

# **FTA EXPORTER SURVEY REPORT**

An Exporter Response to New Zealand's Current and Emerging FTA Markets

*Hong Kong, India, Korea, Trans-Pacific Partnership (TPP)*

TPLU  
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# **1 SURVEY BACKGROUND**

Free Trade Agreements (FTA) are designed to reduce barriers to trade with overseas markets, making it easier for New Zealand businesses to do trade (in the form of goods, services and investment) with and within those countries. They seek to make the business environment more transparent, efficient and ultimately more profitable for companies.

There is also a defensive angle to our FTAs - to ensure that New Zealand businesses are not disadvantaged in comparison to other foreign competitors whose Governments already have, or are in the process of, pursuing similar FTAs.

A core part of the negotiation process includes seeking the feedback of New Zealand businesses in order to understand any trade barrier issues they experience in accessing overseas markets.

## **1.1 PURPOSE**

The purpose of the FTA Exporter Survey was to:

- identify specific interests of concern from a broad range of businesses who have been identified as exporters to our target (FTA) markets;
- contribute to FTA negotiation teams' understanding of the types of business activity being carried out in those markets;
- provide information on how export is taking place – i.e. are goods being shipped offshore, are goods being produced and sold in a foreign market, are companies providing both goods and services;
- seek open lines of communication for further engagement between officials and businesses;
- widen the scope of companies who are engaged by officials on FTAs; and
- raise awareness of the current trade agenda.

## **1.2 MARKETS IN FOCUS**

The areas of specific focus in the survey involve New Zealand's current and emerging FTA partners, including the Trans-Pacific Partners (Australia, Brunei, Chile, Peru, Singapore, USA and Vietnam), Hong Kong, India, and Korea.

NB: With negotiations on the New Zealand-Hong Kong, China Closer Economic Partnership now concluded, the material on Hong Kong will be useful in implementing the agreement upon it entering into force.

## **1.3 SURVEY COMMISSIONERS**

The FTA Exporter Survey was conducted by The Survey Company on behalf of the Ministry of Foreign Affairs and Trade (MFAT) and New Zealand Trade and Enterprise (NZTE).

## **1.4 SURVEY DETAILS**

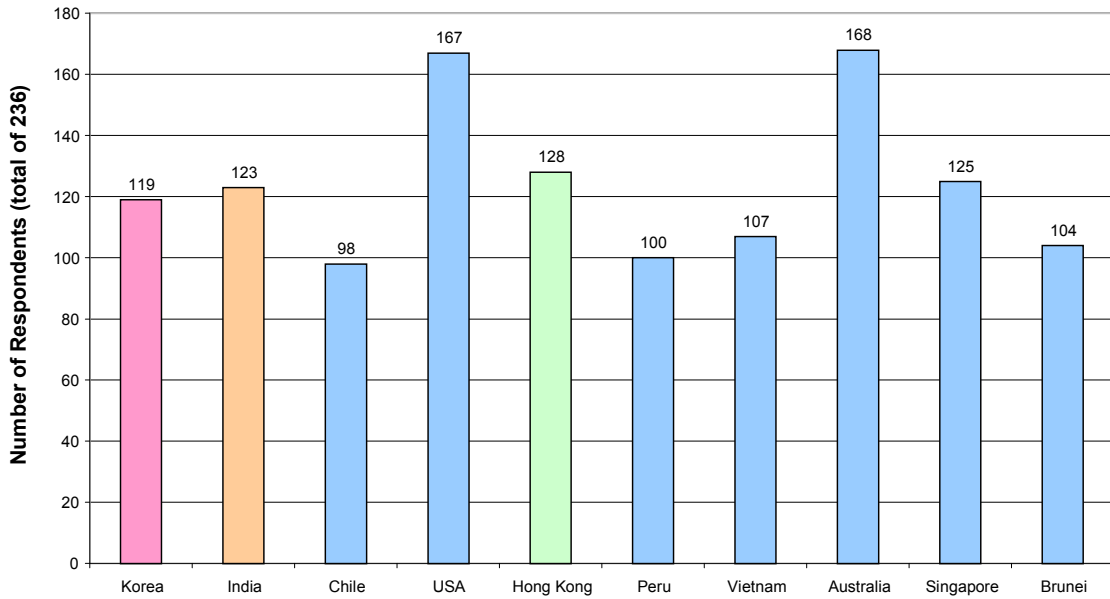
The FTA Exporter Survey was launched in August 2009 and was available as an online exercise. The database for the survey was provided by New Zealand Trade and Enterprise (NZTE).

The survey was sent to a total of 854 New Zealand businesses, and data from the 236 businesses that completed the survey were received by MFAT in October 2009. The Survey Company states that as a general benchmark, a 20% response rate is considered a reasonable result for surveys of this kind. They have therefore indicated that our 28% response rate (236/854) is an "above average" result with a confidence interval (margin of error) of only approximately  $\pm 5.4\%$ .

MFAT and NZTE have not surveyed the companies before for any trade access / FTA purposes. It is therefore the first time that information of this level has been gathered in this format and on this broad scale.

## 2 EXPORTERS' PROFILE

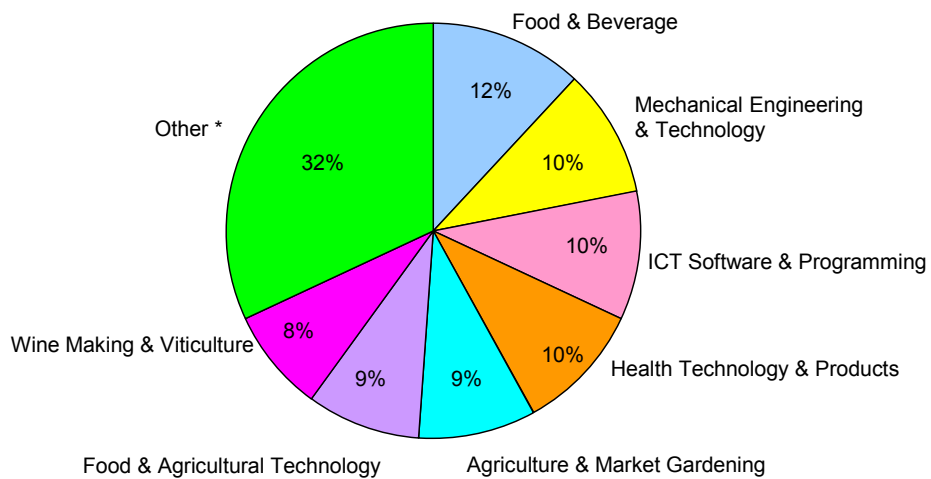
**Export Markets for Survey Respondents**



### 2.1 BUSINESS INDUSTRIES

From the total of 236 New Zealand businesses that completed the survey, the top industries (whether goods or service orientated) were represented in the following way:

**Industries Represented by Respondents in Survey**

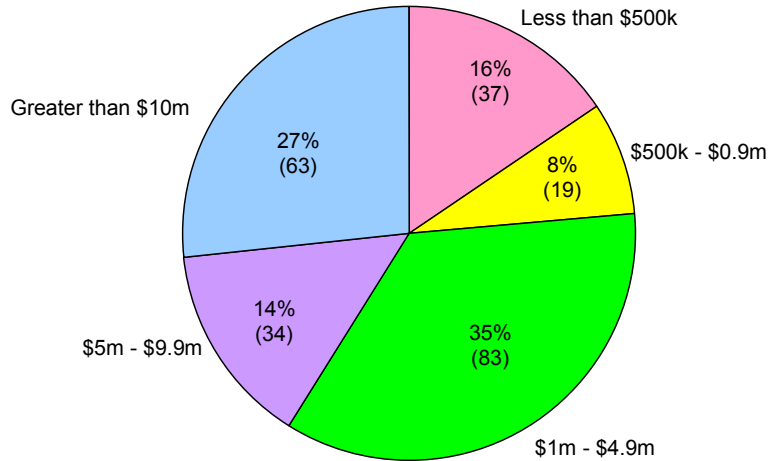


\* The "other" industries represented include metals / plastics / glass manufacturing, marine technology and products, sport and recreation, forestry, education, fashion, electrical engineering and electronics manufacturing, consultancy, wool production, publishing, civil engineering, finance management and security, mining, film and entertainment, and transport.

**2.2 ANNUAL TURNOVER & PERCENTAGE OF EXPORTS**

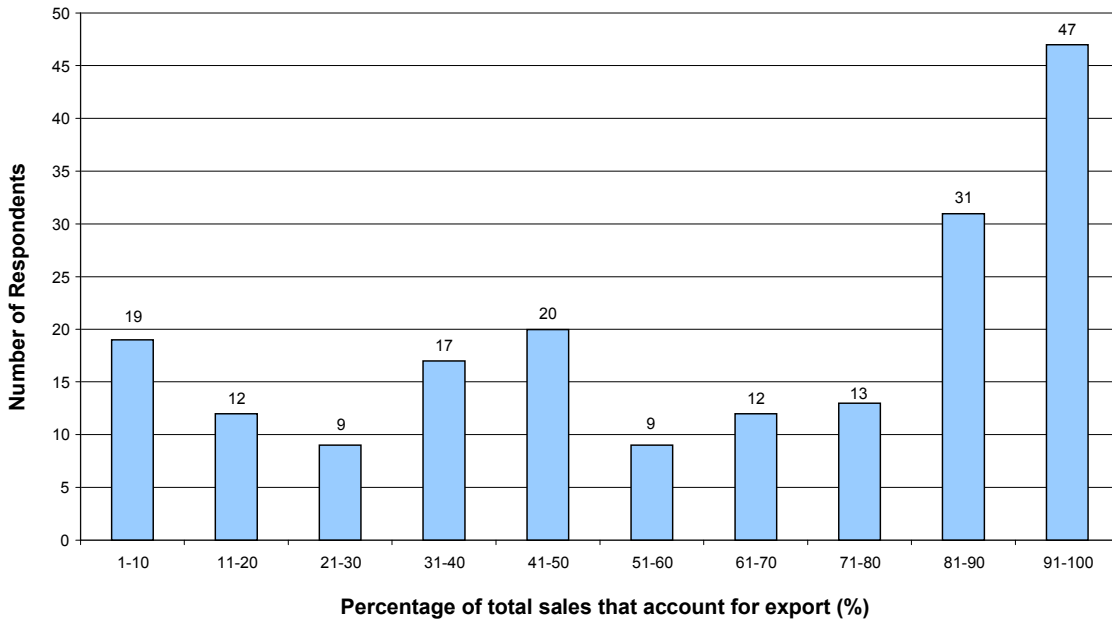
41% of respondents (97 out of 236 respondents) have an annual turnover of over five million dollars. 27% of respondents (63 out of 236 respondents) have an annual turnover greater than ten million dollars.

**Annual Turnover of Respondent Businesses**



Significantly, for nearly two thirds of respondents, exports make up 51% - 100% of their total sales. For 41% of respondents, exports make up 81% - 100% of their total sales. For 25% of respondents, exports make up 91% - 100% of their total sales.

**Total Sales that account for Export**



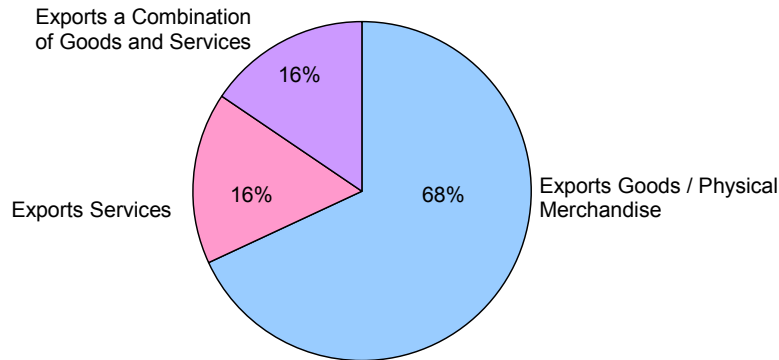
### 2.3 GOODS VS. SERVICES

The majority of respondents (84%) export goods/physical merchandise, while only 32% of respondents export services.

These results mirror official statistics, which state that services make up just 24.7% (or \$12.7 billion) of New Zealand exports (year ending March 2008).

This is despite services representing 70.1% (or \$94 billion) of New Zealand's gross domestic product.

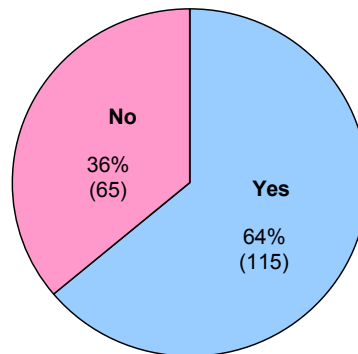
#### Proportion of Respondents that are Goods or Service Exporters



### 2.4 TARIFF GOODS

Nearly two thirds of respondents said their export goods were subject to a tariff.

#### Are Export Goods Subject to a Tariff?



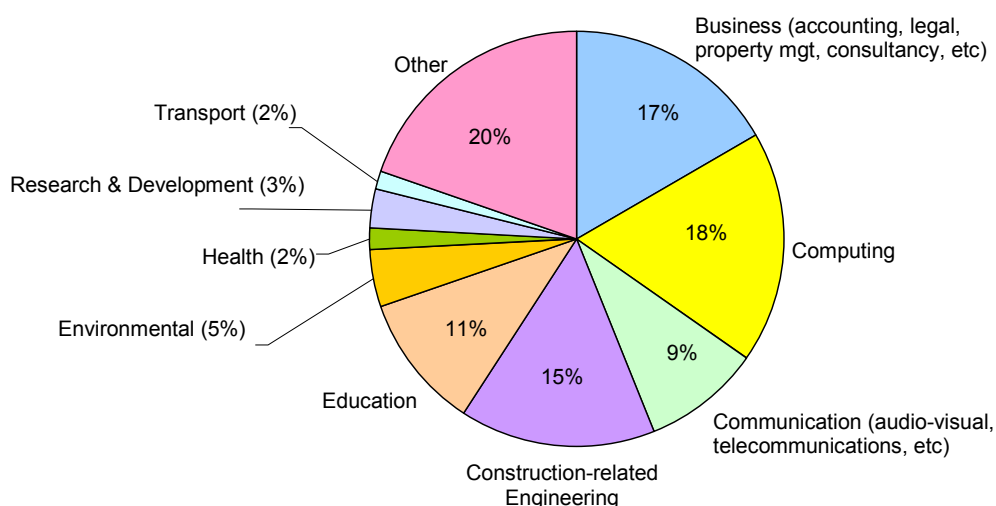
### 2.5 SERVICES

The most common service export categories identified by respondents included computing services, business services (accounting, legal, property management, consultancy, etc), and construction-related engineering services.

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### Service Export Categories Identified



There were no respondents that identified their export business as a provider of distribution services, financial services (asset management, financial advisory, underwriting and placement securities, etc), tourism and travel-related services, or recreational, cultural and sporting services.

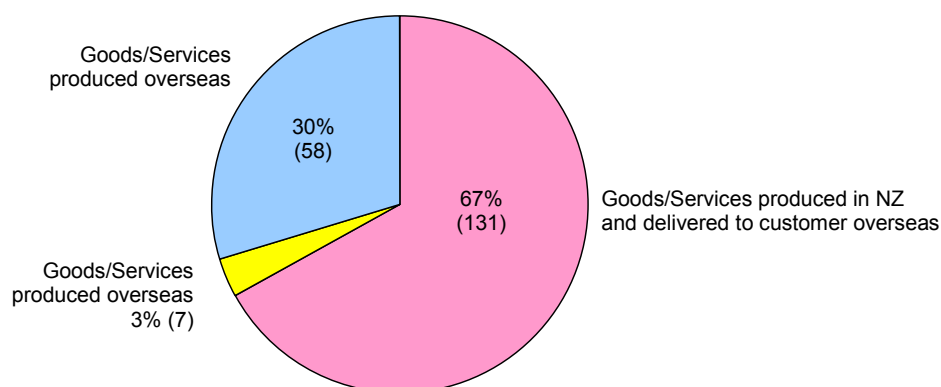
According to official statistics, New Zealand's services exports are strongly dominated by travel (56% of all services exports) and transportation (21% of all services exports), which jointly account for just under four fifths of all services exports. Other types of services make up just a small proportion of official services exports with computer and IT services accounting for 2.6%, communication services accounting for 2.5%, financial services totalling 0.9% and construction totalling 0.17%.

This survey has identified top export service categories that contrast significantly to those indicated by official statistics.

## **2.6 PRODUCING & DELIVERING**

67% of respondents stated their goods/services were produced in New Zealand before being delivered to their consumers/customers overseas. Only 3% of respondents stated their goods/services were produced overseas (i.e. via a commercial presence in another country other than New Zealand).

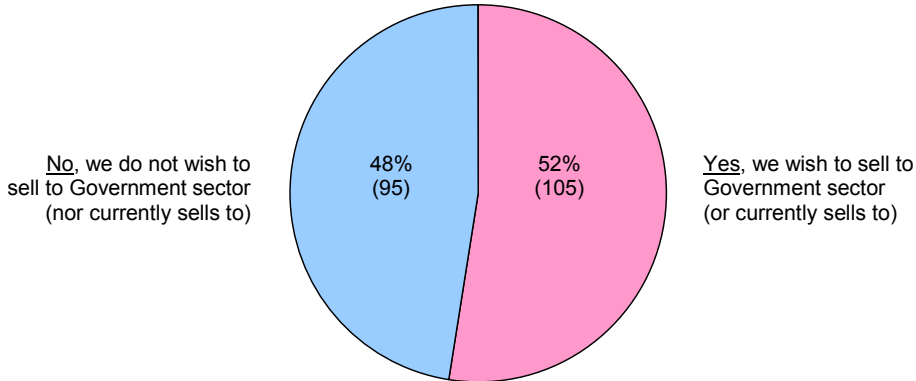
### Goods/Services Produced in NZ and Overseas



## 2.7 GOVERNMENT PROCUREMENT

On average, the government sector makes up just under a third of the respondents' customer base, while the private sector makes up over 70% of their customer base. However, over half of businesses said they wish to sell (or currently sell) to the Government sector.

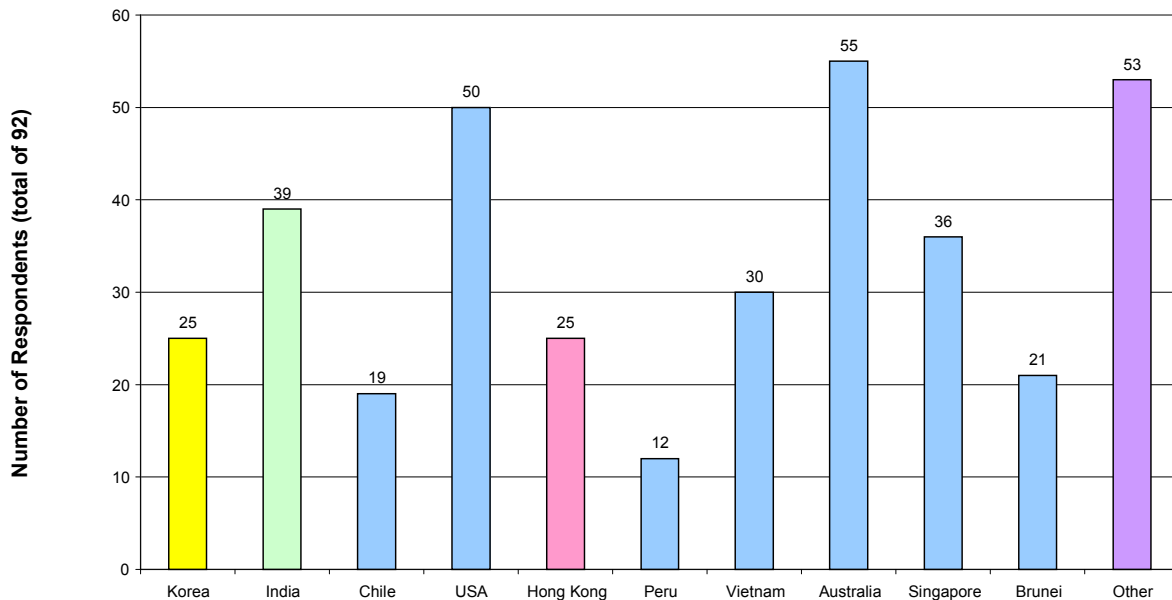
### Respondents that wish / do not wish to sell to Government Sector



Overall, of the 92 respondents that answered this survey question, 60% of respondents identified Australia (55 respondents), and 54% of respondents identified the USA (50 respondents), as the top two target markets for Government Procurement.

The third highest ranked target market for Government Procurement with 42% of respondents was India (39 respondents), closely followed by Singapore with 39% of respondents (36 respondents).

### Target Markets for Government Procurement



The most represented countries in the "Other" category include the Gulf Corporation Council (GCC) countries (Bahrain, Qatar, Oman, Saudi Arabia, Kuwait, United Arab Emirates), the EU/UK, South East Asian countries and China.

A large number of businesses identified bias toward local suppliers as a key barrier faced when accessing foreign Government Procurement markets.

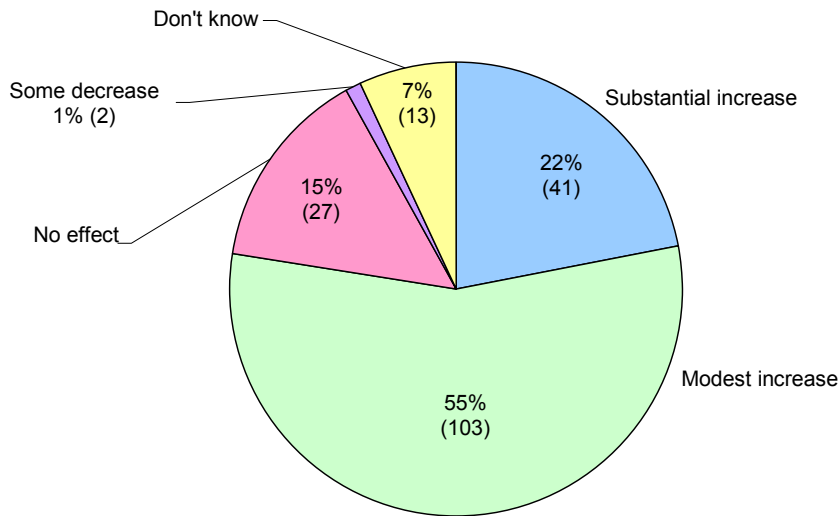
### 3 GENERAL VIEWS ON FTAs

Respondents' general views of Free Trade Agreements and the perceived impact they have on their businesses.

#### 3.1 FTAs AND PROFITABILITY

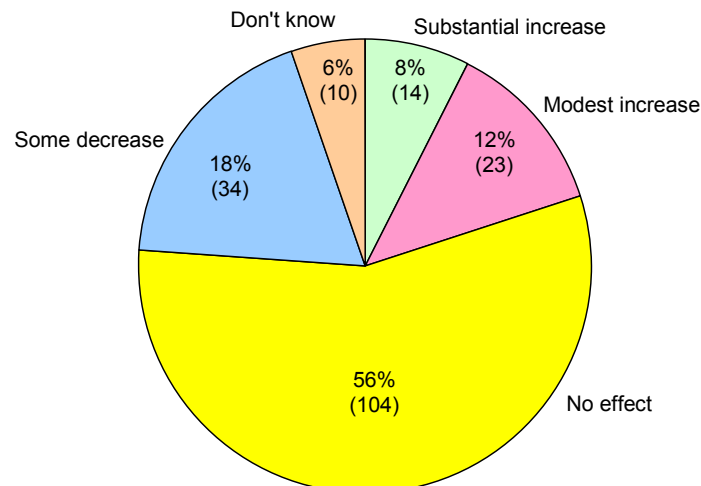
Over three quarters of respondents saw a modest to substantial increase in business profitability by removing the barriers to trade and investment in their export markets.

##### Perceived Impact of Removing Export Barriers on Business Profit



A fifth (20%) of respondents saw a modest to substantial increase in business profitability as a result of greater access to New Zealand from overseas.

##### Perceived Impact of Increasing Access to NZ on Business Profit

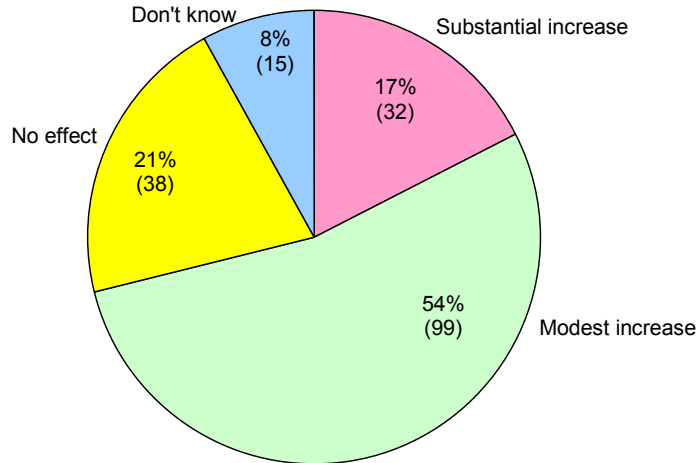


### 3.2 FTAs AND EFFICIENCY

Over 70% of respondents saw a modest to substantial increase in business efficiency (production and distribution) by removing the barriers to trade and investment in their export markets.

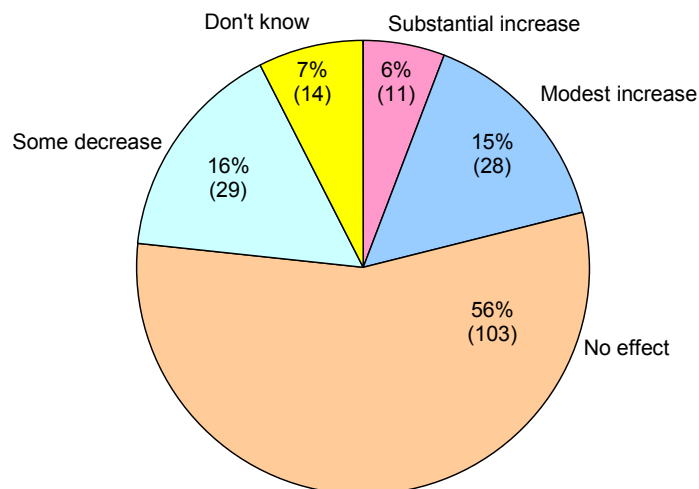
There were no respondents that identified a decrease in business efficiency by removing the barriers to trade and investment in their export markets.

**Perceived Impact of Removing Export Barriers on Business Efficiency**



A fifth (21%) of respondents saw a modest to substantial increase in business efficiency following increased access to the New Zealand market by foreign companies.

**Perceived Impact of Increasing Access to NZ on Business Efficiency**



### 3.3 IMPACTS OF FOREIGN COMPANY ACCESS

There were 132 respondents who answered the question regarding likely impacts following increased access to the New Zealand market by foreign companies. Of these respondents:

28% of respondents (37) identified the transfer of knowledge and technology as a likely impact of greater access to the New Zealand market by foreign companies.

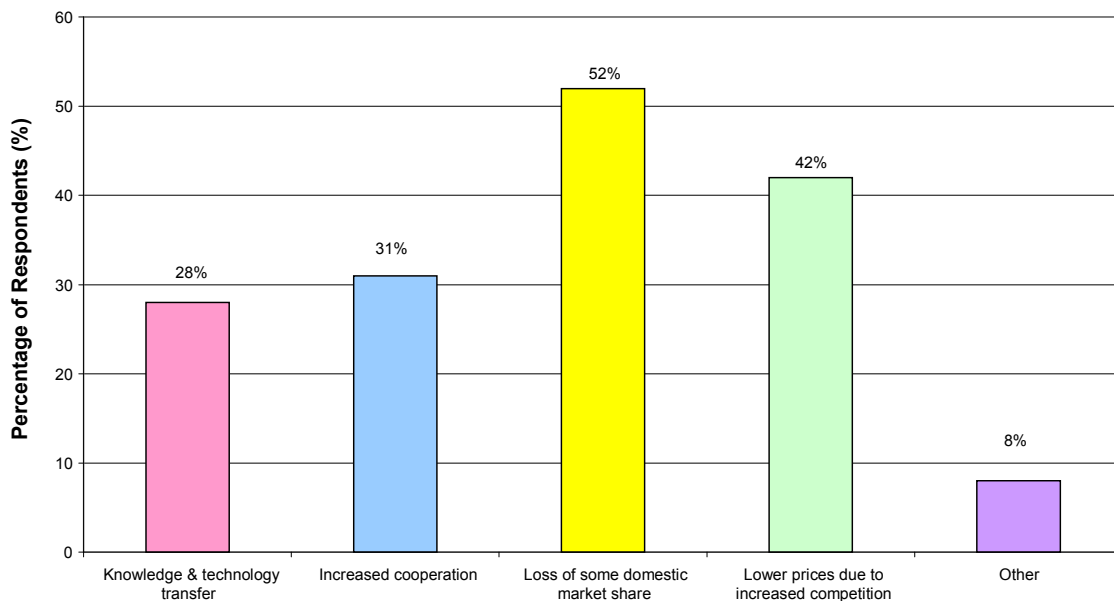
31% of respondents (41) identified increased cooperation as a likely impact of greater access to the New Zealand market by foreign companies.

52% of respondents (69) identified the loss of some domestic market share as a likely impact of greater access to the New Zealand market by foreign companies.

42% of respondents (56) identified lower prices due to increased competition as a likely impact of greater access to the New Zealand market by foreign companies.

8% of respondents (10) identified other impacts as a likely impact of greater access to the New Zealand market by foreign companies.

**Likely Impacts following Increased Access to NZ Market by Foreign Companies**



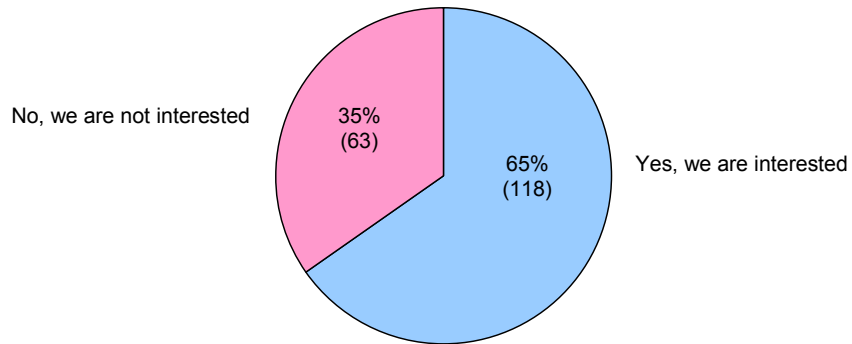
Respondents identified the following likely impacts in the “other” category:

- Reduction of domestic production for export.
- Devastation to local manufacturers.
- Overseas customers selling more volumes of their product containing their product.
- Increased competition of products already imported.
- Availability of raw materials.
- Sustainability and profitability of New Zealand.
- Boom and bust cycles caused by overseas companies not concerned with long term.
- No changes as New Zealand already offers free access.

### 3.4 INTEREST IN MFAT TRADE AGENDA

Nearly two thirds of respondents expressed interest in receiving information and updates from MFAT on developments on trade policy and Free Trade Agreements.

#### Respondents interested in receiving information & updates from MFAT



## 4 INVESTMENT

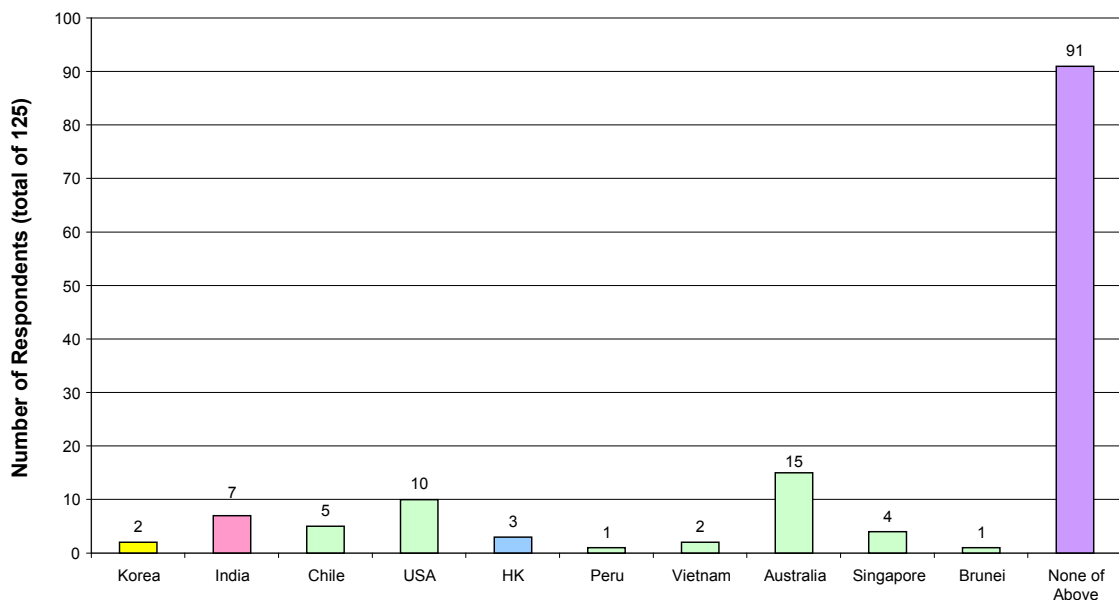
Investment by New Zealand companies in the survey is low. There were 125 responses to the question regarding the forms of investment they have (e.g. joint venture, equity share in a foreign company) in the markets of focus. Of these 125 responses:

Australia is the only country in which over 10% of respondents (15) have forms of investment (e.g. joint venture, equity share in a foreign company) other than a physical presence in the country.

The USA has 8% of respondents (10) with such investments, but the majority of businesses have very little investment in these countries.

Significantly, 73% of respondents (91) identified that they did not have such forms of investment in any of the countries listed. They identified the Gulf Corporation Council (GCC) countries (Bahrain, Qatar, Oman, Saudi Arabia, Kuwait, United Arab Emirates), China and the UK as countries in which they do have such forms of investment.

**Forms of Investment (e.g. joint venture, equity share in foreign company) in Key Markets**



### 4.1 PHYSICAL PRESENCE

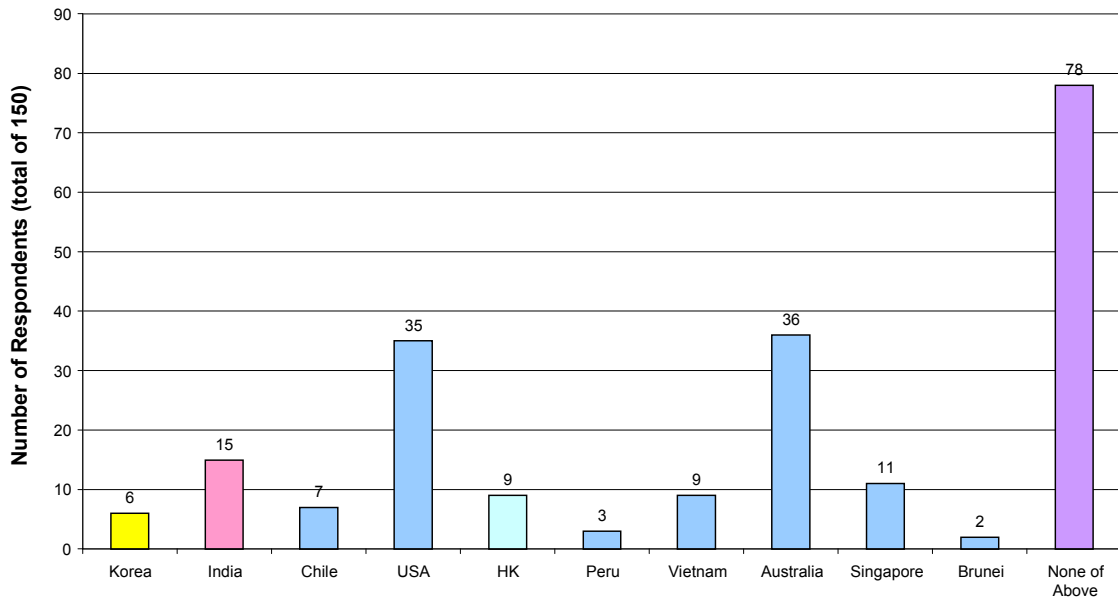
There were 150 responses to the question regarding the physical presence (i.e. office, factory) of respondents' companies in the markets of focus. Of these 150 responses:

24% of respondents (36) identified Australia as an overseas market in which they have a physical presence. This was closely followed by 23% of respondents (35) that identified the USA as an overseas market in which they have a physical presence. All other key markets had less than 10% of respondents confirming they have a physical presence in country.

Significantly, 52% of respondents (78) identified that they did not have a physical presence in any of the countries listed. They identified the UK, the wider EU region and the South East Asian nations as countries in which they do have a physical presence.

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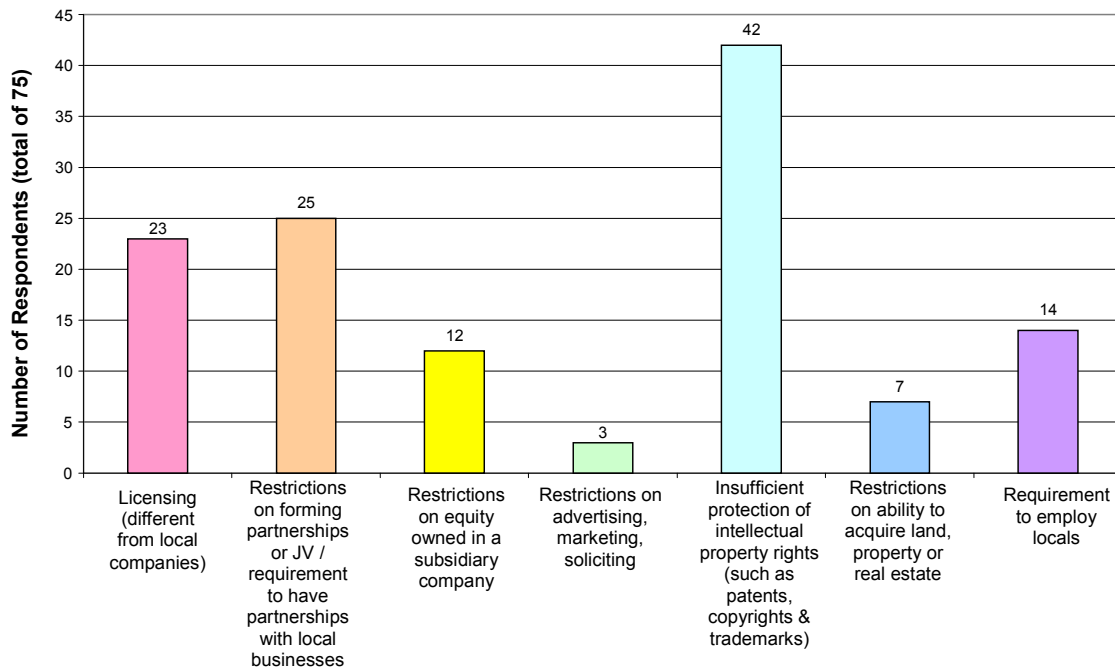
**Physical Presence (i.e. office, factory) of Respondents' Companies in Key Markets**



**4.2 INVESTMENT & TRADING**

There were 75 responses to the question regarding barriers to trade and investment in the markets of focus.

**Barriers to Trading and Investing in Key Markets**



Of these 75 responses:

56% of respondents (42) identified insufficient protection of intellectual property rights (such as patents, copyrights and trademarks) as a key barrier to trading and investing in overseas markets.

33% of respondents (25) identified restrictions on forming partnerships or joint ventures, or the requirements to have partnerships with local businesses, as a barrier to trading and investing in overseas markets.



31% of respondents (23) identified different licensing requirements from local companies, as a barrier to trading and investing in overseas markets.

19% of respondents (14) identified the requirement to employ locals as a barrier to trading and investing in overseas markets.

16% of respondents (12) identified restrictions on equity owned in a subsidiary company as a barrier to trading and investing in overseas markets.

9% of respondents (7) identified restrictions on the ability to acquire land, property or real estate, as a barrier to trading and investing in overseas markets.

4% of respondents (3) identified restrictions on advertising, marketing and soliciting as a barrier to trading and investing in overseas markets.

### 4.3 LICENSING

There were 19 responses to the question regarding the key markets in which respondents experience licensing (different from local companies) barriers. Of these 19 responses:

26% of respondents (5) identified both India and the USA as two countries in which they experience licensing barriers.

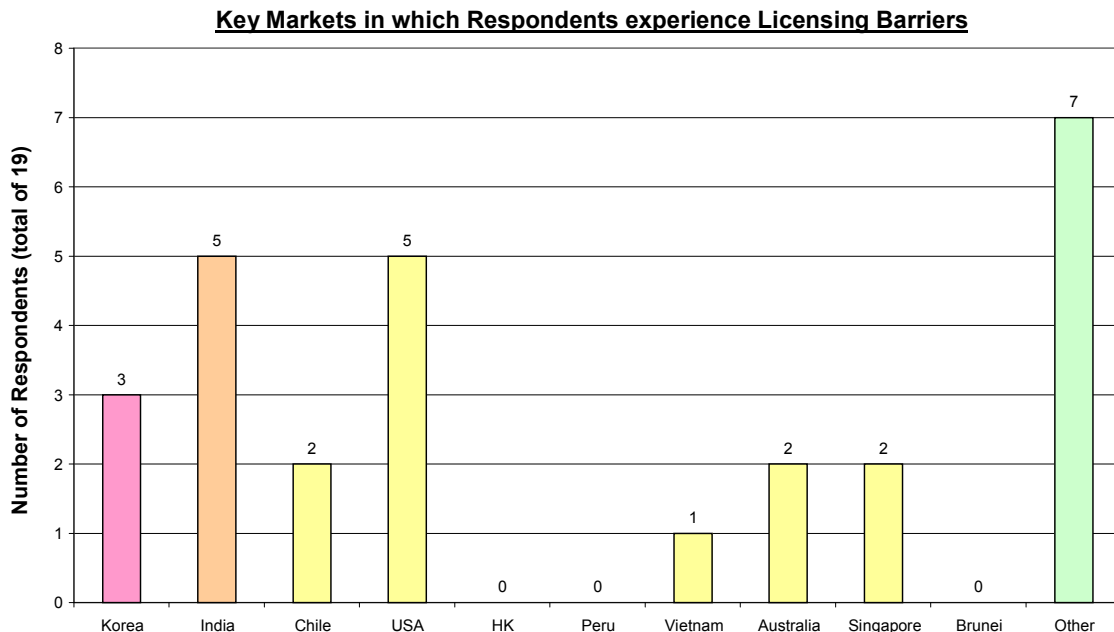
16% of respondents (3) identified Korea as a country in which they experience licensing barriers.

11% of respondents (2) identified Chile, Australia and Singapore as three countries in which they experience licensing barriers.

5% of respondents (1) identified Vietnam as a country in which they experience licensing barriers.

There were no respondents that identified Hong Kong, Peru or Brunei as countries in which they experience licensing barriers.

37% of respondents identified other overseas markets in which they face licensing barriers. These countries included China, Japan, Malaysia and the GCC states (Brunei, Kuwait, Qatar, Oman, Saudi Arabia, United Arab Emirates).



#### 4.4 PARTNERSHIPS

There were 19 responses to the question regarding the key markets in which respondents experience restrictions on forming partnerships or joint ventures, or other requirements to form partnerships with local businesses. Of these 19 responses:

21% of respondents (4) identified India as a country in which they experience restrictions on forming partnerships or joint ventures, or other requirements to form partnerships with local businesses.

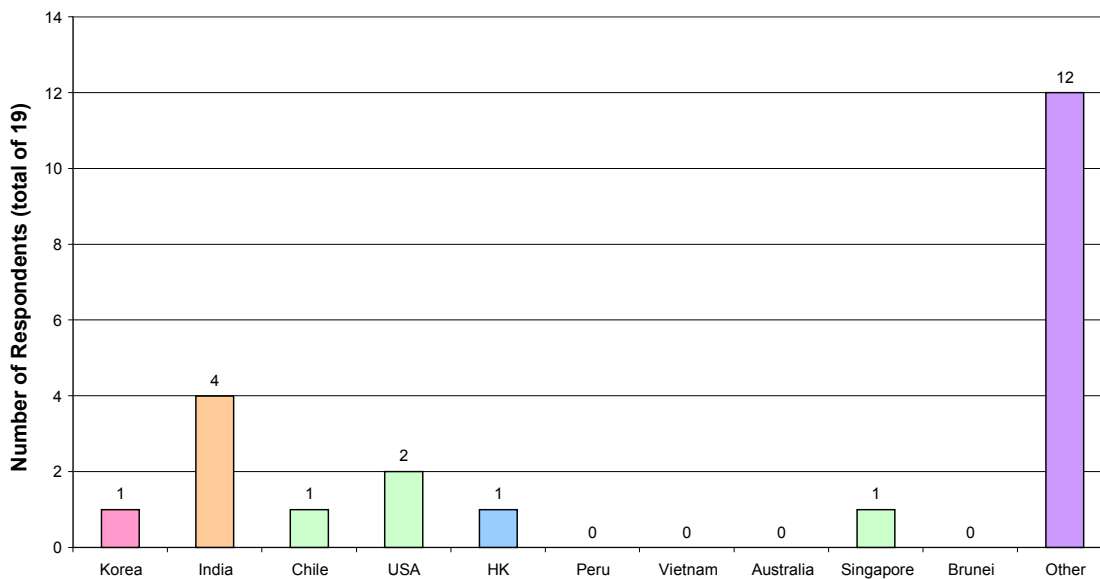
11% of respondents (2) identified the USA as a country in which they experience restrictions on forming partnerships or joint ventures, or other requirements to form partnerships with local businesses.

5% of respondents (1) identified Korea, Chile, Hong Kong and Singapore as countries in which they experience restrictions on forming partnerships or joint ventures, or other requirements to form partnerships with local businesses.

There were no respondents that identified Peru, Vietnam, Australia or Brunei as countries in which they experience restrictions on forming partnerships or joint ventures, or other requirements to form partnerships with local businesses.

63% of respondents (12) identified other overseas markets in which such barriers are experienced. These countries included China, Malaysia and the GCC states (Kuwait, Qatar, Oman, Saudi Arabia, Bahrain, United Arab Emirates).

#### Key Markets in which Respondents experience Restrictions on forming Partnerships or Joint Ventures



#### 4.5 INTELLECTUAL PROPERTY

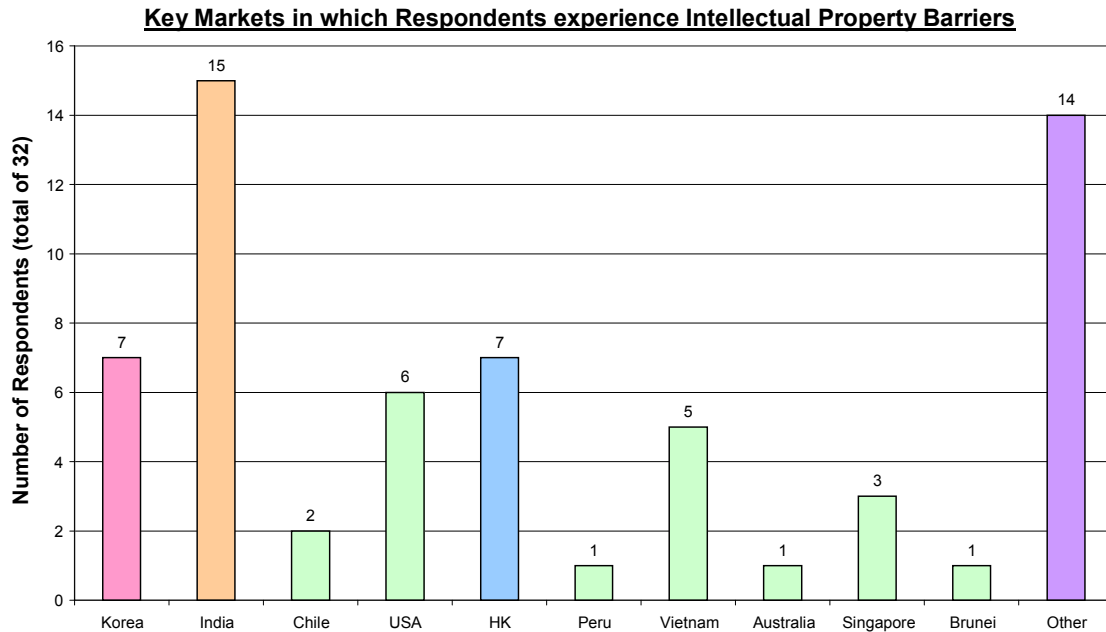
There were 32 responses to the question regarding the key markets in which respondents experience insufficient protection of intellectual property rights (such as patents, copyrights and trademarks). Of these 32 responses:

47% of respondents (15) identified India as a key overseas market in which they experience insufficient protection of intellectual property rights.

22% of respondents (7) identified Korea and Hong Kong, closely followed by 19% of respondents (6) identifying the USA, and 16% of respondents (5) identifying Vietnam, as countries in which they experience insufficient protection of intellectual property rights.

9% of respondents (3) identified Singapore, 6% of respondents (2) identified Chile, and 3% of respondents (1) identified Peru, Australia, and Brunei, as countries in which they also experience insufficient protection of intellectual property rights.

44% of respondents (14) identified other overseas markets in which such barriers are experienced. All but three of these respondents identified China as the other overseas market.



**4.6 EQUITY**

There were 8 responses to the question regarding the key markets in which respondents experience restrictions on equity that can be invested in a subsidiary company. Of these 8 responses:

38% of respondents (3) identified India as a key overseas market in which they experience restrictions on equity that can be invested in a subsidiary company.

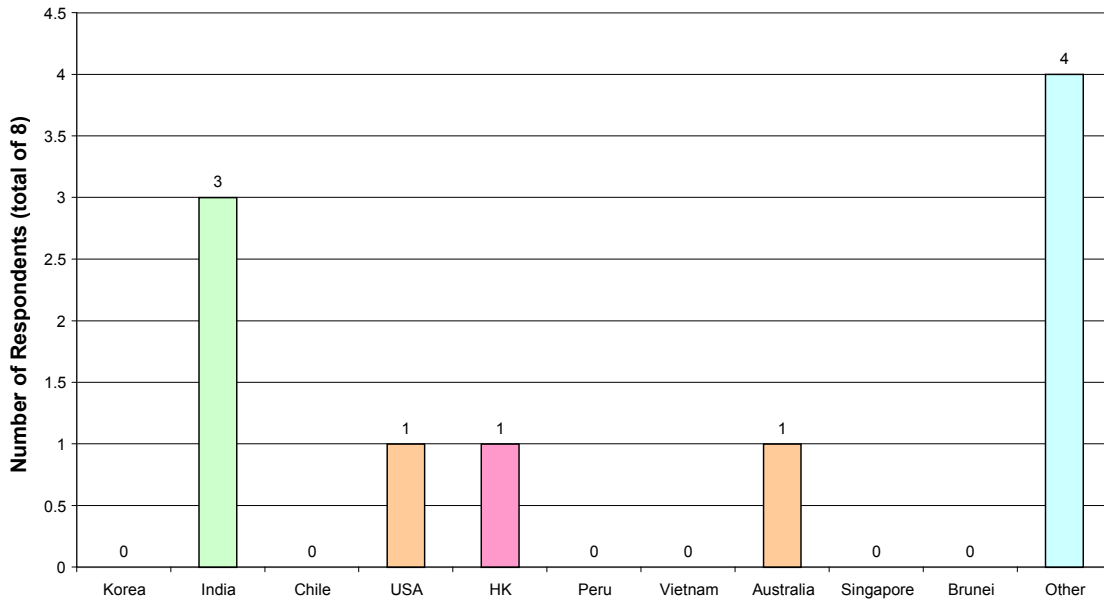
13% of respondents (1) identified the USA, Hong Kong and Australia as markets in which they experience restrictions on equity that can be invested in a subsidiary company.

There were no respondents that identified Korea, Chile, Peru, Vietnam, Singapore or Brunei as markets in which they experience restrictions on equity that can be invested in a subsidiary company.

50% of respondents (4) identified other overseas markets in which such barriers are experienced. These countries included the GCC states (in particular Oman, Saudi Arabia and the United Arab Emirates).

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**Key Markets in which Respondents experience Restrictions on Equity**



**4.7 LAND, PROPERTY & REAL ESTATE**

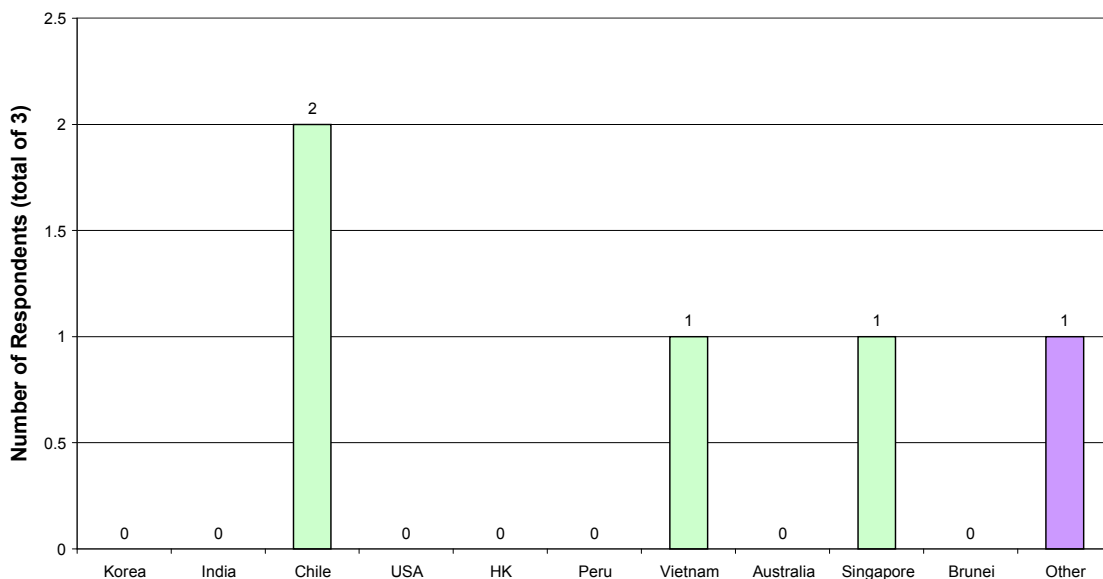
There were 3 responses to the question regarding the key markets in which respondents experience restrictions on the ability to acquire land, property or real estate. Of these 3 responses:

67% of respondents (2) identified Chile as an overseas market in which they experience restrictions on the ability to acquire land, property or real estate.

33% of respondents (1) identified Vietnam and Singapore as overseas markets in which they experience restrictions on the ability to acquire land, property or real estate.

One respondent identified Malaysia as another country in which they experience restrictions on the ability to acquire land, property or real estate.

**Key Markets in which Respondents experience Restrictions on Ability to Acquire Land, Property or Real Estate**



## 4.8 LOCAL EMPLOYEES

There were 12 responses to the question regarding the key markets in which respondents experience requirements to employ locals. Of these 12 responses:

33% of respondents (4) identified Vietnam as a key overseas market in which they experience requirements to employ locals.

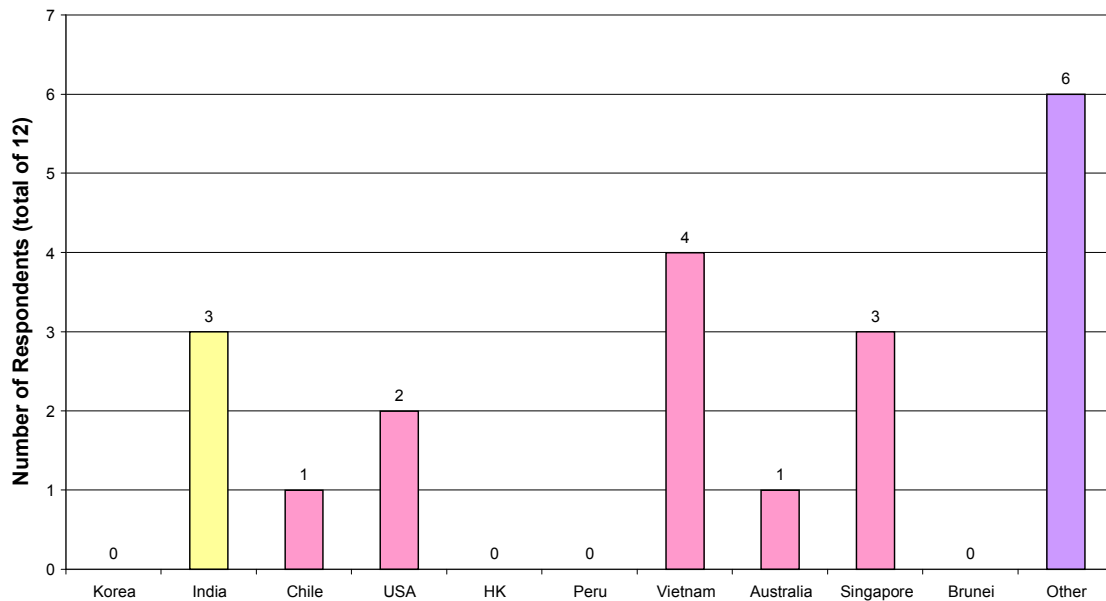
25% of respondents (3) identified India and Singapore, closely followed by 17% of respondents (2) identifying the USA, as overseas markets in which they experience requirements to employ locals.

8% of respondents (1) identified Chile, and Australia as overseas markets in which they experience requirements to employ locals.

There were no respondents that identified Korea, Hong Kong, Peru or Brunei as countries in which they experience requirements to employ locals.

50% of respondents (6) identified other countries in which they experience requirements to employ locals. These included the South East Asian countries and the GCC (Kuwait, Oman, Qatar, Bahrain, Saudi Arabia, United Arab Emirates) states.

**Key Markets in which Respondents experience Requirements to Employ Locals**



## 5 STAFF / MOVEMENT OF PEOPLE

### 5.1 LOCATION OF OVERSEAS STAFF

There were 140 responses to the question regarding the key markets in which respondents have employed staff. Of the 140 responses:

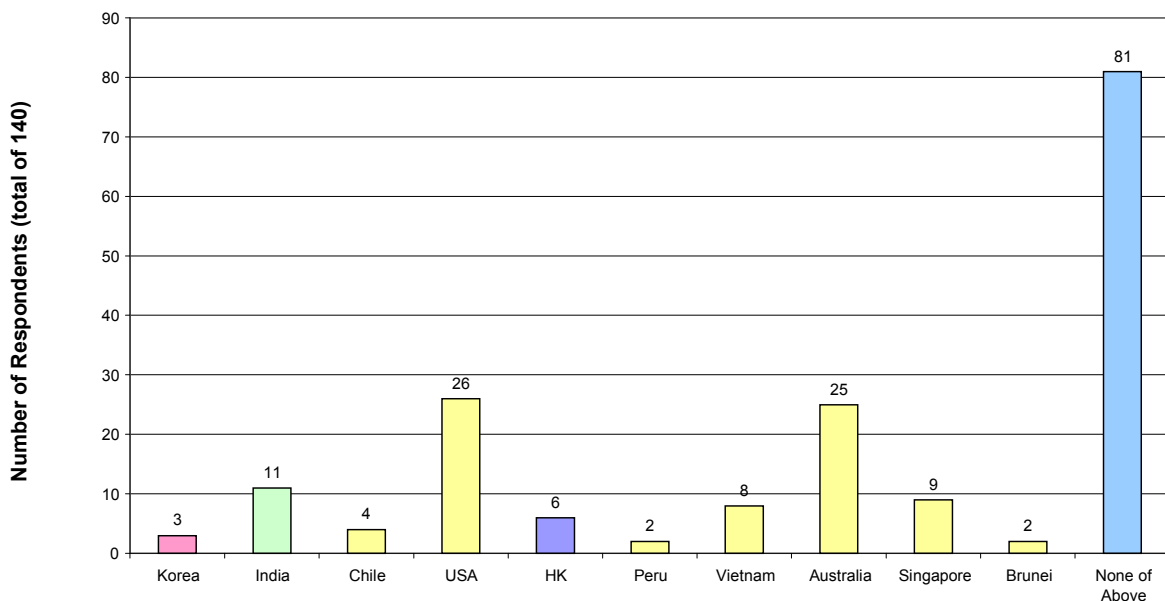
19% of respondents (26) stated they have staff employed in the USA, closely followed by 18% of respondents (25) who stated they have staff employed in Australia.

The other key markets in which respondents commonly had employed staff were India (8% of respondents), Singapore (6% of respondents), Vietnam (5.7% of respondents) and Hong Kong (4% of respondents).

There were very few respondents that identified Korea, Chile, Peru and Brunei as countries in which they have employed staff.

60% of respondents (81) stated that they did not have staff employed in any of the markets in focus. Many of these respondents identified they did have staff employed in the UK and China.

**Key Markets in which Respondents have Employed Staff**



### 5.2 NUMBER OF STAFF

The median number of staff that respondents have based in New Zealand is 13.5 employees per respondent company. The respondent company with the highest number of staff based in New Zealand has 3700 employees. The respondent company with the lowest number of staff based in New Zealand has 1 employee.

The median number of staff that respondents have based overseas is zero (0) employees per respondent company. There were 42% of respondents that do not have any employees overseas. The respondent company with the highest number of staff based overseas has 44,000 employees.

The median number of staff that respondents have that are employed overseas but are New Zealand nationals, are zero (0) employees per respondent company. There were 66% of respondents that do not have any New Zealand nationals employed overseas. The respondent company with the highest number of NZ national staff based overseas has 4200 employees.

Median # of employees in New Zealand	Median # of employees overseas	Median # of NZ nationals employed overseas
13.5	0	0

Company with highest # of employees in NZ	Company with highest # of employees overseas	Company with highest # of NZ nationals employed overseas
3,700	44,000	4,200

**5.3 NZ NATIONALS OVERSEAS: LOCATION**

There were 177 responses to the question regarding the need for any New Zealand based staff to travel overseas and work on a temporary basis in any of the markets in focus. Of these 177 responses:

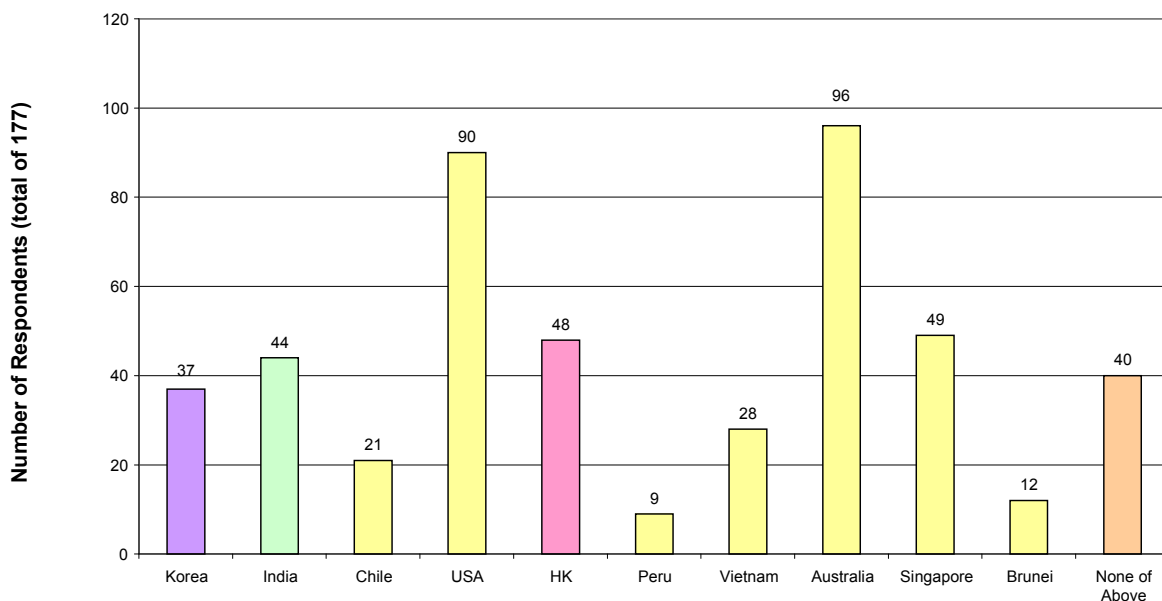
54% of respondents (96) identified they had NZ based staff that required travel to Australia in order to work on a temporary basis. This was closely followed by 51% of respondents (90) that identified they had staff required to travel in such capacity to the USA.

Other overseas markets in which many respondents identified the need to travel and work on a temporary basis, included Singapore (28% of respondents), Hong Kong (27% of respondents), India (25% of respondents), and Korea (21% of respondents).

Vietnam (16% of respondents), Chile (12% of respondents), Brunei (7% of respondents) and Peru (5% of respondents) had less significant numbers of respondents identifying them as overseas markets in which their NZ based staff required temporary employment.

23% of respondents (40) stated their NZ based staff were not required to travel and work on a temporary basis in any of the markets in focus. They other key markets they did identify for this purpose were the GCC states (Kuwait, Bahrain, Oman, Qatar, Saudi Arabia, United Arab Emirates), China, South East Asian nations, the EU, and the UK.

**NZ-based Staff required to Work on Temporary Basis in Key Markets**



#### 5.4 NZ NATIONALS OVERSEAS: WORK

There were 146 responses to the question regarding the types of work New Zealand nationals undertake overseas. Of these 146 responses:

90% of respondents (132) stated their NZ-national employees undertake selling and marketing work when overseas.

76% of respondents (111) stated their NZ-national employees do work around developing their business when overseas.

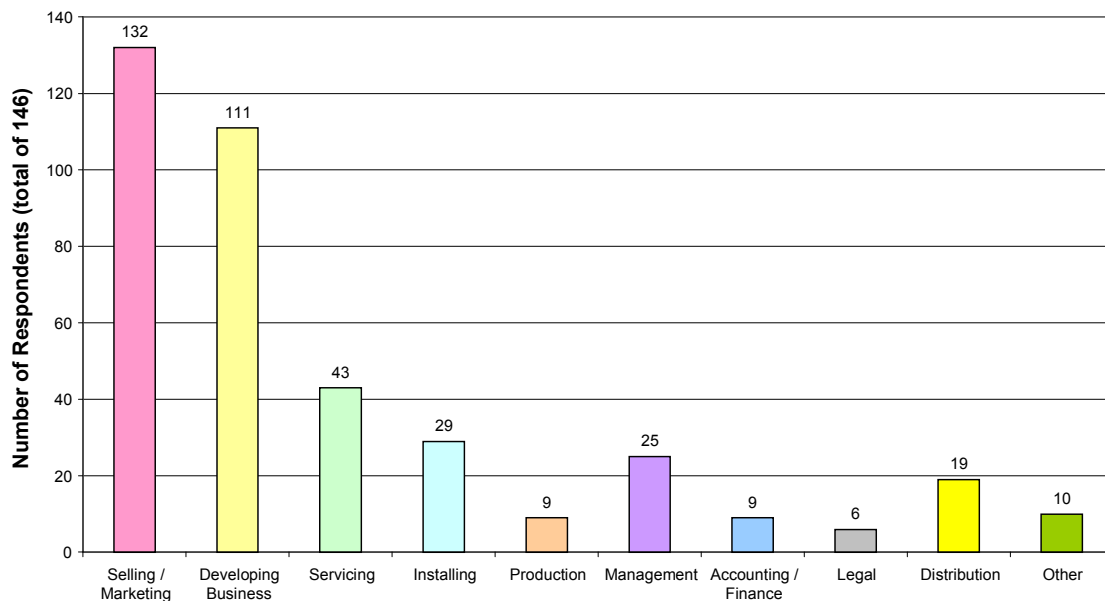
29% of respondents (43) stated their NZ-national employees do servicing work when overseas.

20% of respondents (29) stated their NZ-national employees do installing work when overseas, which is closely followed by 17% of respondents (25) who stated their NZ-national employees do work around the management of their business.

Distribution (13% of respondents), production (6% of respondents), accounting/finance (6% of respondents), and legal work (4% of respondents) were other work strands respondents identified as being done when NZ-nationals were overseas.

7% of respondents (10) stated that their NZ-national employees carried out other work overseas. These included technical consultancy and training.

**Types of Work NZ Nationals undertake Overseas**



#### 5.5 NZ NATIONALS OVERSEAS: IMPEDIMENTS

There were 51 responses to the question regarding the impediments faced by employees who are based or travel overseas. Of these 51 responses:

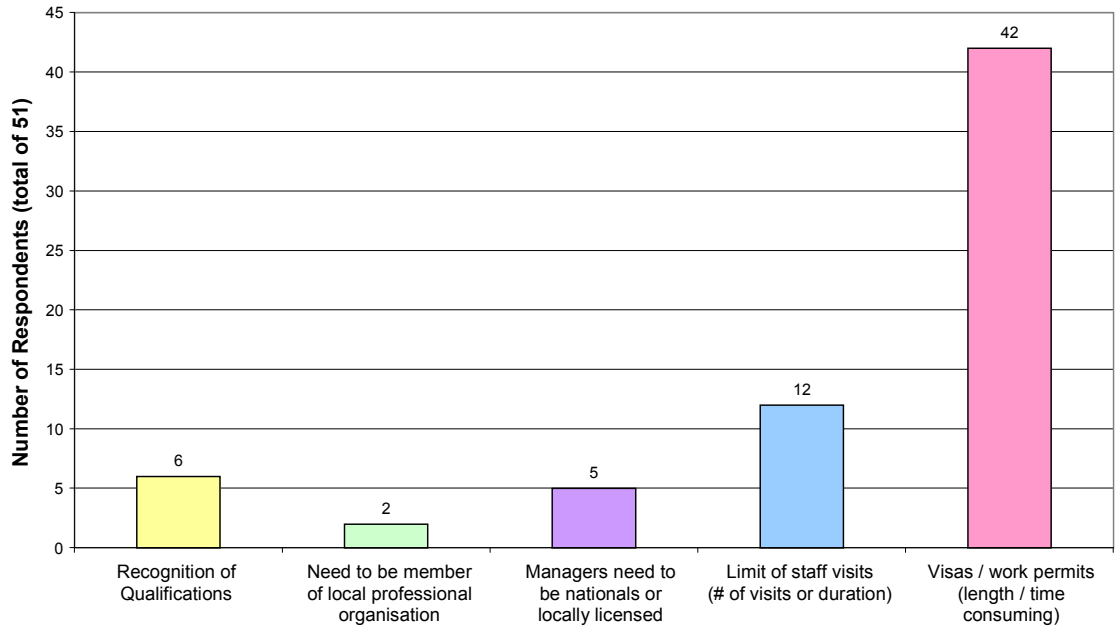
82% of respondents (42) identified the lengthiness and time consumption of obtaining visas and work permits as a key impediment faced by staff who are based or travel overseas.

24% of respondents (12) identified the limitations on staff visits (number of visits / duration of visit) as an impediment faced by staff who are based or travel overseas.



12% of respondents (6) identified issues with qualifications being recognised as an impediment faced by staff who are based or travel overseas. This was closely followed by the requirement for managers to be nationals or locally licensed (10% of respondents) and the need for membership in local professional organisations (4% of respondents).

**Impediments faced by Staff who are Based or Travel Overseas**



## **6 HONG KONG**

54% of survey respondents (128 out of 236) identified Hong Kong as a current export market.

### **6.1 GOVERNMENT PROCUREMENT**

27% of respondents (25 out of 92 responses) identified Hong Kong as a target market for Government Procurement.

### **6.2 PHYSICAL PRESENCE**

6% of respondents (9 out of 150 responses) stated they have a physical presence (i.e. office, factory) in Hong Kong.

### **6.3 INVESTMENT**

2.4% of respondents (3 out of 125 responses) stated they have forms of investment other than a physical presence (e.g. joint venture, equity share in a foreign company) in Hong Kong.

### **6.4 BARRIERS: LICENSING**

There were no respondents (from a total of 19 responses) that experienced licensing (different from local companies) barriers in Hong Kong.

### **6.5 BARRIERS: PARTNERSHIPS / JV**

5% of respondents (1 out of 19 responses) experienced restrictions on forming partnerships or joint ventures, or experienced other requirements to form partnerships with local businesses in Hong Kong.

### **6.6 BARRIERS: INTELLECTUAL PROPERTY**

22% of respondents (7 out of 32 responses) experienced insufficient protection of intellectual property rights (such as patents, copyrights and trademarks) in Hong Kong.

### **6.7 BARRIERS: EQUITY**

13% of respondents (1 out of 8 responses) experienced restrictions on equity that can be invested in a subsidiary company in Hong Kong.

### **6.8 BARRIERS: LAND, PROPERTY & REAL ESTATE**

There were no respondents (from a total of 3 responses) that experienced restrictions on the ability to acquire land, property or real estate in Hong Kong.

### **6.9 BARRIERS: EMPLOYING LOCALS**

There were no respondents (from a total of 12 responses) that experienced a requirement to employ locals in Hong Kong.

### **6.10 STAFF / MOVEMENT OF PEOPLE**

4% of respondents (6 out of 140 responses) said that they have staff employed in Hong Kong.

27% of respondents (48 out of 177 responses) said that they have New Zealand based staff who are required to travel to Hong Kong and work on a temporary basis.

**6.11 BUSINESS BARRIERS**
**Product Control Assessment and Approval**

<b>STANDARDS, TESTING &amp; CERTIFICATION REQUIREMENTS</b>	<b>FOOD SAFETY OR HEALTH REQUIREMENTS</b>	<b>NON-SCIENTIFIC BASIS TO QUARANTINE RESTRICTIONS</b>
59% of respondents (10 out of 17 responses)	41% of respondents (7 out of 17 responses)	0% of respondents (0 out of 17 responses)

**Administrative Procedures and Red Tape**

<b>CUSTOMS PROCEDURES</b>	<b>DISTRIBUTION CONSTRAINTS IN IMPORTING COUNTRIES</b>	<b>IRREGULAR 'ADDITIONAL PAYMENTS' EXPECTED TO EFFECT IMPORTS</b>	<b>CARGO HANDLING AND PORT PROCEDURES OR REQUIREMENTS</b>
36% of respondents (4 out of 11 responses)	9% of respondents (1 out of 11 responses)	27% of respondents (3 out of 11 responses)	27% of respondents (3 out of 11 responses)

**Trade Policy Issues**

<b>IMPORT QUOTAS OR IMPORT PROHIBITIONS</b>	<b>IMPORT TAXES</b>	<b>IMPORT LICENSING</b>
0% of respondents (0 out of 3 responses)	100% of respondents (3 out of 3 responses)	0% of respondents (0 out of 3 responses)

**Institutional Issues**

<b>LACK OF ADEQUATE INTELLECTUAL PROPERTY PROTECTION</b>	<b>GENERAL LACK OF LEGAL INFRASTRUCTURE</b>
86% of respondents (6 out of 7 responses)	14% of respondents (1 out of 7 responses)

**Domestic Issues**

<b>GOVERNMENT PROCUREMENT PROCEDURES</b>	<b>STATE TRADING OR STATE MONOPOLY CONTROL OF IMPORT</b>	<b>SUBSIDIES OR TAX BENEFITS GIVEN TO COMPETING DOMESTIC FIRMS</b>
33% of respondents (1 out of 3 responses)	33% of respondents (1 out of 3 responses)	0% of respondents (0 out of 3 responses)
<b>DOMESTIC PRICE CONTROLS OR ADMINISTERED PRICING</b>	<b>RESTRICTING FOREIGN EXCHANGE ALLOCATIONS TO IMPORTERS</b>	<b>HIGH INTERNAL TAXES OR CHARGES</b>
0% of respondents (0 out of 3 responses)	33% of respondents (1 out of 3 responses)	0% of respondents (0 out of 3 responses)
<b>DOMESTIC BOYCOTTS</b>	<b>ANTI-IMPORT CAMPAIGNS BY IMPORTING COUNTRY GOVERNMENTS</b>	
0% of respondents (0 out of 3 responses)	0% of respondents (0 out of 3 responses)	

## **7 INDIA**

52% of survey respondents (123 out of 236) identified India as a current export market.

### **7.1 GOVERNMENT PROCUREMENT**

42% of respondents (39 out of 92 responses) identified India as a target market for Government Procurement.

### **7.2 PHYSICAL PRESENCE**

10% of respondents (15 out of 150 responses) stated they have a physical presence (i.e. office, factory) in India.

### **7.3 INVESTMENT**

6% of respondents (7 out of 125 responses) stated they have forms of investment other than a physical presence (e.g. joint venture, equity share in a foreign company) in India.

### **7.4 BARRIERS: LICENSING**

26% of respondents (5 out of 19 responses) experienced licensing (different from local companies) barriers in India.

### **7.5 BARRIERS: PARTNERSHIPS / JV**

21% of respondents (4 out of 19 responses) experienced restrictions on forming partnerships or joint ventures, or experienced other requirements to form partnerships with local businesses in India.

### **7.6 BARRIERS: INTELLECTUAL PROPERTY**

47% of respondents (15 out of 32 responses) experienced insufficient protection of intellectual property rights (such as patents, copyrights and trademarks) in India.

### **7.7 BARRIERS: EQUITY**

38% of respondents (3 out of 8 responses) experienced restrictions on equity that can be invested in a subsidiary company in India.

### **7.8 BARRIERS: LAND, PROPERTY & REAL ESTATE**

There were no respondents (from a total of 3 responses) that experienced restrictions on the ability to acquire land, property or real estate in India.

### **7.9 BARRIERS: EMPLOYING LOCALS**

25% of respondents (3 out of 12 responses) experienced a requirement to employ locals in India.

### **7.10 STAFF / MOVEMENT OF PEOPLE**

8% of respondents (11 out of 140 responses) said that they have staff employed in India.

25% of respondents (44 out of 177 responses) said that they have New Zealand based staff who are required to travel to India and work on a temporary basis.

**7.11 BUSINESS BARRIERS**

Product Control Assessment and Approval		
STANDARDS, TESTING & CERTIFICATION REQUIREMENTS	FOOD SAFETY OR HEALTH REQUIREMENTS	NON-SCIENTIFIC BASIS TO QUARANTINE RESTRICTIONS
53% of respondents (16 out of 30 responses)	30% of respondents (9 out of 30 responses)	17% of respondents (5 out of 30 responses)

Administrative Procedures and Red Tape			
CUSTOMS PROCEDURES	DISTRIBUTION CONSTRAINTS IN IMPORTING COUNTRIES	IRREGULAR 'ADDITIONAL PAYMENTS' EXPECTED TO EFFECT IMPORTS	CARGO HANDLING AND PORT PROCEDURES OR REQUIREMENTS
37% of respondents (22 out of 59 responses)	14% of respondents (8 out of 59 responses)	27% of respondents (16 out of 59 responses)	22% of respondents (13 out of 59 responses)

Trade Policy Issues		
IMPORT QUOTAS OR IMPORT PROHIBITIONS	IMPORT TAXES	IMPORT LICENSING
11% of respondents (4 out of 37 responses)	65% of respondents (24 out of 37 responses)	24% of respondents (9 out of 37 responses)

Institutional Issues	
LACK OF ADEQUATE INTELLECTUAL PROPERTY PROTECTION	GENERAL LACK OF LEGAL INFRASTRUCTURE
79% of respondents (19 out of 24 responses)	21% of respondents (5 out of 24 responses)

Domestic Issues		
GOVERNMENT PROCUREMENT PROCEDURES	STATE TRADING OR STATE MONOPOLY CONTROL OF IMPORT	SUBSIDIES OR TAX BENEFITS GIVEN TO COMPETING DOMESTIC FIRMS
30% of respondents (15 out of 50 responses)	2% of respondents (1 out of 50 responses)	14% of respondents (7 out of 50 responses)
DOMESTIC PRICE CONTROLS OR ADMINISTERED PRICING	RESTRICTING FOREIGN EXCHANGE ALLOCATIONS TO IMPORTERS	HIGH INTERNAL TAXES OR CHARGES
4% of respondents (2 out of 50 responses)	8% of respondents (4 out of 50 responses)	30% of respondents (15 out of 50 responses)
DOMESTIC BOYCOTTS	ANTI-IMPORT CAMPAIGNS BY IMPORTING COUNTRY GOVERNMENTS	
2% of respondents (1 out of 50 responses)	10% of respondents (5 out of 50 responses)	

## **8 KOREA**

50% of survey respondents (119 out of 236) identified Korea as a current export market.

### **8.1 GOVERNMENT PROCUREMENT**

27% of respondents (25 out of 92 responses) identified Korea as a target market for Government Procurement.

### **8.2 PHYSICAL PRESENCE**

4% of respondents (6 out of 150 responses) stated they have a physical presence (i.e. office, factory) in Korea.

### **8.3 INVESTMENT**

2% of respondents (2 out of 125 responses) stated they have forms of investment other than a physical presence (e.g. joint venture, equity share in a foreign company) in Korea.

### **8.4 BARRIERS: LICENSING**

16% of respondents (3 out of 19 responses) experienced licensing (different from local companies) barriers in Korea.

### **8.5 BARRIERS: PARTNERSHIPS / JV**

5% of respondents (1 out of 19 responses) experienced restrictions on forming partnerships or joint ventures, or experienced other requirements to form partnerships with local businesses in Korea.

### **8.6 BARRIERS: INTELLECTUAL PROPERTY**

22% of respondents (7 out of 32 responses) experienced insufficient protection of intellectual property rights (such as patents, copyrights and trademarks) in Korea.

### **8.7 BARRIERS: EQUITY**

There were no respondents (from a total of 8 responses) that experienced restrictions on equity that can be invested in a subsidiary company in Korea.

### **8.8 BARRIERS: LAND, PROPERTY & REAL ESTATE**

There were no respondents (from a total of 3 responses) that experienced restrictions on the ability to acquire land, property or real estate in Korea.

### **8.9 BARRIERS: EMPLOYING LOCALS**

There were no respondents (from a total of 12 responses) that experienced a requirement to employ locals in Korea.

### **8.10 STAFF / MOVEMENT OF PEOPLE**

2% of respondents (3 out of 140 responses) said that they have staff employed in Korea.

21% of respondents (37 out of 177 responses) said that they have New Zealand based staff who are required to travel to Korea and work on a temporary basis.

## 8.11 BUSINESS BARRIERS

### Product Control Assessment and Approval

<b>STANDARDS, TESTING &amp; CERTIFICATION REQUIREMENTS</b>	<b>FOOD SAFETY OR HEALTH REQUIREMENTS</b>	<b>NON-SCIENTIFIC BASIS TO QUARANTINE RESTRICTIONS</b>
49% of respondents (22 out of 45 responses)	44% of respondents (20 out of 45 responses)	7% of respondents (3 out of 45 responses)

### Administrative Procedures and Red Tape

<b>CUSTOMS PROCEDURES</b>	<b>DISTRIBUTION CONSTRAINTS IN IMPORTING COUNTRIES</b>	<b>IRREGULAR 'ADDITIONAL PAYMENTS' EXPECTED TO EFFECT IMPORTS</b>	<b>CARGO HANDLING AND PORT PROCEDURES OR REQUIREMENTS</b>
61% of respondents (14 out of 23 responses)	13% of respondents (3 out of 23 responses)	13% of respondents (3 out of 23 responses)	13% of respondents (3 out of 23 responses)

### Trade Policy Issues

<b>IMPORT QUOTAS OR IMPORT PROHIBITIONS</b>	<b>IMPORT TAXES</b>	<b>IMPORT LICENSING</b>
30% of respondents (8 out of 27 responses)	63% of respondents (17 out of 27 responses)	7% of respondents (2 out of 27 responses)

### Institutional Issues

<b>LACK OF ADEQUATE INTELLECTUAL PROPERTY PROTECTION</b>	<b>GENERAL LACK OF LEGAL INFRASTRUCTURE</b>
83% of respondents (5 out of 6 responses)	17% of respondents (1 out of 6 responses)

### Domestic Issues

<b>GOVERNMENT PROCUREMENT PROCEDURES</b>	<b>STATE TRADING OR STATE MONOPOLY CONTROL OF IMPORT</b>	<b>SUBSIDIES OR TAX BENEFITS GIVEN TO COMPETING DOMESTIC FIRMS</b>
11% of respondents (2 out of 18 responses)	6% of respondents (1 out of 18 responses)	11% of respondents (2 out of 18 responses)
<b>DOMESTIC PRICE CONTROLS OR ADMINISTERED PRICING</b>	<b>RESTRICTING FOREIGN EXCHANGE ALLOCATIONS TO IMPORTERS</b>	<b>HIGH INTERNAL TAXES OR CHARGES</b>
6% of respondents (1 out of 18 responses)	0% of respondents (0 out of 18 responses)	33% of respondents (6 out of 18 responses)
<b>DOMESTIC BOYCOTTS</b>	<b>ANTI-IMPORT CAMPAIGNS BY IMPORTING COUNTRY GOVERNMENTS</b>	
6% of respondents (1 out of 18 responses)	28% of respondents (5 out of 18 responses)	

## **9 AUSTRALIA**

71% of survey respondents (168 out of 236) identified Australia as a current export market.

### **9.1 GOVERNMENT PROCUREMENT**

60% of respondents (55 out of 92 responses) identified Australia as a target market for Government Procurement.

### **9.2 PHYSICAL PRESENCE**

24% of respondents (36 out of 150 responses) stated they have a physical presence (i.e. office, factory) in Australia.

### **9.3 INVESTMENT**

12% of respondents (15 out of 125 responses) stated they have forms of investment other than a physical presence (e.g. joint venture, equity share in a foreign company) in Australia.

### **9.4 BARRIERS: LICENSING**

11% of respondents (2 out of 19 responses) experienced licensing (different from local companies) barriers in Australia.

### **9.5 BARRIERS: PARTNERSHIPS / JV**

There were no respondents (from a total of 19 responses) that experienced restrictions on forming partnerships or joint ventures, or experienced other requirements to form partnerships with local businesses in Australia.

### **9.6 BARRIERS: INTELLECTUAL PROPERTY**

3% of respondents (1 out of 32 responses) experienced insufficient protection of intellectual property rights (such as patents, copyrights and trademarks) in Australia.

### **9.7 BARRIERS: EQUITY**

13% of respondents (1 out of 8 responses) experienced restrictions on equity that can be invested in a subsidiary company in Australia.

### **9.8 BARRIERS: LAND, PROPERTY & REAL ESTATE**

There were no respondents (from a total of 3 responses) that experienced restrictions on the ability to acquire land, property or real estate in Australia.

### **9.9 BARRIERS: EMPLOYING LOCALS**

8% of respondents (1 out of 12 responses) experienced a requirement to employ locals in Australia.

### **9.10 STAFF / MOVEMENT OF PEOPLE**

18% of respondents (25 out of 140 responses) said that they have staff employed in Australia.

54% of respondents (96 out of 177 responses) said that they have New Zealand based staff who are required to travel to Australia and work on a temporary basis.



**9.11 BUSINESS BARRIERS**

Product Control Assessment and Approval		
STANDARDS, TESTING & CERTIFICATION REQUIREMENTS	FOOD SAFETY OR HEALTH REQUIREMENTS	NON-SCIENTIFIC BASIS TO QUARANTINE RESTRICTIONS
55% of respondents (31 out of 56 responses)	27% of respondents (15 out of 56 responses)	18% of respondents (10 out of 56 responses)

Administrative Procedures and Red Tape			
CUSTOMS PROCEDURES	DISTRIBUTION CONSTRAINTS IN IMPORTING COUNTRIES	IRREGULAR 'ADDITIONAL PAYMENTS' EXPECTED TO EFFECT IMPORTS	CARGO HANDLING AND PORT PROCEDURES OR REQUIREMENTS
35% of respondents (12 out of 34 responses)	3% of respondents (1 out of 34 responses)	12% of respondents (4 out of 34 responses)	50% of respondents (17 out of 34 responses)

Trade Policy Issues		
IMPORT QUOTAS OR IMPORT PROHIBITIONS	IMPORT TAXES	IMPORT LICENSING
50% of respondents (4 out of 8 responses)	38% of respondents (3 out of 8 responses)	13% of respondents (1 out of 8 responses)

Institutional Issues	
LACK OF ADEQUATE INTELLECTUAL PROPERTY PROTECTION	GENERAL LACK OF LEGAL INFRASTRUCTURE
50% of respondents (1 out of 2 responses)	50% of respondents (1 out of 2 responses)

## **10 BRUNEI**

44% of survey respondents (104 out of 236) identified Brunei as a current export market.

### **10.1 GOVERNMENT PROCUREMENT**

23% of respondents (21 out of 92 responses) identified Brunei as a target market for Government Procurement.

### **10.2 PHYSICAL PRESENCE**

1.3% of respondents (2 out of 150 responses) stated they have a physical presence (i.e. office, factory) in Brunei.

### **10.3 INVESTMENT**

1% of respondents (1 out of 125 responses) stated they have forms of investment other than a physical presence (e.g. joint venture, equity share in a foreign company) in Brunei.

### **10.4 BARRIERS: LICENSING**

There were no respondents (from a total of 19 responses) that experienced licensing (different from local companies) barriers in Brunei.

### **10.5 BARRIERS: PARTNERSHIPS / JV**

There were no respondents (from a total of 19 responses) that experienced restrictions on forming partnerships or joint ventures, or experienced other requirements to form partnerships with local businesses in Brunei.

### **10.6 BARRIERS: INTELLECTUAL PROPERTY**

3% of respondents (1 out of 32 responses) experienced insufficient protection of intellectual property rights (such as patents, copyrights and trademarks) in Brunei.

### **10.7 BARRIERS: EQUITY**

There were no respondents (from a total of 8 responses) that experienced restrictions on equity that can be invested in a subsidiary company in Brunei.

### **10.8 BARRIERS: LAND, PROPERTY & REAL ESTATE**

There were no respondents (from a total of 3 responses) that experienced restrictions on the ability to acquire land, property or real estate in Brunei.

### **10.9 BARRIERS: EMPLOYING LOCALS**

There were no respondents (from a total of 12 responses) that experienced a requirement to employ locals in Brunei.

### **10.10 STAFF / MOVEMENT OF PEOPLE**

1.4% of respondents (2 out of 140 responses) said that they have staff employed in Brunei.

7% of respondents (12 out of 177 responses) said that they have New Zealand based staff who are required to travel to Brunei and work on a temporary basis.

**10.11 BUSINESS BARRIERS**
**Administrative Procedures and Red Tape**

<b>CUSTOMS PROCEDURES</b>	<b>DISTRIBUTION CONSTRAINTS IN IMPORTING COUNTRIES</b>	<b>IRREGULAR 'ADDITIONAL PAYMENTS' EXPECTED TO EFFECT IMPORTS</b>	<b>CARGO HANDLING AND PORT PROCEDURES OR REQUIREMENTS</b>
33% of respondents (1 out of 3 responses)	33% of respondents (1 out of 3 responses)	0% of respondents (0 out of 3 responses)	33% of respondents (1 out of 3 responses)

**Trade Policy Issues**

<b>IMPORT QUOTAS OR IMPORT PROHIBITIONS</b>	<b>IMPORT TAXES</b>	<b>IMPORT LICENSING</b>
33% of respondents (1 out of 3 responses)	33% of respondents (1 out of 3 responses)	33% of respondents (1 out of 3 responses)

**Institutional Issues**

<b>LACK OF ADEQUATE INTELLECTUAL PROPERTY PROTECTION</b>	<b>GENERAL LACK OF LEGAL INFRASTRUCTURE</b>
50% of respondents (1 out of 2 responses)	50% of respondents (1 out of 2 responses)

**Domestic Issues**

<b>GOVERNMENT PROCUREMENT PROCEDURES</b>	<b>STATE TRADING OR STATE MONOPOLY CONTROL OF IMPORT</b>	<b>SUBSIDIES OR TAX BENEFITS GIVEN TO COMPETING DOMESTIC FIRMS</b>
40% of respondents (4 out of 10 responses)	10% of respondents (1 out of 10 responses)	10% of respondents (1 out of 10 responses)
<b>DOMESTIC PRICE CONTROLS OR ADMINISTERED PRICING</b>	<b>RESTRICTING FOREIGN EXCHANGE ALLOCATIONS TO IMPORTERS</b>	<b>HIGH INTERNAL TAXES OR CHARGES</b>
10% of respondents (1 out of 10 responses)	10% of respondents (1 out of 10 responses)	10% of respondents (1 out of 10 responses)
<b>DOMESTIC BOYCOTTS</b>	<b>ANTI-IMPORT CAMPAIGNS BY IMPORTING COUNTRY GOVERNMENTS</b>	
0% of respondents (0 out of 10 responses)	10% of respondents (1 out of 10 responses)	

## **11 CHILE**

42% of survey respondents (98 out of 236) identified Chile as a current export market.

### **11.1 GOVERNMENT PROCUREMENT**

21% of respondents (19 out of 92 responses) identified Chile as a target market for Government Procurement.

### **11.2 PHYSICAL PRESENCE**

5% of respondents (7 out of 150 responses) stated they have a physical presence (i.e. office, factory) in Chile.

### **11.3 INVESTMENT**

4% of respondents (5 out of 125 responses) stated they have forms of investment other than a physical presence (e.g. joint venture, equity share in a foreign company) in Chile.

### **11.4 BARRIERS: LICENSING**

11% of respondents (2 out of 19 responses) experienced licensing (different from local companies) barriers in Chile.

### **11.5 BARRIERS: PARTNERSHIPS / JV**

5% of respondents (1 out of 19 responses) experienced restrictions on forming partnerships or joint ventures, or experienced other requirements to form partnerships with local businesses in Chile.

### **11.6 BARRIERS: INTELLECTUAL PROPERTY**

6% of respondents (2 out of 32 responses) experienced insufficient protection of intellectual property rights (such as patents, copyrights and trademarks) in Chile.

### **11.7 BARRIERS: EQUITY**

There were no respondents (from a total of 8 responses) that experienced restrictions on equity that can be invested in a subsidiary company in Chile.

### **11.8 BARRIERS: LAND, PROPERTY & REAL ESTATE**

67% of respondents (2 out of 3 responses) experienced restrictions on the ability to acquire land, property or real estate in Chile.

### **11.9 BARRIERS: EMPLOYING LOCALS**

8% of respondents (1 out of 12 responses) experienced a requirement to employ locals in Chile.

### **11.10 STAFF / MOVEMENT OF PEOPLE**

3% of respondents (4 out of 140 responses) said that they have staff employed in Chile.

12% of respondents (21 out of 177 responses) said that they have New Zealand based staff who are required to travel to Chile and work on a temporary basis.

## 11.11 BUSINESS BARRIERS

### Product Control Assessment and Approval

<b>STANDARDS, TESTING &amp; CERTIFICATION REQUIREMENTS</b>	<b>FOOD SAFETY OR HEALTH REQUIREMENTS</b>	<b>NON-SCIENTIFIC BASIS TO QUARANTINE RESTRICTIONS</b>
73% of respondents (8 out of 11 responses)	9% of respondents (1 out of 11 responses)	18% of respondents (2 out of 11 responses)

### Administrative Procedures and Red Tape

<b>CUSTOMS PROCEDURES</b>	<b>DISTRIBUTION CONSTRAINTS IN IMPORTING COUNTRIES</b>	<b>IRREGULAR 'ADDITIONAL PAYMENTS' EXPECTED TO EFFECT IMPORTS</b>	<b>CARGO HANDLING AND PORT PROCEDURES OR REQUIREMENTS</b>
31% of respondents (5 out of 16 responses)	13% of respondents (2 out of 16 responses)	31% of respondents (5 out of 16 responses)	25% of respondents (4 out of 16 responses)

### Trade Policy Issues

<b>IMPORT QUOTAS OR IMPORT PROHIBITIONS</b>	<b>IMPORT TAXES</b>	<b>IMPORT LICENSING</b>
0% of respondents (0 out of 4 responses)	100% of respondents (4 out of 4 responses)	0% of respondents (0 out of 4 responses)

### Institutional Issues

<b>LACK OF ADEQUATE INTELLECTUAL PROPERTY PROTECTION</b>	<b>GENERAL LACK OF LEGAL INFRASTRUCTURE</b>
80% of respondents (4 out of 5 responses)	20% of respondents (1 out of 5 responses)

### Domestic Issues

<b>GOVERNMENT PROCUREMENT PROCEDURES</b>	<b>STATE TRADING OR STATE MONOPOLY CONTROL OF IMPORT</b>	<b>SUBSIDIES OR TAX BENEFITS GIVEN TO COMPETING DOMESTIC FIRMS</b>
50% of respondents (2 out of 4 responses)	0% of respondents (0 out of 4 responses)	0% of respondents (0 out of 4 responses)
<b>DOMESTIC PRICE CONTROLS OR ADMINISTERED PRICING</b>	<b>RESTRICTING FOREIGN EXCHANGE ALLOCATIONS TO IMPORTERS</b>	<b>HIGH INTERNAL TAXES OR CHARGES</b>
0% of respondents (0 out of 4 responses)	0% of respondents (0 out of 4 responses)	50% of respondents (2 out of 4 responses)
<b>DOMESTIC BOYCOTTS</b>	<b>ANTI-IMPORT CAMPAIGNS BY IMPORTING COUNTRY GOVERNMENTS</b>	
0% of respondents (0 out of 4 responses)	0% of respondents (0 out of 4 responses)	

## **12 SINGAPORE**

53% of survey respondents (125 out of 236) identified Singapore as a current export market.

### **12.1 GOVERNMENT PROCUREMENT**

39% of respondents (36 out of 92 responses) identified Singapore as a target market for Government Procurement.

### **12.2 PHYSICAL PRESENCE**

7% of respondents (11 out of 150 responses) stated they have a physical presence (i.e. office, factory) in Singapore.

### **12.3 INVESTMENT**

3% of respondents (4 out of 125 responses) stated they have forms of investment other than a physical presence (e.g. joint venture, equity share in a foreign company) in Singapore.

### **12.4 BARRIERS: LICENSING**

11% of respondents (2 out of 19 responses) experienced licensing (different from local companies) barriers in Singapore.

### **12.5 BARRIERS: PARTNERSHIPS / JV**

5% of respondents (1 out of 19 responses) experienced restrictions on forming partnerships or joint ventures, or experienced other requirements to form partnerships with local businesses in Singapore.

### **12.6 BARRIERS: INTELLECTUAL PROPERTY**

9% of respondents (3 out of 32 responses) experienced insufficient protection of intellectual property rights (such as patents, copyrights and trademarks) in Singapore.

### **12.7 BARRIERS: EQUITY**

There were no respondents (from a total of 8 responses) that experienced restrictions on equity that can be invested in a subsidiary company in Singapore.

### **12.8 BARRIERS: LAND, PROPERTY & REAL ESTATE**

There were no respondents (from a total of 3 responses) that experienced restrictions on the ability to acquire land, property or real estate in Singapore.

### **12.9 BARRIERS: EMPLOYING LOCALS**

25% of respondents (3 out of 12 responses) experienced a requirement to employ locals in Singapore.

### **12.10 STAFF / MOVEMENT OF PEOPLE**

6% of respondents (9 out of 140 responses) said that they have staff employed in Singapore.

28% of respondents (49 out of 177 responses) said that they have New Zealand based staff who are required to travel to Singapore and work on a temporary basis.

**12.11 BUSINESS BARRIERS**

Administrative Procedures and Red Tape			
CUSTOMS PROCEDURES	DISTRIBUTION CONSTRAINTS IN IMPORTING COUNTRIES	IRREGULAR 'ADDITIONAL PAYMENTS' EXPECTED TO EFFECT IMPORTS	CARGO HANDLING AND PORT PROCEDURES OR REQUIREMENTS
100% of respondents (2 out of 2 responses)	0% of respondents (0 out of 2 responses)	0% of respondents (0 out of 4 responses)	0% of respondents (0 out of 4 responses)

Trade Policy Issues		
IMPORT QUOTAS OR IMPORT PROHIBITIONS	IMPORT TAXES	IMPORT LICENSING
0% of respondents (0 out of 4 responses)	100% of respondents (4 out of 4 responses)	0% of respondents (0 out of 4 responses)

Domestic Issues		
GOVERNMENT PROCUREMENT PROCEDURES	STATE TRADING OR STATE MONOPOLY CONTROL OF IMPORT	SUBSIDIES OR TAX BENEFITS GIVEN TO COMPETING DOMESTIC FIRMS
30% of respondents (3 out of 10 responses)	10% of respondents (1 out of 10 responses)	20% of respondents (2 out of 10 responses)
DOMESTIC PRICE CONTROLS OR ADMINISTERED PRICING	RESTRICTING FOREIGN EXCHANGE ALLOCATIONS TO IMPORTERS	HIGH INTERNAL TAXES OR CHARGES
10% of respondents (1 out of 10 responses)	0% of respondents (0 out of 10 responses)	30% of respondents (3 out of 10 responses)
DOMESTIC BOYCOTTS	ANTI-IMPORT CAMPAIGNS BY IMPORTING COUNTRY GOVERNMENTS	
0% of respondents (0 out of 10 responses)	0% of respondents (0 out of 10 responses)	

## **13 PERU**

42% of survey respondents (100 out of 236) identified Peru as a current export market.

### **13.1 GOVERNMENT PROCUREMENT**

13% of respondents (12 out of 92 responses) identified Peru as a target market for Government Procurement.

### **13.2 PHYSICAL PRESENCE**

2% of respondents (3 out of 150 responses) stated they have a physical presence (i.e. office, factory) in Peru.

### **13.3 INVESTMENT**

1% of respondents (1 out of 125 responses) stated they have forms of investment other than a physical presence (e.g. joint venture, equity share in a foreign company) in Peru.

### **13.4 BARRIERS: LICENSING**

There were no respondents (from a total of 19 responses) that experienced licensing (different from local companies) barriers in Peru.

### **13.5 BARRIERS: PARTNERSHIPS / JV**

There were no respondents (from a total of 19 responses) that experienced restrictions on forming partnerships or joint ventures, or experienced other requirements to form partnerships with local businesses in Peru.

### **13.6 BARRIERS: INTELLECTUAL PROPERTY**

3% of respondents (1 out of 32 responses) experienced insufficient protection of intellectual property rights (such as patents, copyrights and trademarks) in Peru.

### **13.7 BARRIERS: EQUITY**

There were no respondents (from a total of 8 responses) that experienced restrictions on equity that can be invested in a subsidiary company in Peru.

### **13.8 BARRIERS: LAND, PROPERTY & REAL ESTATE**

There were no respondents (from a total of 3 responses) that experienced restrictions on the ability to acquire land, property or real estate in Peru.

### **13.9 BARRIERS: EMPLOYING LOCALS**

There were no respondents (from a total of 12 responses) that experienced a requirement to employ locals in Peru.

### **13.10 STAFF / MOVEMENT OF PEOPLE**

1% of respondents (2 out of 140 responses) said that they have staff employed in Peru.

5% of respondents (9 out of 177 responses) said that they have New Zealand based staff who are required to travel to Peru and work on a temporary basis.



**13.11 BUSINESS BARRIERS**
**Product Control Assessment and Approval**

<b>STANDARDS, TESTING &amp; CERTIFICATION REQUIREMENTS</b>	<b>FOOD SAFETY OR HEALTH REQUIREMENTS</b>	<b>NON-SCIENTIFIC BASIS TO QUARANTINE RESTRICTIONS</b>
100% of respondents (1 out of 1 responses)	0% of respondents (0 out of 1 responses)	0% of respondents (0 out of 1 responses)

**Administrative Procedures and Red Tape**

<b>CUSTOMS PROCEDURES</b>	<b>DISTRIBUTION CONSTRAINTS IN IMPORTING COUNTRIES</b>	<b>IRREGULAR 'ADDITIONAL PAYMENTS' EXPECTED TO EFFECT IMPORTS</b>	<b>CARGO HANDLING AND PORT PROCEDURES OR REQUIREMENTS</b>
25% of respondents (1 out of 4 responses)	25% of respondents (1 out of 4 responses)	25% of respondents (1 out of 4 responses)	25% of respondents (1 out of 4 responses)

**Trade Policy Issues**

<b>IMPORT QUOTAS OR IMPORT PROHIBITIONS</b>	<b>IMPORT TAXES</b>	<b>IMPORT LICENSING</b>
0% of respondents (0 out of 1 responses)	100% of respondents (1 out of 1 responses)	0% of respondents (0 out of 1 responses)

**Domestic Issues**

<b>GOVERNMENT PROCUREMENT PROCEDURES</b>	<b>STATE TRADING OR STATE MONOPOLY CONTROL OF IMPORT</b>	<b>SUBSIDIES OR TAX BENEFITS GIVEN TO COMPETING DOMESTIC FIRMS</b>
0% of respondents (0 out of 1 responses)	0% of respondents (0 out of 1 responses)	0% of respondents (0 out of 1 responses)
<b>DOMESTIC PRICE CONTROLS OR ADMINISTERED PRICING</b>	<b>RESTRICTING FOREIGN EXCHANGE ALLOCATIONS TO IMPORTERS</b>	<b>HIGH INTERNAL TAXES OR CHARGES</b>
0% of respondents (0 out of 1 responses)	0% of respondents (0 out of 1 responses)	100% of respondents (1 out of 1 responses)
<b>DOMESTIC BOYCOTTS</b>	<b>ANTI-IMPORT CAMPAIGNS BY IMPORTING COUNTRY GOVERNMENTS</b>	
0% of respondents (0 out of 1 responses)	0% of respondents (0 out of 1 responses)	

## **14 USA**

71% of survey respondents (167 out of 236) identified the US as a current export market.

### **14.1 GOVERNMENT PROCUREMENT**

54% of respondents (50 out of 92 responses) identified the US as a target market for Government Procurement.

### **14.2 PHYSICAL PRESENCE**

23% of respondents (35 out of 150 responses) stated they have a physical presence (i.e. office, factory) in the US.

### **14.3 INVESTMENT**

8% of respondents (10 out of 125 responses) stated they have forms of investment other than a physical presence (e.g. joint venture, equity share in a foreign company) in the US.

### **14.4 BARRIERS: LICENSING**

26% of respondents (5 out of 19 responses) experienced licensing (different from local companies) barriers in the US.

### **14.5 BARRIERS: PARTNERSHIPS / JV**

11% of respondents (2 out of 19 responses) experienced restrictions on forming partnerships or joint ventures, or experienced other requirements to form partnerships with local businesses in the US.

### **14.6 BARRIERS: INTELLECTUAL PROPERTY**

19% of respondents (6 out of 32 responses) experienced insufficient protection of intellectual property rights (such as patents, copyrights and trademarks) in the US.

### **14.7 BARRIERS: EQUITY**

13% of respondents (1 out of 8 responses) experienced restrictions on equity that can be invested in a subsidiary company in the US.

### **14.8 BARRIERS: LAND, PROPERTY & REAL ESTATE**

There were no respondents (from a total of 3 responses) that experienced restrictions on the ability to acquire land, property or real estate in the US.

### **14.9 BARRIERS: EMPLOYING LOCALS**

17% of respondents (2 out of 12 responses) experienced a requirement to employ locals in the US.

### **14.10 STAFF / MOVEMENT OF PEOPLE**

19% of respondents (26 out of 140 responses) said that they have staff employed in the US.

51% of respondents (90 out of 177 responses) said that they have New Zealand based staff who are required to travel to the US and work on a temporary basis.

**14.11 BUSINESS BARRIERS**
**Product Control Assessment and Approval**

<b>STANDARDS, TESTING &amp; CERTIFICATION REQUIREMENTS</b>	<b>FOOD SAFETY OR HEALTH REQUIREMENTS</b>	<b>NON-SCIENTIFIC BASIS TO QUARANTINE RESTRICTIONS</b>
59% of respondents (40 out of 68 responses)	37% of respondents (25 out of 68 responses)	4% of respondents (3 out of 68 responses)

**Administrative Procedures and Red Tape**

<b>CUSTOMS PROCEDURES</b>	<b>DISTRIBUTION CONSTRAINTS IN IMPORTING COUNTRIES</b>	<b>IRREGULAR 'ADDITIONAL PAYMENTS' EXPECTED TO EFFECT IMPORTS</b>	<b>CARGO HANDLING AND PORT PROCEDURES OR REQUIREMENTS</b>
46% of respondents (31 out of 67 responses)	10% of respondents (7 out of 67 responses)	12% of respondents (8 out of 67 responses)	32% of respondents (22 out of 67 responses)

**Trade Policy Issues**

<b>IMPORT QUOTAS OR IMPORT PROHIBITIONS</b>	<b>IMPORT TAXES</b>	<b>IMPORT LICENSING</b>
23% of respondents (5 out of 22 responses)	68% of respondents (15 out of 22 responses)	9% of respondents (2 out of 22 responses)

**Institutional Issues**

<b>LACK OF ADEQUATE INTELLECTUAL PROPERTY PROTECTION</b>	<b>GENERAL LACK OF LEGAL INFRASTRUCTURE</b>
100% of respondents (4 out of 4 responses)	0% of respondents (0 out of 4 responses)

**Domestic Issues**

<b>GOVERNMENT PROCUREMENT PROCEDURES</b>	<b>STATE TRADING OR STATE MONOPOLY CONTROL OF IMPORT</b>	<b>SUBSIDIES OR TAX BENEFITS GIVEN TO COMPETING DOMESTIC FIRMS</b>
28% of respondents (10 out of 37 responses)	8% of respondents (3 out of 37 responses)	19% of respondents (7 out of 37 responses)
<b>DOMESTIC PRICE CONTROLS OR ADMINISTERED PRICING</b>	<b>RESTRICTING FOREIGN EXCHANGE ALLOCATIONS TO IMPORTERS</b>	<b>HIGH INTERNAL TAXES OR CHARGES</b>
0% of respondents (0 out of 37 responses)	0% of respondents (0 out of 37 responses)	19% of respondents (7 out of 37 responses)
<b>DOMESTIC BOYCOTTS</b>	<b>ANTI-IMPORT CAMPAIGNS BY IMPORTING COUNTRY GOVERNMENTS</b>	
3% of respondents (1 out of 37 responses)	22% of respondents (8 out of 37 responses)	

## **15 VIETNAM**

45% of survey respondents (107 out of 236) identified Vietnam as a current export market.

### **15.1 GOVERNMENT PROCUREMENT**

33% of respondents (30 out of 92 responses) identified Vietnam as a target market for Government Procurement.

### **15.2 PHYSICAL PRESENCE**

6% of respondents (9 out of 150 responses) stated they have a physical presence (i.e. office, factory) in Vietnam.

### **15.3 INVESTMENT**

2% of respondents (2 out of 125 responses) stated they have forms of investment other than a physical presence (e.g. joint venture, equity share in a foreign company) in Vietnam.

### **15.4 BARRIERS: LICENSING**

5% of respondents (1 out of 19 responses) experienced licensing (different from local companies) barriers in Vietnam.

### **15.5 BARRIERS: PARTNERSHIPS / JV**

There were no respondents (from a total of 19 responses) that experienced restrictions on forming partnerships or joint ventures, or experienced other requirements to form partnerships with local businesses in Vietnam.

### **15.6 BARRIERS: INTELLECTUAL PROPERTY**

16% of respondents (5 out of 32 responses) experienced insufficient protection of intellectual property rights (such as patents, copyrights and trademarks) in Vietnam.

### **15.7 BARRIERS: EQUITY**

There were no respondents (from a total of 8 responses) that experienced restrictions on equity that can be invested in a subsidiary company in Vietnam.

### **15.8 BARRIERS: LAND, PROPERTY & REAL ESTATE**

33% of respondents (1 out of 3 responses) experienced restrictions on the ability to acquire land, property or real estate in Vietnam.

### **15.9 BARRIERS: EMPLOYING LOCALS**

33% of respondents (4 out of 12 responses) experienced a requirement to employ locals in Vietnam.

### **15.10 STAFF / MOVEMENT OF PEOPLE**

6% of respondents (8 out of 140 responses) said that they have staff employed in Vietnam.

16% of respondents (28 out of 177 responses) said that they have New Zealand based staff who are required to travel to Vietnam and work on a temporary basis.

**15.11 BUSINESS BARRIERS**
**Product Control Assessment and Approval**

<b>STANDARDS, TESTING &amp; CERTIFICATION REQUIREMENTS</b>	<b>FOOD SAFETY OR HEALTH REQUIREMENTS</b>	<b>NON-SCIENTIFIC BASIS TO QUARANTINE RESTRICTIONS</b>
67% of respondents (6 out of 9 responses)	33% of respondents (3 out of 9 responses)	0% of respondents (0 out of 9 responses)

**Administrative Procedures and Red Tape**

<b>CUSTOMS PROCEDURES</b>	<b>DISTRIBUTION CONSTRAINTS IN IMPORTING COUNTRIES</b>	<b>IRREGULAR 'ADDITIONAL PAYMENTS' EXPECTED TO EFFECT IMPORTS</b>	<b>CARGO HANDLING AND PORT PROCEDURES OR REQUIREMENTS</b>
58% of respondents (7 out of 12 responses)	8% of respondents (1 out of 12 responses)	25% of respondents (3 out of 12 responses)	8% of respondents (1 out of 12 responses)

**Trade Policy Issues**

<b>IMPORT QUOTAS OR IMPORT PROHIBITIONS</b>	<b>IMPORT TAXES</b>	<b>IMPORT LICENSING</b>
0% of respondents (0 out of 5 responses)	100% of respondents (5 out of 5 responses)	0% of respondents (0 out of 5 responses)

**Institutional Issues**

<b>LACK OF ADEQUATE INTELLECTUAL PROPERTY PROTECTION</b>	<b>GENERAL LACK OF LEGAL INFRASTRUCTURE</b>
69% of respondents (9 out of 13 responses)	31% of respondents (4 out of 13 responses)

**Domestic Issues**

<b>GOVERNMENT PROCUREMENT PROCEDURES</b>	<b>STATE TRADING OR STATE MONOPOLY CONTROL OF IMPORT</b>	<b>SUBSIDIES OR TAX BENEFITS GIVEN TO COMPETING DOMESTIC FIRMS</b>
60% of respondents (6 out of 10 responses)	0% of respondents (0 out of 10 responses)	0% of respondents (0 out of 10 responses)
<b>DOMESTIC PRICE CONTROLS OR ADMINISTERED PRICING</b>	<b>RESTRICTING FOREIGN EXCHANGE ALLOCATIONS TO IMPORTERS</b>	<b>HIGH INTERNAL TAXES OR CHARGES</b>
0% of respondents (0 out of 10 responses)	10% of respondents (1 out of 10 responses)	30% of respondents (3 out of 10 responses)
<b>DOMESTIC BOYCOTTS</b>	<b>ANTI-IMPORT CAMPAIGNS BY IMPORTING COUNTRY GOVERNMENTS</b>	
0% of respondents (0 out of 10 responses)	0% of respondents (0 out of 10 responses)	