulajdonú cég ☐
10.3 Igen, 1990-ben vagy később alapított állami (szövetkezeti stb.) Tulajdonú cég ☐
10.4 Igen, 1990 előtt alapított magántulajdonú cég ☐
10.5 Igen, 1990-ben vagy később alapított magántulajdonú cég ☐
10.6 Egyéb, éspedig…….

10. A cég alkalmazottainak száma
(Vegye figyelembe a cég állományába tartozó, de a vevő telephelyén dolgozó munkatársakat és az állandó alvállalkozókat is.)

10 fő alatt ☐
10-49 fő ☐
50-249 fő ☐
250-999 fő ☐
1000 4999 fő ☐
5000-9999 fő ☐
10000 fő vagy annál több ☐

11. Hány vezetői szint van az első számú vezető és a végrehajtásban dolgozók között?

☐☐ (A felsővezetőt és a végrehajtás szintjét ne számolja hozzá.)

12. Az Ön cége milyen (rész)tevékenységeket lát el az alábbi szolgáltatási területeken <u>ügyfelei</u> <u>számára</u>?

12.1. Könyvelés, pénzügy, jogi szolgáltatások

Jogi tanácsadás, jogi képviselet ☐
Adótanácsadás ☐
Könyvvizsgálat ☐
Könyvelés ☐
Pénzügyi tanácsadás ☐
Egyéb, éspedig……

12.2. Emberi erőforrás-menedzsment

Munkaerő-közvetítés, -kölcsönzés ☐
Emberi-erőforrás tanácsadás ☐
Képzés ☐
Bérszámfejtés ☐
Egyéb, éspedig……

12.3. Műszaki tervezés, tanácsadás

Építészmérnöki tevékenység ☐
Mérnöki tevékenység, tanácsadás ☐
Műszaki vizsgálat, elemzés ☐
Kutatás-fejlesztés ☐
Egyéb, éspedig……

12.4 Informatikai, számítástechnikai tevékenység

IT rendszerek (hardver, alkalmazás) értékesítés, telepítése és tanácsadás ☐
IT rendszerek (hardver, alkalmazás) üzemeltetése ☐
Szoftverfejlesztés ☐
Adatrögzítés- és feldolgozás ☐
Web-hosting és/vagy web-fejlesztés ☐
Webes tartalomszolgáltatás ☐
Egyéb, éspedig……

12.5. Reklám, marketing, ügyfélszolgálat

Reklám, marketing szolgáltatások ☐
Piackutatás ☐
Gazdasági, üzletviteli tanácsadás ☐
Ügyélszolgálat, call-center működtetése ☐
Egyéb, éspedig……

12.6 Egyéb tevékenység, éspedig

Tevékenységek:……

A következő kérdések a cég piacaira vonatkoznak.

13. 2005 és 2007 között mely földrajzi piacokon értékesítette a cég a szolgáltatásait?

	Igen, jellemzően	**Igen, kisebb jelentőséggel**	**Nem**
13.1 Magyarország határain belül	☐	☐	☐
13.2 A poszt-szocialista régió új EU-tagállamai *(Ez a kategória a következő országokat foglalja magába: Bulgária, Cseh Köztársaság, Észtország, Horvátország, Lengyelország, Lettország, Litvánia, Románia, Szlovákia, Szlovénia)*	☐	☐	☐
13.3 Az EU régi tagállamai *(Ez a következő országokat jelenti: Ausztria, Belgium, Dánia, Egyesült Királyság, Finnország, Franciaország, Görögország, Hollandia, Írország, Luxemburg, Németország, Olaszország, Portugália, Spanyolország, , Svédország)*	☐	☐	☐
13.4 Oroszország, Ukrajna, Kazahsztán	☐	☐	☐
13.5 Ázsia	☐	☐	☐
13.6 Észak-Amerika	☐	☐	☐
13.7 Egyéb, éspedig: ……	☐	☐	

A 14. KÉRDÉST CSAK AKKOR KÉRDEZD, HA A 6. KÉRDÉSRE <u>IGEN</u> VOLT A VÁLASZ, AZAZ A VÁLLALAT TAGJA VALAMELY VÁLLALATCSOPORTNAK.

14. A cég jellemző ügyfelei *(százalékos megoszlásban):*

(Kérjük, az árbevétel alapján értékeljen!)

14.1 A vállalatcsoporton belül vannak **. . . . . százalék**

14.2 A vállalatcsoporton kívül vannak **. . . . . százalék**

15. A cég ügyfeleinek száma:

15.1 Egy ügyfél ☐

15.2 Több ügyfél ☐

A következő kérdések a cég által nyújtott szolgáltatásokra vonatkoznak.

16. A cég által nyújtott szolgáltatások skálája:

16.1 Egy üzleti területen egy-két szolgáltatás ☐

16.2 Egy üzleti területen több szolgáltatás ☐

16.3 Több üzleti területen –egy-két szolgáltatás ☐

16.4 Több üzleti területen több szolgáltatás ☐

17. A cég által nyújtott <u>jellemző</u> szolgáltatások jellege *(százalékos megoszlásban)*:
(Kérjük, az árbevétel alapján értékeljen!)

17.1 A vevő egyedi igényeinek megfelelő megoldás (pl. IT: egyedi szoftver fejlesztése vagy HR: karriertanácsadás)

. . . . . százalék

17.2 Sztenderdizált szolgáltatás (pl. IT: csomagolt szoftver vagy HR: bérszámfejtés)

. . . . . százalék

18. A cég által nyújtott szolgáltatások között milyen arányt képviselnek az alacsony és a magas hozzáadott értékű szolgáltatások?

18.1 Alacsony hozzáadott érték (pl. adatfeldolgozás) **…… százalék**

18.2 Magas hozzáadott érték (pl. szoftverfejlesztés) **…… százalék**

II. A MAGYAR ÉS KÜLFÖLDI MENEDZSMENT KAPCSOLATA

19. Vannak-e az Ön cégénél külföldi menedzserek vagy vezetők?

Igen ☐ Nem ☐ →→→**HA 'NEM', UGORJ A 25. KÉRDÉSRE!**

20. Az Ön cége az elmúlt években milyen mértékben támaszkodott külföldi vezetőkre és szakértőkre a menedzsmentben? Ha nem rendelkezik pontos adatokkal, kérjük, becsülje meg a számukat!

Év	Külföldi menedzserek száma	Hazai menedzserek száma	Összesen
2007			
2003			

21. Honnan érkeztek a külföldi menedzserek?

Év	Az anyavállalat központjából	A vállalatcsoport más tagjától	Más vállalattól ('kívülről')	Összesen
2007				100%
2003				100%

22. Kérjük, becsülje meg, hogy ugyanebben az időszakban hány magyar munkavállaló dolgozott a vállalatcsoport külföldi cégeinél!

Év	Külföldön dolgozó magyar menedzserek száma
2007	
2003	

23. A cég vezetőjének nemzetisége:

23.1 Magyar ☐ 23.2 Külföldi ☐

A következőkben a cég külföldi anyavállalattal való kapcsolatáról kérdezzük.

24. Az Ön cégénél az alábbi területekért magyar vagy külföldi felsővezető felel? (Jelölje X-szel)

	Külföldi	**Magyar**
24.1 Könyvelés és pénzügy		
24.2 Emberi erőforrás-menedzsment		
24.3 Termelésirányítás		
24.4 Minőség-ellenőrzés		
24.5 Értékesítés és marketing		
24.6 Ügyfélszolgálat		
24.7 Informatika		
24.8 Kutatás-fejlesztés		

A 25. ÉS 26. KÉRDÉST CSAK AKKOR TEDD FEL, HA A 6. KÉRDÉSRE IGEN VOLT A VÁLASZ!

25. Milyen mértékben vesz részt a helyi vezetés a vállalati folyamatok kialakításában?

25.1 Az anyavállalat által kialakított standard folyamatokat veszi át ☐

25.2 Az anyavállalat által kialakított folyamatokat veszi át, de aktívan részt is vesz ezen standardok fejlesztésében ☐

25.3 Az anyavállalat által kialakított standardokat a helyi viszonyokra adaptálja ☐

25.4 Önállóan, de a vállalatcsoport általános irányvonalainak megfelelően alakítja ki a folyamatait ☐

25.5 Önállóan, a anyavállalat gyakorlatától függetlenül alakítja ki a folyamatait ☐

25.5 A vevő eljárásait és gyakorlatait viszi, fejleszti tovább (pl. üzleti folyamat kiszervezés) ☐

Az előző kérdésben felmerült folyamatok közül most egy kiemelt területtel, az emberi-erőforrás menedzsmenttel (HR) kapcsolatban kérdezünk.

26. Kérjük, értékelje az anyavállalat és az Önök vállalata (leányvállalat) emberi-erőforrás gazdálkodási gyakorlata közötti kapcsolatokat. Az Önök (leány)vállalata:
(Kérjük, csak egy választ jelöljön meg!)

26.1 A központi vállalat HR rendszerét alkalmazza ☐

26.2 A központi vállalat HR-rendszerét a helyi viszonyoknak megfelelő minimális változtatásokkal alkalmazza ☐

26.3 A helyi szokásoknak megfelelő, de a központi vállalati gyakorlattal konzisztens HR-rendszert alakít ki ☐

26.4 A központi vállalati gyakorlattól függetlenül, a helyi szokásoknak megfelelően alakítja a HR rendszerét ☐

27. Az Ön cégénél működik-e igazgatóság/igazgatótanács vagy felügyelő bizottság? ***(Ha a cég Magyarországon bejegyzett vállalat szervezeti egysége, akkor a bejegyzett vállalatról válaszoljon!)***

27.1 Csak igazgatóság/igazgatótanács működik

→→→ **UGORJ A 29. KÉRDÉSRE!**

27.2 Igazgatóság és felügyelő bizottság is működik

27.3 Egyik sincs →→→ **UGORJ A 30. KÉRDÉSRE!**

28. Kérjük, becsülje meg a felügyelő bizottság összetételét nemzetiség szerint!

	Külföldi	**Magyar**
28.1 Felügyelő bizottság elnöke		
28.2 Felügyelőbizottsági tagok száma		
28.3 - ebből külső tagok száma		
28.4 - ebből független tagok száma		

29. Kérjük, becsülje meg az igazgatóság összetételét nemzetiség szerint!

	Külföldi	**Magyar**
29.1 Igazgatóság elnöke		
29.2 Igazgatósági tagok száma		
29.3 - ebből külső tagok száma		
29.4 - ebből független tagok száma		

III. A SZERVEZETI INNOVÁCIÓK ELTERJEDTSÉGE A CÉGEN BELÜL

30. A 2005-től 2007-ig tartó időszakban az Önök vállalkozása vezetett-e be:

30.1 A munkavégzést vagy szervezeti folyamatokat érintő új **üzleti gyakorlatokat** (*pl. ellátási-lánc-menedzsment, üzleti folyamatok átszervezése, lapos szervezet, minőségmenedzsment, oktatási/képzési rendszerek, stb.*) ☐

30.2 Új **tudásmenedzsment rendszereket** annak érdekében, hogy hatékonyabb legyen a vállalaton belüli és kívüli információk és tudások felhasználása és megosztása ☐

30.3 A **munkaszervezés** új módszereit (*pl. az alkalmazottak felelősségének növelése a munkavégzésben, csapatmunka, decentralizáció, szervezeti egységek összevonása vagy részekre bontása, stb.*) ☐

30.4 Más vállalatokkal vagy közintézményekkel való **külső kapcsolatok** szervezésének új módszereit (*pl. szövetségek, partnerségek, kiszervezés, stb.*) ☐

31. Az alábbi munkaszervezési módszerek közül melyeket alkalmazzák vállalatánál?

31.1 Munkaköri csere (rotáció) ☐

31.2 Team-munka ☐

31.3 A dolgozók javaslatainak összegyűjtése ☐

31.4 A minőségellenőrzést a munkavállalók végzik (minőségi körök vagy csoportok) ☐

31.5 Különböző szakmákat átfogó munkacsoportok létrehozása ☐

31.6 Projekt-alapú munkavégzés ☐

31.7 A versenytársak tevékenységének figyelemmel kísérése (benchmarking) ☐

31.8 Lapos szervezeti felépítés ☐

31.9 Minőségirányítási rendszer (pl. ISO, TQM) alkalmazása ☐

32. Amennyiben az Önök vállalkozása nem vezetett be szervezeti innovációt 2005 és 2007 között, az alábbi tényezők milyen szerepet játszottak ebben? *(Kérjük, egy ötös skálán értékeljen úgy, hogy ötöst ad, ha egy tényezőt nagyon fontosnak, és egyest, ha egyáltalán nem fontosnak tart!)*

32.1 2005 előtt vezettek be szervezeti innovációt és azóta nem volt szükség további változtatásra	1	2	3	4	5
32.2 A szervezeti innováció bevezetéséhez szükséges források hiánya	1	2	3	4	5
32.3 A szervezeti innováció bevezetéséhez szükséges hozzáértő és megfelelően képzett munkaerő hiánya	1	2	3	4	5
32.4 Az alkalmazottak vagy a vezetés ellenállása a szervezeti változásokkal szemben	1	2	3	4	5
32.5 2005 és 2007 között nem volt szükség szervezeti innováció bevezetésére	1	2	3	4	5
32.6. Egyéb ok, éspedig: ……	1	2	3	4	5

A 33. KÉRDÉST AKKOR KÉRDEZD, HA A 31.2 KÉRDÉSRE IGEN VOLT A VÁLASZ!

33. Ha az Ön cégénél előfordul a team-munka, kérjük, jellemezze azok működését! A team tagjai maguk döntenek ...

Olvasd fel!	**Igen**	**Nem**	**Nem tudja**	**Nem válaszol**
33.1 - ...a feladatok megosztásáról	1	2	8	9
33.2 - ...arról, ki legyen a csoport vezetője	1	2	8	9

34. A cégek hatékony piaci alkalmazkodása szempontjából időnként elengedhetetlenek a szervezeti változások. Az Ön cégénél mik a szervezeti változtatások indítékai? ***(Kérjük, egy ötös skálán értékelje a felsorolt indokokat úgy, hogy ötöst ad, ha nagymértékben jellemző és egyest, ha egyáltalán nem jellemző!)***

34.1	A napi munka hatékonyságának javítása	1	2	3	4	5
34.2	A szervezeten belüli együttműködés és koordináció erősítése	1	2	3	4	5
34.3	Alkalmazkodás a környezeti változásokhoz	1	2	3	4	5
34.4	A termékek és szolgáltatások folyamatos megújítása	1	2	3	4	5
34.5	A tudások és ismeretek folyamatos megújítása	1	2	3	4	5
34.6	Tevékenységek kiszervezése	1	2	3	4	5
34.7	A minőség és a vevőszolgálat javítása	1	2	3	4	5
34.8	A cég méretének növekedése	1	2	3	4	5
34.9	Egyéb,éspedig:…… ……	1	2	3	4	5
34.10	Nincsenek/nem voltak szervezeti változások a cégnél					

35. Értékelje egytől ötig terjedő skálán, hogy milyen intenzitású verseny folyik a munkák, tevékenységek elnyeréséért a vállalatcsoport leányvállalatai (ha értelmezhető), illetve a piaci versenytársak (ha vannak) között! *(Kérjük, egy ötös skálán értékeljen úgy, hogy ötös ad, ha nagyon intenzív a verseny, és egyest, ha egyáltalán nincs verseny! Karikázza a nullát, ha nincs jelen azon a piacon.)*

A 35.1 KÉRDÉST CSAK AKKOR KÉRDEZD, HA A 6. KÉRDÉSRE <u>IGEN</u> VOLT A VÁLASZ, AZAZ A VÁLLALAT TAGJA VALAMELY VÁLLALATCSOPORTNAK!

		Egyáltalán nincs verseny	⟷			Nagyon intenzív verseny
35.1	Vállalatcsoporton belüli verseny	1	2	3	4	5
35.2	‘Külső’ piaci verseny	1	2	3	4	5

36. Versenytársaival összehasonlítva a következő tényezők milyen szerepet játszanak a cég teljesítményében? *(Kérjük, egy ötös skálán értékeljen úgy, hogy ötöst ad, ha az adott tényezőt a cég teljesítményében kiemelkedőnek tartja, és egyest, ha nem játszik szerepet!)*

36.1	Árak	1	2	3	4	5
36.2	Vevő-centrikus szemlélet	1	2	3	4	5
36.3	Minőség	1	2	3	4	5
36.4	Gyorsaság és rugalmasság	1	2	3	4	5
36.5	Termékek/szolgáltatások sokoldalúsága	1	2	3	4	5
36.6	Imázs, márka, arculat	1	2	3	4	5
36.7	Termékek/szolgáltatások folyamatos fejlesztése	1	2	3	4	5
36.8	Szakképzett munkaerő	1	2	3	4	5
36.9	Tapasztalat	1	2	3	4	5
36.10	Megbízhatóság	1	2	3	4	5
36.11	Lobbitevékenység					
36.12	Egyéb, éspedig: …… ……	1	2	3	4	5

37. Közismert az IKT használatának kiemelkedő jelentősége a vállalkozások működésében. Kérjük becsülje meg, hogy az alábbiak területeken milyen arányban használnak IKT eszközöket (infokommunikációs technológiákat?

37.1 Információfeldolgozás/kommunikáció *(pl. külső-belső levelezés)*

. . . . . százalék

37.2 Vállalati folyamatok alakítása *(pl. integrált vállalatirányítási rendszer)*

. . . . . százalék

37.3 Fejlesztési tevékenység *(pl. saját tudásbázis létrehozása, ügyfélforgalom mérése, saját alkalmazások készítése)*

. . . . . százalék

IV. A MUNKASZERVEZET ÉS A TUDÁSFELHASZNÁLÁS JELLEMZŐI

38. A vállalat egészének működését figyelembe véve, az emberi erőforrások alábbiakban felsorolt jellemzői közül melyeket tartja fontosnak a vállalat szempontjából? *(Kérjük, egy ötös skálán értékeljen úgy, hogy ötöst ad, ha nagyon fontosak, és egyest, ha egyáltalán nem fontosak!)*

38.1 Szakmai-technikai tudás	1	2	3	4	5
38.2 Begyakorlottság, jártasság	1	2	3	4	5
38.3 Vezetési-szervezési készség	1	2	3	4	5
38.4 Ügyfél- és vevőcentrikus szemlélet	1	2	3	4	5
38.5 Kreativitás, innovációs készség	1	2	3	4	5
38.6 Együttműködési, alkalmazkodási készség	1	2	3	4	5
38.7 Nyelvtudás	1	2	3	4	5
38.8 Problémamegoldó képesség	1	2	3	4	5
38.9 Általános informatikai ismeretek	1	2	3	4	5
38.10 Kommunikációs készség	1	2	3	4	5
38.11 Precíz, megbízható munkavégzés	1	2	3	4	5
38.12 Egyéb, éspedig: ……	1	2	3	4	5

39. Kérjük, becsülje meg, a cég munkavállalóinak hány százaléka rendelkezik főiskolai vagy egyetemi diplomával!

A diplomával rendelkező munkavállalók aránya: …… **százalék**

40. Mekkora jelentőséget tulajdonít a vezetés az alábbi módszereknek a munkavállalói tudás folyamatos fejlesztésében? *(Kérjük, egy ötös skálán értékeljen úgy, hogy ötöst ad, ha kiemelkedő jelentőségű, és egyest, ha nincs jelentősége!)*

40.1	Munkahelyi képzés / 'On-the-job training'	1	2	3	4	5
40.2	A vezetéssel vagy más alkalmazottal való konzultáció lehetősége	1	2	3	4	5
40.3	Munkaköri csere	1	2	3	4	5
40.4	Csoportos munkavégzés alkalmazása	1	2	3	4	5
40.5	Szervezeti egységek közötti együttműködés ösztönzése	1	2	3	4	5
40.6	Iskolarendszerű képzésben való részvétel	1	2	3	4	5
40.7	A cég igényeihez igazodó képzés megszervezése *(pl. nyelvtanfolyam, vállalati szakmai továbbképzés, stb.)*	1	2	3	4	5
40.8	Vásárok, kiállítások, szakmai találkozók látogatása	1	2	3	4	5

41. Kérjük, becsülje meg, hogy a cég munkavállalóinak mekkora aránya vett részt különböző módon szervezett és finanszírozott képzésekben?

		Százalék
41.1	A cég által szervezett és finanszírozott képzés *(pl. munkahelyi nyelvtanfolyam, munkahelyi szakmai továbbképzés)*	……
41.2	A munkavállaló által választott, de a cég által finanszírozott képzés *(pl. tréning, konferencia)*	……
41.3	Nem finanszírozott, de munkaidő-kedvezménnyel támogatott képzés *(pl. másoddiplomás képzés)*	……

42. Jellemzően milyen területhez kapcsolódik a munkaadó által finanszírozott képzés? (Kérjük, egy választ jelöljön meg!)

42.1 KIZÁRÓLAG specifikusan a munkafeladathoz (pl. minőség, szaktudás)

42.2 KIZÁRÓLAG általános készségekhez (pl. nyelv, tárgyalástechnika)

42.3 A munkafeladatokhoz ÉS általános készségekhez

43. A szervezeti tudás fejleszthető számos külső partner tapasztalatának, tudásának, visszajelzésének becsatornázásával. Milyen mértékben támaszkodnak a következő csoportokra a szervezeti tudás és a szolgáltatások fejlesztésében? (Jelölje X-szel!)

		Rend-szeresen	**Eseten-ként**	**Soha**
43.1	Ügyfelek, megrendelők			
43.2	Külső beszállítók, szolgáltatók, nyersanyagot, eszközöket, rendszereket (be)szállító cégek			
43.3	Külső tanácsadók			
43.4	Felsőoktatási intézmények			
43.5	Egyéb oktatási intézmények			
43.6	Kutatóintézetek			
43.7	Fejlesztési ügynökségek és szervezetek			
43.8	Foglalkoztatáspolitikai és szakmai szervezetek vagy egyesületek			

44. A kérdezőbiztos kódja:……

45. Az interjúalany

neve:…….

46. Az interjúalany telefonszáma

(körzetszámmal):…….

47. Az interjúkészítés időpontja: 2008. ……..hó……nap

A kérdezőbiztos általános megjegyzései:

Kérdezőbiztos aláírása…….……..…….

Appendix 12. Cross tables

Note: HM, HS and SS denote Hungarian manufacturing firms, Hungarian service firms and Slovakian service firms, respectively.

Section I. Firm and Its Context

1. Year of establishment (Common: Q4)

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
1930-34	3	0.8	2	1.0	1	0.5	0	0.0
1935-39	0	0.0	0	0.0	0	0.0	0	0.0
1940-44	0	0.0	0	0.0	0	0.0	0	0.0
1945-49	1	0.3	1	0.5	0	0.0	0	0.0
1950-54	0	0.0	0	0.0	0	0.0	3	3.1
1955-59	2	0.5	0	0.0	2	1.0	1	1.0
1960-64	1	0.3	0	0.0	1	0.5	0	0.0
1965-69	3	0.8	1	0.5	2	1.0	1	1.0
1970-74	3	0.8	1	0.5	2	1.0	0	0.0
1975-79	1	0.3	1	0.5	0	0.0	0	0.0
1980-84	3	0.8	1	0.5	2	1.0	0	0.0
1985-89	16	4.1	12	6.3	4	2.0	0	0.0
1990-94	134	34.6	86	45.0	48	24.5	25	25.8
1995-99	100	25.8	52	27.2	48	24.5	21	21.6
2000-04	91	23.5	25	13.1	66	33.7	30	30.9
2005-	29	7.5	9	4.7	20	10.2	16	16.5
Hard to answer/no answer	0	0.0	0	0.0	0	0.0	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

2. Corporate ownership structure of the firm (Common: Q5)

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
100% foreign-owned enterprise	60	15.5	42	22.0	18	9.2	26	26.8
Majority foreign-owned enterprise	29	7.5	14	7.3	15	7.7	12	12.4
100% domestically-owned enterprise	243	62.8	117	61.3	126	64.3	41	42.3
Majority domestically-owned enterprise	17	4.4	7	3.7	10	5.1	8	8.2
100% domestically state-owned enterprise	23	5.9	7	3.7	16	8.2	4	4.1
Majority domestically state-owned enterprise	4	1.0	2	1.0	2	1.0	3	3.1
Other	11	2.8	2	1.0	9	4.6	3	3.1
Hard to answer/no answer	0	0.0	0	0.0	0	0.0	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

3. Affilication to a company group (Common: Q6)

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
Yes	74	19.1	39	20.4	35	17.9	49	50.5
No	313	80.9	152	79.6	161	82.1	48	49.5
Hard to answer/no answer	0	0.0	0	0.0	0	0.0	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

4. Location of the parent company of group firms (Common: Q7)

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
Austria	8	2.1	5	2.6	3	1.5	0	0.0
Croatia	0	0.0	0	0.0	0	0.0	1	1.0
Cypress	1	0.3	0	0.0	1	0.5	0	0.0
Czech	0	0.0	0	0.0	0	0.0	6	6.2
England	4	1.0	1	0.5	3	1.5	5	5.2
Finnland	1	0.3	0	0.0	1	0.5	0	0.0
France	3	0.8	1	0.5	2	1.0	3	3.1
Germany	15	3.9	13	6.8	2	1.0	4	4.1
Holland	1	0.3	0	0.0	1	0.5	1	1.0
Hungary	23	5.9	6	3.1	17	8.7	0	0.0
Italy	3	0.8	3	1.6	0	0.0	0	0.0
Ireland	0	0.0	0	0.0	0	0.0	1	1.0
Japan	2	0.5	2	1.0	0	0.0	0	0.0
Slovakia	1	0.3	1	0.5	0	0.0	13	13.4
Slovenia	1	0.3	0	0.0	1	0.5	2	2.1
Spain	1	0.3	1	0.5	0	0.0	0	0.0
Sweden	2	0.5	1	0.5	1	0.5	0	0.0
Switzerland	1	0.3	1	0.5	0	0.0	0	0.0
UAE	0	0.0	0	0.0	0	0.0	1	1.0
United States	6	1.6	4	2.1	2	1.0	14	14.4
Hard to answer/no answer	314	81.1	152	79.6	162	82.7	46	47.4
Total	387	100.0	191	100.0	196	100.0	97	100.0

5. Number of employees at the parent company (Common: Q8)

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
Less 10 persons	3	0.8	0	0.0	3	1.5	48	49.5
10-49 persons	18	4.7	2	1.0	16	8.2	15	15.5
50-249 persons	15	3.9	8	4.2	7	3.6	12	12.4
250-999 persons	9	2.3	6	3.1	3	1.5	6	6.2
1000-4999 persons	8	2.1	6	3.1	2	1.0	16	16.5
5000-9999 persons	3	0.8	3	1.6	0	0.0	0	0.0
10000 or more	13	3.4	9	4.7	4	2.0	0	0.0
Hard to answer/no answer	318	82.2	157	82.2	161	82.1	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

6. Did the firm have a legal predecessor before 1990? (Common: Q9)

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
No	315	81.4	160	83.8	155	79.1	35	36.1
State-owned firm, founded before 1990	20	5.2	15	7.9	5	2.6	5	5.2
State-owned firm, founded in or after 1990	3	0.8	3	1.6	0	0.0	1	1.0
Private firm, founded before 1990	5	1.3	3	1.6	2	1.0	4	4.1
Private firm, founded in or after 1990	9	2.3	3	1.6	6	3.1	3	3.1
Other	4	1.0	0	0.0	4	2.0	0	0.0
Hard to answer/no answer	31	8.0	7	3.7	24	12.2	49	50.5
Total	356	92.0	191	100.0	196	100.0	97	100.0

7. Number of employees (Common: Q10)

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
Less 10 persons	0	0.0	0	0.0	0	0.0	9	9.3
10-49 persons	259	66.9	101	52.9	158	80.6	55	56.7
50-249 persons	100	25.8	69	36.1	31	15.8	26	26.8
250-999 persons	24	6.2	17	8.9	7	3.6	7	7.2
1000-4999 persons	3	0.8	3	1.6	0	0.0	0	0.0
5000-9999 persons	1	0.3	1	0.5	0	0.0	0	0.0
10000 or more	0	0.0	0	0.0	0	0.0	0	0.0
Hard to answer/no answer	0	0.0	0	0.0	0	0.0	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

8. How many organizational levels does the firm have between the CEO and the employees? (Common: Q11)

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
0	52	13.4	23	12.0	29	14.8	3	3.1
1	147	38.0	69	36.1	78	39.8	27	27.8
2	105	27.1	56	29.3	49	25.0	28	28.9
3	58	15.0	32	16.8	26	13.3	20	20.6
4	15	3.9	7	3.7	8	4.1	9	9.3
5	5	1.3	3	1.6	2	1.0	2	2.1
6	2	0.5	1	0.5	1	0.5	2	2.1
7	0	0.0	0	0.0	0	0.0	2	2.1
8	0	0.0	0	0.0	0	0.0	2	2.1
9	0	0.0	0	0.0	0	0.0	0	0.0
10 or more	0	0.0	0	0.0	0	0.0	2	2.1
Hard to answer/no answer	3	0.8	0	0.0	3	1.5	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

9. What services does the company provide for its clients in the following fields? (Multiple answer) (HS: Q12, SS: Q12)

(a) Accounting, financial services, and legal services

	Hungary		Slovakia	
	(A) Service firms		(B) Service firms	
	Number	Share (%)	Number	Share (%)
Legal services	4	6.1	12	1.9
Tax consultancy	10	15.2	5	0.8
Financial audit	4	6.1	6	0.9
Accounting	12	18.2	9	1.4
Financial consultancy	19	28.8	9	1.4
Other	17	25.8	0	0.0
Total	66	100.0	41	6.4

(b) Human resources management

	Hungary		Slovakia	
	(A) Service firms		(B) Service firms	
	Number	Share (%)	Number	Share (%)
Employee recruitment, manpower leasing	17	40.5	9	20.0
HR consulting	5	11.9	13	28.9
Training and education	14	33.3	19	42.2
Payroll	4	9.5	4	8.9
Other	2	4.8	0	0.0
Total	42	100.0	45	100.0

(c) Architectural and engineering activities, consulting

	Hungary		Slovakia	
	(A) Service firms		(B) Service firms	
	Number	Share (%)	Number	Share (%)
Architectural activities	9	11.8	11	52.4
Engineering activities and related technical	28	36.8	7	33.3
Technical testing and analysis	25	32.9	3	14.3
Research and development	12	15.8	0	0.0
Other	2	2.6	0	0.0
Total	76	100.0	21	100.0

(d) IT activities

	Hungary		Slovakia	
	(A) Service firms		(B) Service firms	
	Number	Share (%)	Number	Share (%)
Sales, implementation of IT systems and related	19	17.6	17	3.3
Operating IT systems	18	16.7	11	2.1
Software development	22	20.4	8	1.5
Data entry and processing	18	16.7	8	1.5
Web-hosting and/or web-development	10	9.3	7	1.4
Web portals, content provision	10	9.3	0	0.0
Other	11	10.2	0	0.0
Total	108	100.0	51	9.9

(e) Advertising, marketing, customer service

	Hungary		Slovakia	
	(A) Service firms		(B) Service firms	
	Number	Share (%)	Number	Share (%)
Advertising, marketing services	9	32.1	11	45.8
Market research	5	17.9	8	33.3
Management consultancy activities	5	17.9	2	8.3
Costumer service, operating call-centre	8	28.6	3	12.5
Other	1	3.6	0	0.0
Total	28	100.0	24	100.0

10. Market shares of the company from 2005 through 2007 (HM: Q12; HS: Q13; SS: Q13)

(a) In the domestic market

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
Dominantly	282	72.9	106	55.5	176	89.8	49	50.5
To lesser extent	54	14.0	48	25.1	6	3.1	35	36.1
No share	39	10.1	35	18.3	4	2.0	6	6.2
Hard to answer/no answer	12	3.1	2	1.0	10	5.1	7	7.2
Total	387	100.0	191	100.0	196	100.0	97	100.0

(b) In the post-socialist new EU members states

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
Dominantly	39	10.1	27	14.1	12	6.1	14	14.4
To lesser extent	71	18.3	55	28.8	16	8.2	28	28.9
No share	253	65.4	103	53.9	150	76.5	18	18.6
Hard to answer/no answer	24	6.2	6	3.1	18	9.2	37	38.1
Total	387	100.0	191	100.0	196	100.0	97	100.0

(c) In EU15 countries

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
Dominantly	108	27.9	89	46.6	19	9.7	13	13.4
To lesser extent	46	11.9	35	18.3	11	5.6	22	22.7
No share	215	55.6	65	34.0	150	76.5	22	22.7
Hard to answer/no answer	18	4.7	2	1.0	16	8.2	40	41.2
Total	387	100.0	191	100.0	196	100.0	97	100.0

(d) In Russia, Ukraine and Kazakhstan

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
Dominantly	9	2.3	6	3.1	3	1.5	6	6.2
To lesser extent	22	5.7	19	9.9	3	1.5	14	14.4
No share	331	85.5	160	83.8	171	87.2	27	27.8
Hard to answer/no answer	25	6.5	6	3.1	19	9.7	50	51.5
Total	387	100.0	191	100.0	196	100.0	97	100.0

(e) In Asia

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
Dominantly	9	2.3	5	2.6	4	2.0	5	5.2
To lesser extent	19	4.9	14	7.3	5	2.6	11	11.3
No share	334	86.3	165	86.4	169	86.2	27	27.8
Hard to answer/no answer	25	6.5	7	3.7	18	9.2	54	55.7
Total	387	100.0	191	100.0	196	100.0	97	100.0

(f) In North America

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
Dominantly	12	3.1	7	3.7	5	2.6	11	11.3
To lesser extent	15	3.9	12	6.3	3	1.5	7	7.2
No share	332	85.8	164	85.9	168	85.7	25	25.8
Hard to answer/no answer	28	7.2	8	4.2	20	10.2	54	55.7
Total	387	100.0	191	100.0	196	100.0	97	100.0

(g) In other markets

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
Dominantly	7	1.8	6	3.1	1	0.5	4	4.1
To lesser extent	13	3.4	11	5.8	2	1.0	3	3.1
No share	0	0.0	0	0.0	0	0.0	17	17.5
Hard to answer/no answer	367	94.8	174	91.1	193	98.5	73	75.3
Total	387	100.0	191	100.0	196	100.0	97	100.0

11. Share of customers in total turnover (HM: Q13; HS: Q14; SS: Q14)

(a) Share of group companies

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
0%	13	3.4	6	3.1	7	3.6	68	70.1
1–10%	16	4.1	7	3.7	9	4.6	12	12.4
11–20%	7	1.8	2	1.0	5	2.6	3	3.1
21–30%	3	0.8	0	0.0	3	1.5	0	0.0
31–40%	5	1.3	3	1.6	2	1.0	0	0.0
41–50%	2	0.5	1	0.5	1	0.5	0	0.0
51–60%	2	0.5	2	1.0	0	0.0	4	4.1
61–70%	2	0.5	2	1.0	0	0.0	3	3.1
71–80%	2	0.5	2	1.0	0	0.0	3	3.1
81–90%	3	0.8	1	0.5	2	1.0	2	2.1
91–100%	13	3.4	12	6.3	1	0.5	2	2.1
Hard to answer/no answer	319	82.4	153	80.1	166	84.7	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

(b) Share of non-group companies

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
0%	12	3.1	11	5.8	1	0.5	49	50.5
1–10%	5	1.3	3	1.6	2	1.0	3	3.1
11–20%	2	0.5	2	1.0	0	0.0	2	2.1
21–30%	1	0.3	1	0.5	0	0.0	4	4.1
31–40%	2	0.5	2	1.0	0	0.0	4	4.1
41–50%	3	0.8	2	1.0	1	0.5	0	0.0
51–60%	5	1.3	3	1.6	2	1.0	0	0.0
61–70%	3	0.8	0	0.0	3	1.5	0	0.0
71–80%	5	1.3	1	0.5	4	2.0	2	2.1
81–90%	12	3.1	5	2.6	7	3.6	7	7.2
91–100%	24	6.2	8	4.2	16	8.2	26	26.8
Hard to answer/no answer	313	80.9	153	80.1	160	81.6	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

12. Number of customers (HM: Q14; HS: Q15; HS: Q15)

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
One customer	12	3.1	10	5.2	2	1.0	3	3.1
More customers	363	93.8	179	93.7	184	93.9	94	96.9
Hard to answer/no answer	12	3.1	2	1.0	10	5.1	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

13. Scale of services provided by the firm (HS: Q16, SS: Q16)

	Hungary		Slovakia	
	(A) Service firms		(B) Service firms	
	Number	Share (%)	Number	Share (%)
One-two services in one business field	51	26.0	24	24.7
More services in one business field	85	43.4	46	47.4
One-two services in more business fields	16	8.2	2	2.1
More services in more business fields	40	20.4	26	26.8
Hard to answer/no answer	4	2.0	0	0.0
Total	196	100.0	98	101.0

14. Share of different type of services in total turnover (%) (HS: Q17, SS: Q17)

(a) Tailor-made solutions (e.g. IT: software development or HR: carrier planning)

	Hungary		Slovakia	
	(A) Service firms		(B) Service firms	
	Number	Share (%)	Number	Share (%)
0%	19	9.7	5	5.2
1-10%	6	3.1	5	5.2
11-20%	8	4.1	2	2.1
21-30%	6	3.1	2	2.1
31-40%	5	2.6	2	2.1
41-50%	11	5.6	28	28.9
51-60%	14	7.1	2	2.1
61-70%	10	5.1	3	3.1
71-80%	18	9.2	7	7.2
81-90%	20	10.2	11	11.3
91-100%	64	32.7	30	30.9
Hard to answer/no answer	15	7.7	0	0.0
Total	196	100.0	97	100.0

(b) Standardized services (e.g. . IT: packaged software or HR: payroll)

	Hungary		Slovakia	
	(A) Service firms		(B) Service firms	
	Number	Share (%)	Number	Share (%)
0%	54	27.6	22	22.7
1-10%	24	12.2	17	17.5
11-20%	16	8.2	7	7.2
21-30%	12	6.1	4	4.1
31-40%	14	7.1	2	2.1
41-50%	11	5.6	29	29.9
51-60%	5	2.6	2	2.1
61-70%	6	3.1	1	1.0
71-80%	8	4.1	2	2.1
81-90%	4	2.0	5	5.2
91-100%	24	12.2	6	6.2
Hard to answer/no answer	18	9.2	0	0.0
Total	196	100.0	97	100.0

15. Share of the low- and high value-added services in total turnover (%) (HS: Q18, SS: Q18)

(a) Low value-added (e.g. data entry and processing)

	Hungary		Slovakia	
	(A) Service firms		(B) Service firms	
	Number	Share (%)	Number	Share (%)
0%	55	28.1	29	29.9
1-10%	28	14.3	12	12.4
11-20%	18	9.2	10	10.3
21-30%	9	4.6	8	8.2
31-40%	8	4.1	2	2.1
41-50%	9	4.6	22	22.7
51-60%	5	2.6	2	2.1
61-70%	10	5.1	3	3.1
71-80%	3	1.5	2	2.1
81-90%	4	2.0	2	2.1
91-100%	16	8.2	5	5.2
Hard to answer/no answer	31	15.8	0	0.0
Total	196	100.0	97	100.0

(b) High value-added (e.g. software development or consultancy)

	Hungary		Slovakia	
	(A) Service firms		(B) Service firms	
	Number	Share (%)	Number	Share (%)
0%	19	9.7	3	3.1
1-10%	4	2.0	4	4.1
11-20%	3	1.5	2	2.1
21-30%	10	5.1	3	3.1
31-40%	5	2.6	2	2.1
41-50%	9	4.6	22	22.7
51-60%	8	4.1	1	1.0
61-70%	9	4.6	8	8.2
71-80%	17	8.7	8	8.2
81-90%	22	11.2	7	7.2
91-100%	59	30.1	37	38.1
Hard to answer/no answer	31	15.8	0	0.0
Total	196	100.0	97	100.0

16. Rate of change of products (HM: Q15)

	Hungary	
	Manufacturing firms	
	Number	Share (%)
Non-changing	30	30.9
Slowly changing	116	119.6
Fast changing	45	46.4
Hard to answer/no answer	0	0.0
Total	191	196.9

17. Share of different type of products in total turnover (%) (HM: Q16)

(a) Share of individual product

	Hungary	
	Manufacturing firms	
	Number	Share (%)
0%	71	37.2
1-10%	27	14.1
11-20%	8	4.2
21-30%	11	5.8
31-40%	3	1.6
41-50%	13	6.8
51-60%	2	1.0
61-70%	4	2.1
71-80%	5	2.6
81-90%	5	2.6
91-100%	35	18.3
Hard to answer/no answer	7	3.7
Total	191	100.0

(b) Share of mass product

	Hungary	
	Manufacturing firms	
	Number	Share (%)
0%	27	14.1
1-10%	7	3.7
11-20%	6	3.1
21-30%	4	2.1
31-40%	2	1.0
41-50%	13	6.8
51-60%	3	1.6
61-70%	8	4.2
71-80%	9	4.7
81-90%	14	7.3
91-100%	89	46.6
Hard to answer/no answer	9	4.7
Total	191	100.0

18. Level of technology used by the firm compared to the period before 2005 (HM: Q17)

	Hungary	
	Manufacturing firms	
	Number	Share (%)
Same	66	34.6
Improved	108	56.5
Completely new	14	7.3
Hard to answer/no answer	3	1.6
Total	191	100.0

19. Level of technology used by the firm compared to its competitors (HM: Q18)

	Hungary	
	Manufacturing firms	
	Number	Share (%)
Older than the technology used by the competitors	7	3.7
Similar to the technology used by the competitors	117	61.3
More developed than the technology used by the competitors	42	22.0
Internationally 'leading edge' technology	24	12.6
Hard to answer/no answer	1	0.5
Total	191	100.0

Section II. Relations between Foreign and Local Managers

1. Do foreign managers work at your firm? (Common: Q19)

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
Yes	45	11.6	31	16.2	14	7.1	24	24.7
No	342	88.4	160	83.8	182	92.9	73	75.3
Hard to answer/no answer	0	0.0	0	0.0	0	0.0	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

2. Total number of managers (Common: Q20)

(a) In 2003

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
1-10 persons	33	8.5	22	11.5	11	5.6	10	10.3
11-20 persons	3	0.8	3	1.6	0	0.0	2	2.1
21-30 persons	1	0.3	1	0.5	0	0.0	4	4.1
31-40 persons	0	0.0	0	0.0	0	0.0	2	2.1
41-50 persons	0	0.0	0	0.0	0	0.0	0	0.0
51-60 persons	0	0.0	0	0.0	0	0.0	0	0.0
61-70 persons	0	0.0	0	0.0	0	0.0	0	0.0
71-80 persons	1	0.3	1	0.5	0	0.0	0	0.0
81-90 persons	0	0.0	0	0.0	0	0.0	0	0.0
91-100 persons	1	0.3	1	0.5	0	0.0	0	0.0
100 or more	0	0.0	0	0.0	0	0.0	1	1.0
Hard to answer/no answer	348	89.9	163	85.3	185	94.4	78	80.4
Total	387	100.0	191	100.0	196	100.0	97	100.0

(b) In 2007

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
1-10 persons	36	9.3	23	12.0	13	6.6	9	9.3
11-20 persons	3	0.8	3	1.6	0	0.0	4	4.1
21-30 persons	1	0.3	1	0.5	0	0.0	2	2.1
31-40 persons	0	0.0	0	0.0	0	0.0	1	1.0
41-50 persons	0	0.0	0	0.0	0	0.0	2	2.1
51-60 persons	0	0.0	0	0.0	0	0.0	3	3.1
61-70 persons	0	0.0	0	0.0	0	0.0	0	0.0
71-80 persons	0	0.0	0	0.0	0	0.0	0	0.0
81-90 persons	1	0.3	1	0.5	0	0.0	0	0.0
91-100 persons	1	0.3	1	0.5	0	0.0	0	0.0
100 or more	0	0.0	0	0.0	0	0.0	3	3.1
Hard to answer/no answer	345	89.1	162	84.8	183	93.4	73	75.3
Total	387	100.0	191	100.0	196	100.0	97	100.0

3. Percentage of foreigners in entire managers (Common: Q20)

(a) In 2003

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
1-10%	3	0.8	3	1.6	0	0.0	3	3.1
11-20%	1	0.3	1	0.5	0	0.0	2	2.1
21-30%	4	1.0	3	1.6	1	0.5	0	0.0
31-40%	5	1.3	2	1.0	3	1.5	4	4.1
41-50%	10	2.6	6	3.1	4	2.0	1	1.0
51-60%	1	0.3	1	0.5	0	0.0	1	1.0
61-70%	2	0.5	1	0.5	1	0.5	3	3.1
71-80%	0	0.0	0	0.0	0	0.0	2	2.1
81-90%	0	0.0	0	0.0	0	0.0	0	0.0
90-100%	6	1.6	5	2.6	1	0.5	1	1.0
Hard to answer/no answer	355	91.7	169	88.5	186	94.9	5	5.2
Total	387	100.0	191	100.0	196	100.0	22	22.7

(b) In 2007

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
1-10%	5	1.3	5	2.6	0	0.0	5	5.2
11-20%	4	1.0	3	1.6	1	0.5	3	3.1
21-30%	2	0.5	1	0.5	1	0.5	4	4.1
31-40%	9	2.3	5	2.6	4	2.0	5	5.2
41-50%	12	3.1	10	5.2	2	1.0	2	2.1
51-60%	0	0.0	0	0.0	0	0.0	1	1.0
61-70%	4	1.0	1	0.5	3	1.5	2	2.1
71-80%	0	0.0	0	0.0	0	0.0	0	0.0
81-90%	0	0.0	0	0.0	0	0.0	0	0.0
90-100%	4	1.0	3	1.6	1	0.5	2	2.1
Hard to answer/no answer	347	89.7	163	85.3	184	93.9	73	75.3
Total	387	100.0	191	100.0	196	100.0	97	100.0

4. Number of Hungarian employees who worked at foreign subsidiaries of the company group (Common: Q22)

(a) In 2003

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
0 person	32	8.3	21	11.0	11	5.6	88	90.7
1-10 persons	1	0.3	1	0.5	0	0.0	8	8.2
11-20 persons	0	0.0	0	0.0	0	0.0	1	1.0
21-30 persons	0	0.0	0	0.0	0	0.0	0	0.0
31-40 persons	1	0.3	1	0.5	0	0.0	0	0.0
41-50 persons	0	0.0	0	0.0	0	0.0	0	0.0
51-60 persons	0	0.0	0	0.0	0	0.0	0	0.0
61-70 persons	0	0.0	0	0.0	0	0.0	0	0.0
71-80 persons	1	0.3	1	0.5	0	0.0	0	0.0
81-90 persons	0	0.0	0	0.0	0	0.0	0	0.0
91-100 persons	0	0.0	0	0.0	0	0.0	0	0.0
100 or more	1	0.3	1	0.5	0	0.0	0	0.0
Hard to answer/no answer	351	90.7	166	86.9	185	94.4	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

(b) In 2007

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
0 person	31	8.0	19	9.9	12	6.1	82	84.5
1-10 persons	3	0.8	3	1.6	0	0.0	12	12.4
11-20 persons	1	0.3	1	0.5	0	0.0	2	2.1
21-30 persons	1	0.3	1	0.5	0	0.0	0	0.0
31-40 persons	0	0.0	0	0.0	0	0.0	1	1.0
41-50 persons	0	0.0	0	0.0	0	0.0	0	0.0
51-60 persons	1	0.3	1	0.5	0	0.0	0	0.0
61-70 persons	0	0.0	0	0.0	0	0.0	0	0.0
71-80 persons	0	0.0	0	0.0	0	0.0	0	0.0
81-90 persons	0	0.0	0	0.0	0	0.0	0	0.0
91-100 persons	0	0.0	0	0.0	0	0.0	0	0.0
100 or more	1	0.3	1	0.5	0	0.0	0	0.0
Hard to answer/no answer	349	90.2	165	86.4	184	93.9	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

5. Nationality of the managing director (Common: Q23)

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
Native	16	4.1	10	5.2	6	3.1	63	64.9
Foreigner	28	7.2	20	10.5	8	4.1	28	28.9
Hard to answer/no answer	343	88.6	161	84.3	182	92.9	6	6.2
Total	387	100.0	191	100.0	196	100.0	97	100.0

6. Who is responsible for the following business functions? (Common: Q24)

(a) Finance and accounting

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
Foreign manager	4	1.0	1	0.5	3	1.5	24	24.7
Local manager	39	10.1	29	15.2	10	5.1	22	22.7
Hard to answer/no answer	344	88.9	161	84.3	183	93.4	51	52.6
Total	387	100.0	191	100.0	196	100.0	97	100.0

(b) Human resources management

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
Foreign manager	8	2.1	4	2.1	4	2.0	11	11.3
Local manager	33	8.5	24	12.6	9	4.6	35	36.1
Hard to answer/no answer	346	89.4	163	85.3	183	93.4	51	52.6
Total	387	100.0	191	100.0	196	100.0	97	100.0

(c) Production

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
Foreign manager	8	2.1	6	3.1	2	1.0	19	19.6
Local manager	29	7.5	20	10.5	9	4.6	27	27.8
Hard to answer/no answer	350	90.4	165	86.4	185	94.4	51	52.6
Total	387	100.0	191	100.0	196	100.0	97	100.0

(d) Quality control

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
Foreign manager	8	2.1	4	2.1	4	2.0	20	20.6
Local manager	32	8.3	24	12.6	8	4.1	26	26.8
Hard to answer/no answer	347	89.7	163	85.3	184	93.9	51	52.6
Total	387	100.0	191	100.0	196	100.0	97	100.0

(e) Sales and marketing

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
Foreign manager	13	3.4	10	5.2	3	1.5	14	14.4
Local manager	26	6.7	16	8.4	10	5.1	32	33.0
Hard to answer/no answer	348	89.9	165	86.4	183	93.4	51	52.6
Total	387	100.0	191	100.0	196	100.0	97	100.0

(f) Customer service

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
Foreign manager	5	1.3	4	2.1	1	0.5	16	16.5
Local manager	29	7.5	18	9.4	11	5.6	30	30.9
Hard to answer/no answer	353	91.2	169	88.5	184	93.9	51	52.6
Total	387	100.0	191	100.0	196	100.0	97	100.0

(g) IT

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
Foreign manager	8	2.1	7	3.7	1	0.5	18	18.6
Local manager	32	8.3	21	11.0	11	5.6	28	28.9
Hard to answer/no answer	347	89.7	163	85.3	184	93.9	51	52.6
Total	387	100.0	191	100.0	196	100.0	97	100.0

(h) Research and development

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
Foreign manager	14	3.6	11	5.8	3	1.5	16	16.5
Local manager	19	4.9	11	5.8	8	4.1	30	30.9
Hard to answer/no answer	354	91.5	169	88.5	185	94.4	51	52.6
Total	387	100.0	191	100.0	196	100.0	97	100.0

7. To what extent do the local managers participate in managing the business processes? (Common: Q25)

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
Implement the standards of the parent firm	7	1.8	4	2.1	3	1.5	15	15.5
Implement the standards of the parent firm but actively take part in the further development of these standards	7	1.8	4	2.1	3	1.5	23	23.7
Adapt the standards of the parent firm according to the local needs	17	4.4	9	4.7	8	4.1	24	24.7
Create its business processes independently while following the parent company's policies	26	6.7	14	7.3	12	6.1	26	26.8
Create its business processes independently from the parent company's policy	2	0.5	0	0.0	2	1.0	9	9.3
Implement the standards of the customers (e.g. outsourcing of business processes)	5	1.3	2	1.0	3	1.5	8	8.2
Hard to answer/no answer	323	83.5	158	82.7	165	84.2	0	0.0
Total	387	100.0	191	100.0	196	100.0	105	108.2

8. How do you evaluate the similarities and differences between the HRM practices of your firm and those of the parent company? (Common: Q26)

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
My firm implements the HRM system of the parent company.	4	1.0	2	1.0	2	1.0	6	6.2
My firm implements the HRM system of the parent firm with slight adaptation to the local	13	3.4	4	2.1	9	4.6	17	17.5
My firm creates an autonomous HRM system that corresponds to the local needs while	26	6.7	15	7.9	11	5.6	23	23.7
My firm creates an autonomous HRM system using only the local requirements.	20	5.2	11	5.8	9	4.6	5	5.2
Hard to answer/no answer	324	83.7	159	83.2	165	84.2	46	47.4
Total	387	100.0	191	100.0	196	100.0	97	100.0

9. Does your firm have a Board of Directors or a Supervisory Board? (Common: Q27)

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
Only board of directors	38	9.8	20	10.5	18	9.2	8	8.2
Both board of directors and supervisory board	44	11.4	26	13.6	18	9.2	14	14.4
None of them	302	78.0	144	75.4	158	80.6	73	75.3
Hard to answer/no answer	3	0.8	1	0.5	2	1.0	2	2.1
Total	387	100.0	191	100.0	196	100.0	97	100.0

10. Composition of the supervisory board (Common: Q28)

(a) Chairman of the supervisory board

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
Foreigner	13	3.4	11	5.8	2	1.0	6	6.2
Native	26	6.7	10	5.2	16	8.2	8	8.2
Hard to answer/no answer	350	90.4	170	89.0	180	91.8	83	85.6
Total	389	100.5	191	100.0	198	101.0	97	100.0

(b) Number of foreign supervisory board members

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
0	25	6.5	8	4.2	17	8.7	6	6.2
1	3	0.8	2	1.0	1	0.5	2	2.1
2	2	0.5	2	1.0	0	0.0	3	3.1
3	3	0.8	3	1.6	0	0.0	0	0.0
4	1	0.3	1	0.5	0	0.0	0	0.0
5	1	0.3	1	0.5	0	0.0	0	0.0
6	0	0.0	0	0.0	0	0.0	0	0.0
7	0	0.0	0	0.0	0	0.0	0	0.0
8	1	0.3	1	0.5	0	0.0	0	0.0
9	0	0.0	0	0.0	0	0.0	1	1.0
10 or more	1	0.3	1	0.5	0	0.0	2	2.1
Hard to answer/no answer	350	90.4	172	90.1	178	90.8	83	85.6
Total	387	100.0	191	100.0	196	100.0	97	100.0

(c) Number of foreign external members

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
0	33	8.5	16	8.4	17	8.7	11	11.3
1	2	0.5	1	0.5	1	0.5	0	0.0
2	0	0.0	0	0.0	0	0.0	1	1.0
3	1	0.3	1	0.5	0	0.0	0	0.0
4	0	0.0	0	0.0	0	0.0	0	0.0
5	0	0.0	0	0.0	0	0.0	1	1.0
6	0	0.0	0	0.0	0	0.0	0	0.0
7	0	0.0	0	0.0	0	0.0	0	0.0
8	0	0.0	0	0.0	0	0.0	0	0.0
9	0	0.0	0	0.0	0	0.0	1	1.0
10 or more	0	0.0	0	0.0	0	0.0	0	0.0
Hard to answer/no answer	351	90.7	173	90.6	178	90.8	83	85.6
Total	387	100.0	191	100.0	196	100.0	97	100.0

(d) Number of foreign independent directors

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
0	35	9.0	17	8.9	18	9.2	12	12.4
1	1	0.3	1	0.5	0	0.0	0	0.0
2	0	0.0	0	0.0	0	0.0	0	0.0
3	0	0.0	0	0.0	0	0.0	1	1.0
4	0	0.0	0	0.0	0	0.0	0	0.0
5	0	0.0	0	0.0	0	0.0	0	0.0
6	0	0.0	0	0.0	0	0.0	0	0.0
7	0	0.0	0	0.0	0	0.0	0	0.0
8	0	0.0	0	0.0	0	0.0	0	0.0
9	0	0.0	0	0.0	0	0.0	1	1.0
10 or more	0	0.0	0	0.0	0	0.0	0	0.0
Hard to answer/no answer	351	90.7	173	90.6	178	90.8	83	85.6
Total	387	100.0	191	100.0	196	100.0	97	100.0

11. Composition of the board of directors (Common: Q29)

(a) Chairman of the board of directors

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
Foreigner	14	3.6	13	6.8	1	0.5	0	0.0
Native	53	13.7	22	11.5	31	15.8	22	22.7
Hard to answer/no answer	320	82.7	156	81.7	164	83.7	75	77.3
Total	387	100.0	191	100.0	196	100.0	97	100.0

(b) Number of foreign board members

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
0	53	13.7	21	11.0	32	16.3	11	11.3
1	4	1.0	3	1.6	1	0.5	3	3.1
2	4	1.0	3	1.6	1	0.5	1	1.0
3	1	0.3	0	0.0	1	0.5	2	2.1
4	3	0.8	2	1.0	1	0.5	1	1.0
5	0	0.0	0	0.0	0	0.0	2	2.1
6	0	0.0	0	0.0	0	0.0	0	0.0
7	0	0.0	0	0.0	0	0.0	0	0.0
8	0	0.0	0	0.0	0	0.0	0	0.0
9	0	0.0	0	0.0	0	0.0	0	0.0
10 or more	1	0.3	1	0.5	0	0.0	2	2.1
Hard to answer/no answer	321	82.9	161	84.3	160	81.6	75	77.3
Total	387	100.0	191	100.0	196	100.0	97	100.0

(c) Number of foreign external members

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
0	63	16.3	29	15.2	34	17.3	18	18.6
1	1	0.3	1	0.5	0	0.0	0	0.0
2	1	0.3	0	0.0	1	0.5	2	2.1
3	1	0.3	0	0.0	1	0.5	2	2.1
4	0	0.0	0	0.0	0	0.0	0	0.0
5	0	0.0	0	0.0	0	0.0	0	0.0
6	0	0.0	0	0.0	0	0.0	0	0.0
7	0	0.0	0	0.0	0	0.0	0	0.0
8	0	0.0	0	0.0	0	0.0	0	0.0
9	0	0.0	0	0.0	0	0.0	0	0.0
10 or more	0	0.0	0	0.0	0	0.0	0	0.0
Hard to answer/no answer	321	82.9	161	84.3	160	81.6	75	77.3
Total	387	100.0	191	100.0	196	100.0	97	100.0

(d) Number of foreign independent directors

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
0	65	16.8	29	15.2	36	18.4	20	20.6
1	1	0.3	1	0.5	0	0.0	1	1.0
2	0	0.0	0	0.0	0	0.0	0	0.0
3	0	0.0	0	0.0	0	0.0	0	0.0
4	0	0.0	0	0.0	0	0.0	0	0.0
5	0	0.0	0	0.0	0	0.0	0	0.0
6	0	0.0	0	0.0	0	0.0	0	0.0
7	0	0.0	0	0.0	0	0.0	0	0.0
8	0	0.0	0	0.0	0	0.0	1	1.0
9	0	0.0	0	0.0	0	0.0	0	0.0
10 or more	0	0.0	0	0.0	0	0.0	0	0.0
Hard to answer/no answer	321	82.9	161	84.3	160	81.6	75	77.3
Total	387	100.0	191	100.0	196	100.0	97	100.0

Section III. Organizational Innovations within the Company

1. From 2005 through 2007, did your firm introduce the following innovative systems? (Common: Q30)

(a) New business practices for organizing work or procedures (i.e., supply chain management, business re-engineering, lean production, quality management, education/training systems)

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
Yes	100	25.8	50	26.2	50	25.5	43	44.3
No	287	74.2	141	73.8	146	74.5	54	55.7
Hard to answer/no answer	0	0.0	0	0.0	0	0.0	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

(b) New knowledge management systems to better use or exchange information, knowledge, and skills within your enterprise or to collect and interpret information from outside your enterprise

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
Yes	67	17.3	33	17.3	34	17.3	32	33.0
No	320	82.7	158	82.7	162	82.7	65	67.0
Hard to answer/no answer	0	0.0	0	0.0	0	0.0	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

(c) New methods of workplace organization for distributing responsibilities and decision-making (i.e., first use of a new system of employee responsibilities, teamwork, decentralization, and integration or de-integration of departments)

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
Yes	159	41.1	81	42.4	78	39.8	39	40.2
No	228	58.9	110	57.6	118	60.2	58	59.8
Hard to answer/no answer	0	0.0	0	0.0	0	0.0	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

(d) New methods of organizing external relations with other firms or public institutions (i.e., alliances, partnerships, outsourcing, or sub-

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
Yes	111	28.7	53	27.7	58	29.6	29	29.9
No	276	71.3	138	72.3	138	70.4	68	70.1
Hard to answer/no answer	0	0.0	0	0.0	0	0.0	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

2. Does your firm make use of some of the following methods of organizing work (Common: Q31)

(a) Job rotation

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
Yes	70	18.1	52	27.2	18	9.2	28	28.9
No	317	81.9	139	72.8	178	90.8	69	71.1
Hard to answer/no answer	0	0.0	0	0.0	0	0.0	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

(b) Teamwork

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
Yes	168	43.4	84	44.0	84	42.9	84	86.6
No	219	56.6	107	56.0	112	57.1	13	13.4
Hard to answer/no answer	0	0.0	0	0.0	0	0.0	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

(c) Systems for collection of employee proposals

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
Yes	184	47.5	86	45.0	98	50.0	40	41.2
No	203	52.5	105	55.0	98	50.0	57	58.8
Hard to answer/no answer	0	0.0	0	0.0	0	0.0	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

(d) Quality circles/groups

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
Yes	131	33.9	86	45.0	45	23.0	14	14.4
No	256	66.1	105	55.0	151	77.0	83	85.6
Hard to answer/no answer	0	0.0	0	0.0	0	0.0	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

(e) Cross-occupational working groups

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
Yes	70	18.1	41	21.5	29	14.8	35	36.1
No	317	81.9	150	78.5	167	85.2	62	63.9
Hard to answer/no answer	0	0.0	0	0.0	0	0.0	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

(f) Project-based work

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
Yes	114	29.5	43	22.5	71	36.2	67	69.1
No	273	70.5	148	77.5	125	63.8	30	30.9
Hard to answer/no answer	0	0.0	0	0.0	0	0.0	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

(g) Benchmarking

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
Yes	125	32.3	54	28.3	71	36.2	21	21.6
No	262	67.7	137	71.7	125	63.8	76	78.4
Hard to answer/no answer	0	0.0	0	0.0	0	0.0	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

(h) Flat organization

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
Yes	32	8.3	15	7.9	17	8.7	13	13.4
No	355	91.7	176	92.1	179	91.3	84	86.6
Hard to answer/no answer	0	0.0	0	0.0	0	0.0	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

(i) Quality Control System (e.g. ISO, TQM)

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
Yes	146	37.7	100	52.4	46	23.5	32	33.0
No	241	62.3	91	47.6	150	76.5	65	67.0
Hard to answer/no answer	0	0.0	0	0.0	0	0.0	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

3. Does your firm make use of the following flexible work and working time systems? (Multiple answer) (SS: Q32)

	Slovakia	
	Service firms	
	Number	Share (%)
Teleworking from home, once a week	13	5.9
Teleworking from home, many times a week	37	16.9
Mobil work	38	17.4
Part-time work	57	26.0
Flexible working time	74	33.8
Hard to answer/no answer	0	0.0
Total	219	100.0

4. Is your firm planning to introduce the following flexible work and working time systems in the near future? (Multiple answer) (SS: Q33)

	Slovakia	
	Service firms	
	Number	Share (%)
Teleworking from home, once a week	8	7.4
Teleworking from home, many times a week	21	19.4
Mobil work	17	15.7
Part-time work	30	27.8
Flexible working time	32	29.6
Hard to answer/no answer	0	0.0
Total	108	100.0

5. If your firm did not introduce organizational innovations from 2005 through 2007, how important were the following factors? (5-point scale evaluation) (HM: Q32; HS: Q32, SS: Q34)

(a) Introduction of organizational innovations before 2005; no need for further changes

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
1 (Not important at all)	103	26.6	55	28.8	48	24.5	10	10.3
2	12	3.1	9	4.7	3	1.5	3	3.1
3	41	10.6	30	15.7	11	5.6	8	8.2
4	34	8.8	13	6.8	21	10.7	5	5.2
5 (Very important)	113	29.2	47	24.6	66	33.7	7	7.2
Hard to answer/no answer	83	21.4	36	18.8	47	24.0	64	66.0
Total	386	99.7	190	99.5	196	100.0	97	100.0

(b) Lack of funds to implement organizational innovations

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
1 (Not important at all)	215	55.6	99	51.8	116	59.2	17	17.5
2	23	5.9	15	7.9	8	4.1	5	5.2
3	29	7.5	19	9.9	10	5.1	5	5.2
4	17	4.4	12	6.3	5	2.6	4	4.1
5 (Very important)	15	3.9	8	4.2	7	3.6	2	2.1
Hard to answer/no answer	88	22.7	38	19.9	50	25.5	64	66.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

(c) Lack of knowledge or qualified staff

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
1 (Not important at all)	222	57.4	103	53.9	119	60.7	16	16.5
2	21	5.4	15	7.9	6	3.1	5	5.2
3	27	7.0	15	7.9	12	6.1	8	8.2
4	14	3.6	10	5.2	4	2.0	2	2.1
5 (Very important)	14	3.6	10	5.2	4	2.0	4	4.1
Hard to answer/no answer	89	23.0	38	19.9	51	26.0	62	63.9
Total	387	100.0	191	100.0	196	100.0	97	100.0

(d) Employees or management resistant to organizational change

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
1 (Not important at all)	243	62.8	119	62.3	124	63.3	16	16.5
2	18	4.7	13	6.8	5	2.6	9	9.3
3	17	4.4	10	5.2	7	3.6	1	1.0
4	12	3.1	6	3.1	6	3.1	5	5.2
5 (Very important)	8	2.1	5	2.6	3	1.5	2	2.1
Hard to answer/no answer	89	23.0	38	19.9	51	26.0	64	66.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

(e) No need for organizational innovation from 2005 through 2007

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
1 (Not important at all)	114	29.5	49	25.7	65	33.2	9	9.3
2	9	2.3	7	3.7	2	1.0	5	5.2
3	42	10.9	29	15.2	13	6.6	6	6.2
4	36	9.3	19	9.9	17	8.7	2	2.1
5 (Very important)	97	25.1	50	26.2	47	24.0	8	8.2
Hard to answer/no answer	89	23.0	37	19.4	52	26.5	67	69.1
Total	387	100.0	191	100.0	196	100.0	97	100.0

6. If your firm practices teamwork, do the team members decide themselves about the following subjects? (HM: Q33; HS: Q33, SS: Q35)

(a) Division of the tasks

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
Yes	113	29.2	57	29.8	56	28.6	53	54.6
No	53	13.7	25	13.1	28	14.3	31	32.0
Hard to answer/no answer	221	57.1	109	57.1	112	57.1	13	13.4
Total	387	100.0	191	100.0	196	100.0	97	100.0

(b) Selection of the team leader

]	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
Yes	45	11.6	26	13.6	19	9.7	10	10.3
No	118	30.5	53	27.7	65	33.2	72	74.2
Hard to answer/no answer	224	57.9	112	58.6	112	57.1	15	15.5
Total	387	100.0	191	100.0	196	100.0	97	100.0

7. How important are the following factors to initiate organizational chages in your firm? (5-point scale evaluation) (HM: Q34; HS: Q34, SS: Q36)

(a) Improvement of the effectiveness of daily work

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
1 (Not important at all)	14	3.6	4	2.1	10	5.1	11	11.3
2	3	0.8	1	0.5	2	1.0	4	4.1
3	24	6.2	9	4.7	15	7.7	17	17.5
4	84	21.7	45	23.6	39	19.9	21	21.6
5 (Very important)	228	58.9	122	63.9	106	54.1	44	45.4
Hard to answer/no answer	34	8.8	10	5.2	24	12.2	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

(b) Strengthening of the cooperation and coordination within the organization

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
1 (Not important at all)	25	6.5	8	4.2	17	8.7	18	18.6
2	9	2.3	4	2.1	5	2.6	4	4.1
3	40	10.3	14	7.3	26	13.3	23	23.7
4	100	25.8	56	29.3	44	22.4	32	33.0
5 (Very important)	179	46.3	99	51.8	80	40.8	20	20.6
Hard to answer/no answer	34	8.8	10	5.2	24	12.2	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

(c) Adapting to environmental changes

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
1 (Not important at all)	19	4.9	5	2.6	14	7.1	14	14.4
2	19	4.9	9	4.7	10	5.1	5	5.2
3	41	10.6	19	9.9	22	11.2	17	17.5
4	101	26.1	58	30.4	43	21.9	31	32.0
5 (Very important)	173	44.7	90	47.1	83	42.3	30	30.9
Hard to answer/no answer	34	8.8	10	5.2	24	12.2	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

(d) Continuous renewal of products/services

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
1 (Not important at all)	26	6.7	8	4.2	18	9.2	24	24.7
2	15	3.9	7	3.7	8	4.1	14	14.4
3	57	14.7	23	12.0	34	17.3	24	24.7
4	95	24.5	57	29.8	38	19.4	14	14.4
5 (Very important)	159	41.1	86	45.0	73	37.2	21	21.6
Hard to answer/no answer	35	9.0	10	5.2	25	12.8	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

(e) Continuous renewal of knowledge and know-how

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
1 (Not important at all)	13	3.4	4	2.1	9	4.6	15	15.5
2	20	5.2	9	4.7	11	5.6	4	4.1
3	50	12.9	25	13.1	25	12.8	24	24.7
4	95	24.5	55	28.8	40	20.4	22	22.7
5 (Very important)	174	45.0	87	45.5	87	44.4	31	32.0
Hard to answer/no answer	35	9.0	11	5.8	24	12.2	1	1.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

(f) Outsourcing activities

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
1 (Not important at all)	102	26.4	45	23.6	57	29.1	36	37.1
2	34	8.8	21	11.0	13	6.6	21	21.6
3	55	14.2	31	16.2	24	12.2	24	24.7
4	68	17.6	37	19.4	31	15.8	9	9.3
5 (Very important)	89	23.0	45	23.6	44	22.4	7	7.2
Hard to answer/no answer	39	10.1	12	6.3	27	13.8	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

(g) Improvement of the quality and customer service

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
1 (Not important at all)	23	5.9	5	2.6	18	9.2	11	11.3
2	6	1.6	2	1.0	4	2.0	4	4.1
3	34	8.8	17	8.9	17	8.7	12	12.4
4	103	26.6	57	29.8	46	23.5	27	27.8
5 (Very important)	185	47.8	100	52.4	85	43.4	41	42.3
Hard to answer/no answer	36	9.3	10	5.2	26	13.3	2	2.1
Total	387	100.0	191	100.0	196	100.0	97	100.0

(h) Increase of the firm size

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
1 (Not important at all)	53	13.7	23	12.0	30	15.3	21	21.6
2	35	9.0	21	11.0	14	7.1	11	11.3
3	85	22.0	44	23.0	41	20.9	29	29.9
4	80	20.7	47	24.6	33	16.8	18	18.6
5 (Very important)	96	24.8	44	23.0	52	26.5	18	18.6
Hard to answer/no answer	38	9.8	12	6.3	26	13.3	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

8. Intensity of competition with other subsidiaries of the company group and other competitors in the market (5-point scale evaluation) (HM: Q35; HS: Q35, SS: Q37)

(a) Competition with other subsidiaries of the company group, which your firm belongs to

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
1 (No competition at all)	36	9.3	21	11.0	15	7.7	32	33.0
2	17	4.4	5	2.6	12	6.1	10	10.3
3	11	2.8	7	3.7	4	2.0	5	5.2
4	17	4.4	13	6.8	4	2.0	1	1.0
5 (Very intensive)	6	1.6	5	2.6	1	0.5	1	1.0
Hard to answer/no answer	300	77.5	140	73.3	160	81.6	48	49.5
Total	387	100.0	191	100.0	196	100.0	97	100.0

(b) Competition with companies except for firms belonging to your company group

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
1 (No competition at all)	19	4.9	11	5.8	8	4.1	2	2.1
2	4	1.0	3	1.6	1	0.5	6	6.2
3	42	10.9	18	9.4	24	12.2	33	34.0
4	115	29.7	50	26.2	65	33.2	17	17.5
5 (Very intensive)	126	32.6	58	30.4	68	34.7	39	40.2
Hard to answer/no answer	81	20.9	51	26.7	30	15.3	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

9. In comparison with your competitors, how important are the following factors that influence the performance of your firm? (5-point scale evaluation) (HM: Q36; HS: Q36, SS: Q38)

(a) Prices

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
1 (Not important at all)	16	4.1	3	1.6	13	6.6	11	11.3
2	11	2.8	4	2.1	7	3.6	4	4.1
3	34	8.8	13	6.8	21	10.7	22	22.7
4	69	17.8	40	20.9	29	14.8	27	27.8
5 (Very important)	247	63.8	129	67.5	118	60.2	33	34.0
Hard to answer/no answer	10	2.6	2	1.0	8	4.1	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

(b) Customer orientation

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
1 (Not important at all)	18	4.7	1	0.5	17	8.7	8	8.2
2	7	1.8	4	2.1	3	1.5	3	3.1
3	26	6.7	13	6.8	13	6.6	7	7.2
4	81	20.9	42	22.0	39	19.9	24	24.7
5 (Very important)	245	63.3	128	67.0	117	59.7	55	56.7
Hard to answer/no answer	10	2.6	3	1.6	7	3.6	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

(c) Quality

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
1 (Not important at all)	11	2.8	1	0.5	10	5.1	9	9.3
2	2	0.5	0	0.0	2	1.0	1	1.0
3	8	2.1	1	0.5	7	3.6	8	8.2
4	50	12.9	22	11.5	28	14.3	25	25.8
5 (Very important)	306	79.1	165	86.4	141	71.9	54	55.7
Hard to answer/no answer	10	2.6	2	1.0	8	4.1	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

(d) Respecting deadlines and flexibility

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
1 (Not important at all)	12	3.1	1	0.5	11	5.6	6	6.2
2	1	0.3	0	0.0	1	0.5	4	4.1
3	12	3.1	2	1.0	10	5.1	11	11.3
4	70	18.1	37	19.4	33	16.8	24	24.7
5 (Very important)	282	72.9	148	77.5	134	68.4	52	53.6
Hard to answer/no answer	10	2.6	3	1.6	7	3.6	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

(e) Versatility of products/services

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
1 (Not important at all)	28	7.2	8	4.2	20	10.2	24	24.7
2	17	4.4	5	2.6	12	6.1	18	18.6
3	49	12.7	24	12.6	25	12.8	26	26.8
4	104	26.9	65	34.0	39	19.9	19	19.6
5 (Very important)	178	46.0	87	45.5	91	46.4	10	10.3
Hard to answer/no answer	11	2.8	2	1.0	9	4.6	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

(f) Image and brand of the firm

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
1 (Not important at all)	45	11.6	17	8.9	28	14.3	8	8.2
2	15	3.9	9	4.7	6	3.1	7	7.2
3	76	19.6	41	21.5	35	17.9	24	24.7
4	90	23.3	47	24.6	43	21.9	29	29.9
5 (Very important)	151	39.0	75	39.3	76	38.8	29	29.9
Hard to answer/no answer	10	2.6	2	1.0	8	4.1	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

(g) Continuous product/service development

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
1 (Not important at all)	26	6.7	5	2.6	21	10.7	9	9.3
2	16	4.1	8	4.2	8	4.1	13	13.4
3	47	12.1	22	11.5	25	12.8	20	20.6
4	104	26.9	63	33.0	41	20.9	26	26.8
5 (Very important)	184	47.5	91	47.6	93	47.4	29	29.9
Hard to answer/no answer	10	2.6	2	1.0	8	4.1	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

(h) Skilled labor

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
1 (Not important at all)	13	3.4	4	2.1	9	4.6	8	8.2
2	9	2.3	4	2.1	5	2.6	3	3.1
3	29	7.5	19	9.9	10	5.1	11	11.3
4	83	21.4	51	26.7	32	16.3	29	29.9
5 (Very important)	243	62.8	111	58.1	132	67.3	46	47.4
Hard to answer/no answer	10	2.6	2	1.0	8	4.1	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

(i) Experiences

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
1 (Not important at all)	11	2.8	2	1.0	9	4.6	7	7.2
2	1	0.3	0	0.0	1	0.5	4	4.1
3	19	4.9	8	4.2	11	5.6	11	11.3
4	91	23.5	51	26.7	40	20.4	26	26.8
5 (Very important)	256	66.1	128	67.0	128	65.3	49	50.5
Hard to answer/no answer	9	2.3	2	1.0	7	3.6	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

(j) Reliability

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
1 (Not important at all)	8	2.1	1	0.5	7	3.6	8	8.2
2	1	0.3	0	0.0	1	0.5	3	3.1
3	8	2.1	3	1.6	5	2.6	8	8.2
4	59	15.2	34	17.8	25	12.8	15	15.5
5 (Very important)	302	78.0	151	79.1	151	77.0	63	64.9
Hard to answer/no answer	9	2.3	2	1.0	7	3.6	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

(k) Lobbying

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
1 (Not important at all)	97	25.1	47	24.6	50	25.5	60	61.9
2	26	6.7	13	6.8	13	6.6	6	6.2
3	35	9.0	24	12.6	11	5.6	15	15.5
4	68	17.6	45	23.6	23	11.7	8	8.2
5 (Very important)	75	19.4	35	18.3	40	20.4	8	8.2
Hard to answer/no answer	86	22.2	27	14.1	59	30.1	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

10. The extent of ICT use on the following areas (HM: Q37; HS: Q37, SS: Q39)

(a) Information processing/communication (e.g. external/internal communication)

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
10% or less	60	15.5	57	29.8	3	1.5	8	8.2
11-20%	27	7.0	13	6.8	14	7.1	3	3.1
21-30%	32	8.3	12	6.3	20	10.2	3	3.1
31-40%	21	5.4	14	7.3	7	3.6	4	4.1
41-50%	34	8.8	23	12.0	11	5.6	5	5.2
51-60%	19	4.9	7	3.7	12	6.1	3	3.1
61-70%	13	3.4	5	2.6	8	4.1	8	8.2
71-80%	34	8.8	17	8.9	17	8.7	16	16.5
81-90%	39	10.1	11	5.8	28	14.3	13	13.4
91-100%	91	23.5	31	16.2	60	30.6	34	35.1
Hard to answer/no answer	17	4.4	1	0.5	16	8.2	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

(b) Greater flexibility in production and knowledge use

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
10% or less	118	30.5	97	50.8	21	10.7	23	23.7
11-20%	37	9.6	16	8.4	21	10.7	11	11.3
21-30%	30	7.8	15	7.9	15	7.7	7	7.2
31-40%	20	5.2	10	5.2	10	5.1	3	3.1
41-50%	26	6.7	16	8.4	10	5.1	8	8.2
51-60%	3	0.8	2	1.0	1	0.5	5	5.2
61-70%	5	1.3	3	1.6	2	1.0	7	7.2
71-80%	14	3.6	8	4.2	6	3.1	6	6.2
81-90%	20	5.2	5	2.6	15	7.7	10	10.3
91-100%	41	10.6	13	6.8	28	14.3	17	17.5
Hard to answer/no answer	73	18.9	6	3.1	67	34.2	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

(c) Continuous development of products/services

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
10% or less	130	33.6	111	58.1	19	9.7	31	32.0
11-20%	27	7.0	20	10.5	7	3.6	7	7.2
21-30%	27	7.0	10	5.2	17	8.7	8	8.2
31-40%	28	7.2	5	2.6	23	11.7	3	3.1
41-50%	36	9.3	13	6.8	23	11.7	6	6.2
51-60%	12	3.1	6	3.1	6	3.1	3	3.1
61-70%	10	2.6	3	1.6	7	3.6	4	4.1
71-80%	19	4.9	9	4.7	10	5.1	9	9.3
81-90%	15	3.9	0	0.0	15	7.7	6	6.2
91-100%	37	9.6	6	3.1	31	15.8	20	20.6
Hard to answer/no answer	46	11.9	8	4.2	38	19.4	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

Section IV. Work Organization and Knowledge Use

1. Which characteristics of human resources are important for the improvement of the firm's performance? (5-point scale evaluation) (HM: Q38; HS: Q38, SS: Q40)

(a) Professional-technical knowledge

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
1 (Not important at all)	3	0.8	0	0.0	3	1.5	4	4.1
2	3	0.8	2	1.0	1	0.5	1	1.0
3	12	3.1	5	2.6	7	3.6	7	7.2
4	64	16.5	39	20.4	25	12.8	20	20.6
5 (Very important)	303	78.3	145	75.9	158	80.6	65	67.0
Hard to answer/no answer	2	0.5	0	0.0	2	1.0	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

(b) Experience and competence

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
1 (Not important at all)	7	1.8	0	0.0	7	3.6	5	5.2
2	5	1.3	0	0.0	5	2.6	2	2.1
3	32	8.3	6	3.1	26	13.3	7	7.2
4	105	27.1	46	24.1	59	30.1	32	33.0
5 (Very important)	236	61.0	139	72.8	97	49.5	51	52.6
Hard to answer/no answer	2	0.5	0	0.0	2	1.0	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

(c) Managerial-organizational skill

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
1 (Not important at all)	27	7.0	15	7.9	12	6.1	3	3.1
2	26	6.7	14	7.3	12	6.1	1	1.0
3	81	20.9	33	17.3	48	24.5	19	19.6
4	107	27.6	52	27.2	55	28.1	29	29.9
5 (Very important)	141	36.4	76	39.8	65	33.2	45	46.4
Hard to answer/no answer	5	1.3	1	0.5	4	2.0	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

(d) Customer orientation

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
1 (Not important at all)	9	2.3	4	2.1	5	2.6	6	6.2
2	6	1.6	2	1.0	4	2.0	1	1.0
3	25	6.5	16	8.4	9	4.6	10	10.3
4	91	23.5	57	29.8	34	17.3	18	18.6
5 (Very important)	252	65.1	112	58.6	140	71.4	62	63.9
Hard to answer/no answer	4	1.0	0	0.0	4	2.0	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

(e) Creativity, innovative skills

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
1 (Not important at all)	12	3.1	3	1.6	9	4.6	6	6.2
2	9	2.3	5	2.6	4	2.0	5	5.2
3	51	13.2	29	15.2	22	11.2	21	21.6
4	120	31.0	69	36.1	51	26.0	29	29.9
5 (Very important)	193	49.9	85	44.5	108	55.1	36	37.1
Hard to answer/no answer	2	0.5	0	0.0	2	1.0	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

(f) Ability to cooperate

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
1 (Not important at all)	7	1.8	0	0.0	7	3.6	7	7.2
2	2	0.5	1	0.5	1	0.5	1	1.0
3	29	7.5	15	7.9	14	7.1	15	15.5
4	87	22.5	43	22.5	44	22.4	34	35.1
5 (Very important)	259	66.9	132	69.1	127	64.8	40	41.2
Hard to answer/no answer	3	0.8	0	0.0	3	1.5	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

(g) Language skills

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
1 (Not important at all)	37	9.6	14	7.3	23	11.7	8	8.2
2	44	11.4	26	13.6	18	9.2	9	9.3
3	103	26.6	70	36.6	33	16.8	34	35.1
4	90	23.3	47	24.6	43	21.9	19	19.6
5 (Very important)	110	28.4	33	17.3	77	39.3	27	27.8
Hard to answer/no answer	3	0.8	1	0.5	2	1.0	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

(h) Problem-solving ability

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
1 (Not important at all)	7	1.8	0	0.0	7	3.6	6	6.2
2	2	0.5	1	0.5	1	0.5	1	1.0
3	27	7.0	18	9.4	9	4.6	10	10.3
4	81	20.9	41	21.5	40	20.4	38	39.2
5 (Very important)	268	69.3	131	68.6	137	69.9	41	42.3
Hard to answer/no answer	2	0.5	0	0.0	2	1.0	1	1.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

(i) General IT skills

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
1 (Not important at all)	19	4.9	7	3.7	12	6.1	8	8.2
2	36	9.3	26	13.6	10	5.1	6	6.2
3	94	24.3	65	34.0	29	14.8	37	38.1
4	126	32.6	65	34.0	61	31.1	28	28.9
5 (Very important)	107	27.6	25	13.1	82	41.8	18	18.6
Hard to answer/no answer	5	1.3	3	1.6	2	1.0	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

(j) Communications skills

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
1 (Not important at all)	10	2.6	4	2.1	6	3.1	5	5.2
2	6	1.6	6	3.1	0	0.0	2	2.1
3	55	14.2	40	20.9	15	7.7	17	17.5
4	115	29.7	70	36.6	45	23.0	30	30.9
5 (Very important)	199	51.4	71	37.2	128	65.3	43	44.3
Hard to answer/no answer	2	0.5	0	0.0	2	1.0	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

(k) Punctuality and reliability

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
1 (Not important at all)	3	0.8	0	0.0	3	1.5	7	7.2
2	1	0.3	1	0.5	0	0.0	0	0.0
3	4	1.0	2	1.0	2	1.0	3	3.1
4	49	12.7	24	12.6	25	12.8	19	19.6
5 (Very important)	326	84.2	164	85.9	162	82.7	68	70.1
Hard to answer/no answer	4	1.0	0	0.0	4	2.0	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

2. Share of employees with a university or college degree (HM: Q39; HS: Q39, SS: Q41)

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
10% or less	159	41.1	136	71.2	23	11.7	7	7.2
11-20%	55	14.2	34	17.8	21	10.7	2	2.1
21-30%	24	6.2	11	5.8	13	6.6	4	4.1
31-40%	19	4.9	3	1.6	16	8.2	5	5.2
41-50%	15	3.9	0	0.0	15	7.7	6	6.2
51-60%	14	3.6	0	0.0	14	7.1	7	7.2
61-70%	25	6.5	1	0.5	24	12.2	5	5.2
71-80%	19	4.9	0	0.0	19	9.7	18	18.6
81-90%	13	3.4	0	0.0	13	6.6	22	22.7
91-100%	27	7.0	0	0.0	27	13.8	21	21.6
Hard to answer/no answer	17	4.4	6	3.1	11	5.6	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

3. What attention is devoted by the management to the continuous skill development of employees? (5-point scale evaluation) (HM: Q40; HS: Q42,

(a) On-the-job training

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
1 (Not important at all)	79	20.4	40	20.9	39	19.9	13	13.4
2	35	9.0	21	11.0	14	7.1	11	11.3
3	65	16.8	33	17.3	32	16.3	19	19.6
4	105	27.1	50	26.2	55	28.1	21	21.6
5 (Very important)	100	25.8	47	24.6	53	27.0	33	34.0
Hard to answer/no answer	3	0.8	0	0.0	3	1.5	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

(b) Consultation with managers/other employees

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
1 (Not important at all)	51	13.2	22	11.5	29	14.8	8	8.2
2	24	6.2	12	6.3	12	6.1	4	4.1
3	62	16.0	35	18.3	27	13.8	23	23.7
4	133	34.4	78	40.8	55	28.1	31	32.0
5 (Very important)	113	29.2	43	22.5	70	35.7	31	32.0
Hard to answer/no answer	4	1.0	1	0.5	3	1.5	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

(c) Job rotation

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
1 (Not important at all)	187	48.3	75	39.3	112	57.1	43	44.3
2	53	13.7	26	13.6	27	13.8	18	18.6
3	70	18.1	34	17.8	36	18.4	16	16.5
4	48	12.4	33	17.3	15	7.7	13	13.4
5 (Very important)	28	7.2	23	12.0	5	2.6	7	7.2
Hard to answer/no answer	1	0.3	0	0.0	1	0.5	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

(d) Teamwork

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
1 (Not important at all)	107	27.6	43	22.5	64	32.7	14	14.4
2	36	9.3	16	8.4	20	10.2	5	5.2
3	77	19.9	46	24.1	31	15.8	13	13.4
4	92	23.8	50	26.2	42	21.4	29	29.9
5 (Very important)	74	19.1	36	18.8	38	19.4	36	37.1
Hard to answer/no answer	1	0.3	0	0.0	1	0.5	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

(e) Supporting cooperation between various organizational units

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
1 (Not important at all)	92	23.8	39	20.4	53	27.0	22	22.7
2	43	11.1	19	9.9	24	12.2	4	4.1
3	91	23.5	48	25.1	43	21.9	22	22.7
4	88	22.7	51	26.7	37	18.9	34	35.1
5 (Very important)	69	17.8	33	17.3	36	18.4	15	15.5
Hard to answer/no answer	4	1.0	1	0.5	3	1.5	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

(f) Participation in formal trainings

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
1 (Not important at all)	153	39.5	85	44.5	68	34.7	20	20.6
2	83	21.4	45	23.6	38	19.4	17	17.5
3	89	23.0	42	22.0	47	24.0	22	22.7
4	37	9.6	16	8.4	21	10.7	17	17.5
5 (Very important)	23	5.9	3	1.6	20	10.2	21	21.6
Hard to answer/no answer	2	0.5	0	0.0	2	1.0	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

(g) Training tailored to the needs of the firm (e.g., language courses, further professional training)

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
1 (Not important at all)	102	26.4	55	28.8	47	24.0	17	17.5
2	48	12.4	28	14.7	20	10.2	10	10.3
3	93	24.0	49	25.7	44	22.4	11	11.3
4	78	20.2	35	18.3	43	21.9	26	26.8
5 (Very important)	65	16.8	24	12.6	41	20.9	33	34.0
Hard to answer/no answer	1	0.3	0	0.0	1	0.5	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

(h) Visiting exhibitions and fairs

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
1 (Not important at all)	72	18.6	26	13.6	46	23.5	35	36.1
2	42	10.9	23	12.0	19	9.7	26	26.8
3	95	24.5	71	37.2	24	12.2	20	20.6
4	109	28.2	50	26.2	59	30.1	12	12.4
5 (Very important)	66	17.1	20	10.5	46	23.5	4	4.1
Hard to answer/no answer	3	0.8	1	0.5	2	1.0	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

4. Ratio of employees participating in various training courses organized and financed by the firm (HM: Q41; HS: Q41, SS: Q43)

(a) Training organized and financed by the firm (e.g., language courses, further professional training)

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
10% or less	146	37.7	133	69.6	13	6.6	25	25.8
11-20%	38	9.8	17	8.9	21	10.7	9	9.3
21-30%	20	5.2	10	5.2	10	5.1	7	7.2
31-40%	9	2.3	5	2.6	4	2.0	1	1.0
41-50%	15	3.9	4	2.1	11	5.6	8	8.2
51-60%	9	2.3	3	1.6	6	3.1	1	1.0
61-70%	16	4.1	3	1.6	13	6.6	8	8.2
71-80%	15	3.9	6	3.1	9	4.6	11	11.3
81-90%	10	2.6	3	1.6	7	3.6	12	12.4
91-100%	21	5.4	3	1.6	18	9.2	15	15.5
Hard to answer/no answer	88	22.7	4	2.1	84	42.9	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

(b) Training initiated by the employee but financed by the employer (e.g., external training, participation at conferences)

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
10% or less	196	50.6	157	82.2	39	19.9	47	48.5
11–20%	26	6.7	9	4.7	17	8.7	13	13.4
21–30%	11	2.8	3	1.6	8	4.1	11	11.3
31–40%	5	1.3	1	0.5	4	2.0	4	4.1
41–50%	17	4.4	6	3.1	11	5.6	9	9.3
51–60%	1	0.3	0	0.0	1	0.5	4	4.1
61–70%	8	2.1	2	1.0	6	3.1	1	1.0
71–80%	7	1.8	2	1.0	5	2.6	2	2.1
81–90%	2	0.5	0	0.0	2	1.0	1	1.0
91–100%	8	2.1	3	1.6	5	2.6	5	5.2
Hard to answer/no answer	106	27.4	8	4.2	98	50.0	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

(c) Training not financed by the employer but supported with reduced working time (e.g., second degree/diploma)

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
10% or less	217	56.1	177	92.7	40	20.4	73	75.3
11–20%	11	2.8	0	0.0	11	5.6	11	11.3
21–30%	7	1.8	1	0.5	6	3.1	7	7.2
31–40%	1	0.3	0	0.0	1	0.5	1	1.0
41–50%	3	0.8	1	0.5	2	1.0	1	1.0
51–60%	2	0.5	1	0.5	1	0.5	0	0.0
61–70%	1	0.3	0	0.0	1	0.5	1	1.0
71–80%	1	0.3	0	0.0	1	0.5	0	0.0
81–90%	0	0.0	0	0.0	0	0.0	0	0.0
91–100%	0	0.0	0	0.0	0	0.0	3	3.1
Hard to answer/no answer	144	37.2	11	5.8	133	67.9	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

5. What kind of training courses are organized and financed by the employer? (HM: Q42; HS: Q42, SS: Q44)

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
Exclusively work-related skills (e.g. quality assurance, professional skill development)	123	31.8	62	32.5	61	31.1	27	27.8
Exclusively generic skills (e.g. language, communication skills)	16	4.1	8	4.2	8	4.1	1	1.0
Both generic and work-related skills	123	31.8	55	28.8	68	34.7	56	57.7
Hard to answer/no answer	125	32.3	66	34.6	59	30.1	13	13.4
Total	387	100.0	191	100.0	196	100.0	97	100.0

6. To what extent does your firm rely on the following groups in developing organizational knowledge? (HM: Q43; HS: Q43, SS: Q45)

(a) Customers

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
Regulary	230	59.4	108	56.5	122	62.2	37	38.1
Occasionaly	101	26.1	72	37.7	29	14.8	35	36.1
Never	54	14.0	11	5.8	43	21.9	25	25.8
Hard to answer/no answer	2	0.5	0	0.0	2	1.0	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

(b) Various suppliers (e.g. parts, services)

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
Regulary	121	31.3	68	35.6	53	27.0	39	40.2
Occasionaly	148	38.2	79	41.4	69	35.2	39	40.2
Never	115	29.7	43	22.5	72	36.7	19	19.6
Hard to answer/no answer	3	0.8	1	0.5	2	1.0	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

(c) Consulting firms

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
Regulary	25	6.5	11	5.8	14	7.1	31	32.0
Occasionaly	149	38.5	62	32.5	87	44.4	54	55.7
Never	210	54.3	117	61.3	93	47.4	12	12.4
Hard to answer/no answer	3	0.8	1	0.5	2	1.0	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

(d) Higher-education institutions

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
Regulary	15	3.9	4	2.1	11	5.6	43	44.3
Occasionaly	90	23.3	46	24.1	44	22.4	48	49.5
Never	280	72.4	141	73.8	139	70.9	6	6.2
Hard to answer/no answer	2	0.5	0	0.0	2	1.0	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

(e) Other educational training agencies

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
Regulary	19	4.9	6	3.1	13	6.6	33	34.0
Occasionaly	103	26.6	59	30.9	44	22.4	53	54.6
Never	263	68.0	126	66.0	137	69.9	11	11.3
Hard to answer/no answer	2	0.5	0	0.0	2	1.0	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

(f) Research institutes

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
Regulary	16	4.1	4	2.1	12	6.1	69	71.1
Occasionaly	68	17.6	37	19.4	31	15.8	26	26.8
Never	301	77.8	150	78.5	151	77.0	2	2.1
Hard to answer/no answer	2	0.5	0	0.0	2	1.0	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

(g) Development agencies

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
Regulary	4	1.0	2	1.0	2	1.0	74	76.3
Occasionaly	71	18.3	22	11.5	49	25.0	19	19.6
Never	309	79.8	167	87.4	142	72.4	4	4.1
Hard to answer/no answer	3	0.8	0	0.0	3	1.5	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0

(i) Other professional and labor market organizations

	Hungary						Slovakia	
	(A) All firms		(B) Manufacturing firms		(C) Service firms		(D) Service firms	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
Regulary	22	5.7	11	5.8	11	5.6	55	56.7
Occasionaly	77	19.9	41	21.5	36	18.4	35	36.1
Never	281	72.6	137	71.7	144	73.5	7	7.2
Hard to answer/no answer	7	1.8	2	1.0	5	2.6	0	0.0
Total	387	100.0	191	100.0	196	100.0	97	100.0