

Edition • 2013

A GUIDE TO

# EFFECTIVE LOBBYING IN EUROPE

The View of Policy-Makers

<http://lobbyingsurvey.eu>



Burson Marsteller

Burson-Marsteller would like to thank nearly 600 respondents who have made this Guide to Effective Lobbying in Europe possible. We would also like to thank Penn, Schoen and Berland (PSB), who carried out the interviews in the 20 countries surveyed, and our partners below for their support. A special thanks to European Commission Vice-President Maroš Šefčovič for agreeing to write the foreword to this report.



Reproduction of the data contained in this report is authorised provided attribution is given to Burson-Marsteller

# TABLE OF CONTENTS

## FOREWORD

*by Maroš Šefčovič, Vice-President of the European Commission responsible for Inter-Institutional Relations and Administration*

2

## INTRODUCTION

*by Jeremy Galbraith, CEO Burson-Marsteller Europe, Middle East & Africa*

3

## BACKGROUND AND METHODOLOGY

5

## EXECUTIVE SUMMARY

6

## 12 TIPS FOR EFFECTIVE LOBBYING

7

## PERCEPTIONS OF LOBBYING

8

## LOBBYING EFFECTIVENESS

14

## POOR PRACTICE

16

## CHANNELS OF INFLUENCE

18

## COUNTRY INSIGHTS

22

## ANNEX: RAW DATA

62

# FOREWORD



**by Maroš Šefčovič**

*Vice-President of the European Commission  
in charge of inter-institutional relations  
and administration*

Over recent years, the influence of lobbying has become an increasingly important issue at EU level and in many EU member states. So it is appropriate for those who lobby and those who are lobbied to reflect upon the purposes of lobbying and what makes lobbying useful or harmful, good or bad, effective or ineffective. This survey by Burson-Marsteller provides food for thought for everyone.

Lobbying is seen by many respondents as ensuring the participation of social and economic actors and citizens in the political process. Indeed, the possibilities for citizens or organisations to participate in the political process are often more effectively used through specific lobbying or campaigning activities.

Transparency is key in this regard, and the results of the survey underline it. It is crucial to know who someone represents and what their interests and motivations are. The answers to the survey reflect the awareness that the loudest voice does not necessarily represent the majority and that there are always other views to be taken into account. As long as everyone is aware of this, lobbying

is a useful and even necessary part of an open, democratic process.

In addition to transparency and awareness, there is a need for ethical and professional behaviour in the political process. For a decision-maker, there is nothing worse than being lobbied by someone who doesn't know the process, who tries to replace facts and arguments by aggressive statements, biased information or, in the worst case, unethical and even illegal behaviour. I welcome the efforts of the public affairs community to share best practice and establish standards for professional and ethical behaviour at EU level – just as the EU has ethical rules in place for its staff to protect the integrity of the institutions.

The joint European Commission and European Parliament Transparency Register, established in 2011, brought both institutions into new territory: a register that offers citizens information about all those who try to influence the EU decision-making process and asks for their commitment to comply with a code of conduct. 5,600 organisations have registered so far. This is a strong signal of their willingness to be transparent.

Many respondents think mandatory registers would be useful in their country, although results vary between countries. The survey also shows different understandings of what constitutes a 'lobbyist'. Given the diversity of organisations, structures and perceptions across Europe, the EU Register was deliberately designed as voluntary and not limited to 'lobbying' and a specific definition.

The Register will be reviewed this year and discussions across Europe about lobbying, transparency and regulation will continue. This report provides very interesting and useful reading against this background.



**by Jeremy Galbraith**

*CEO Burson-Marsteller Europe,  
Middle East & Africa*

Like its predecessors, this fifth Burson-Marsteller Guide to Effective Lobbying in Europe aims to contribute to a better understanding of what makes good lobbying.

Based on analysis by Penn, Schoen & Berland (PSB), and with the support of our network of offices and partners across Europe, this report seeks to document perceptions, opinions and the evolution in the way that government stakeholders perceive lobbying – what works, and what doesn't.

Twelve years ago Burson-Marsteller published its first survey of stakeholder perceptions and opinions, focusing on the European Parliament. A similar survey on the European Commission followed in 2003. In 2005, we looked at both institutions, as well as the Council of the European Union.

In 2009 we took our first look at lobbying in European capitals, covering thirteen EU member states and Norway, as well as Brussels. This Guide is bigger still, covering another five EU member states. Seven of the eight central and Eastern European countries that joined the Union in 2004 are covered in this survey.

The 2013 survey reinforces many of the previous findings, including strong support for transparency among regulators and politicians.

Respondents voiced massive support for a mandatory register of lobbyists, notably in Brussels, where 90% of respondents backed compulsory registration. Europe-wide, three-quarters of respondents agreed. It is also interesting to note the growth of transparency in the internal culture of public bodies: 89% of EU-level decision-makers report any meeting with lobbyists to their hierarchy; the average across Europe is just below one in two.

These specific findings reinforce Burson-Marsteller's belief that transparency and ethical behaviour are indispensable. We see them as vital to maintain our credibility and that of our clients. Our global Code of Values requires all employees to declare their client interest, and we were the first major public affairs agency to register on the EU register.

We also support mandatory registration. Our trade association, the European Public Affairs Consultancies Association (EPACA), has led calls for the EU institutions to refuse to work with unregistered industry representatives.

The results also show that NGOs continue to outperform both corporations and public affairs agencies, with trade and professional associations topping the rankings for effectiveness. These findings provide considerable food for thought as our profession strives to create a best practice model for lobbying.

We will certainly use the data to inform and improve our work – and we hope you will too.

We hope you find this survey useful and welcome your feedback or comments.



# — BACKGROUND & METHODOLOGY —

This fifth Burson-Marsteller lobbying survey is designed to increase knowledge about lobbying and improve both understanding of lobbying and greater transparency in its conduct. This edition covers an additional five countries compared with the previous survey, conducted in 2009. Decision-makers in nineteen countries were asked for their views on lobbying, as were decision-makers at EU level.

The interviews involved a basic series of 22 questions to gather qualitative, 'directional' data about perceptions of lobbying and lobbyists. The interviews were conducted either online or by telephone. Interviewees included politicians (both Members of national Parliaments (MPs) and Members of the European Parliament (MEPs)) and senior officials from national governments and the European institutions. In total, nearly 600 interviews were conducted.

## Interviews were done in each of the following countries:

- Brussels: EU institutions
- Czech Republic
- Denmark
- Estonia
- Finland
- France
- Germany
- Greece
- Hungary
- Italy
- Latvia
- Lithuania
- The Netherlands
- Norway
- Poland
- Portugal
- Romania
- Spain
- Sweden
- United Kingdom

# EXECUTIVE SUMMARY

Transparency is a key concern for respondents to the survey. More than 26% of respondents said that a lack of transparency was the most negative aspect of lobbying – the highest single response. Giving undue influence to elites and the wealthy (24%) and not providing neutral information (23%) followed close behind.

However, 89% of respondents either agreed or strongly agreed with the statement that ‘ethical and transparent lobbying helps policy development’ and most groups of lobbyists were generally perceived as being transparent, most notably trade associations, professional organisations, companies, trade unions and NGOs. These five groups were among those most commonly perceived as lobbyists; the other group generally thought of as lobbyists - public affairs agencies - were seen as less transparent.

37% of respondents saw the most positive aspect of lobbying as being its ability to ensure participation of social and economic actors and citizens in the political process. ‘Providing useful and timely information’ was cited by 28% of respondents and ‘raising the local or national importance of an issue’ by 20%, although this rose to around 50% in Finland and the UK.

Most respondents thought that lobbying was not sufficiently regulated, while opinion was evenly divided on whether increased regulation would come in the next three years. More than half of the respondents thought that a mandatory register for lobbyists would be useful in their country, with less than a quarter disagreeing.

Trade associations were perceived as the most effective lobbyists, followed by professional organisations and NGOs. There were, however, significant variations between countries: for example, in Germany NGOs and public affairs agencies were seen to be most effective.

‘Corporate’ lobbyists (from companies, trade associations and other profit-making entities) were most effective in the energy and healthcare sectors. NGOs fared better on environment and human rights issues, and on social affairs. Retail and consumer goods lobbyists were perceived to be particularly ineffective.

Differences between the ‘corporate’ and NGO sectors were also evident when policy-makers were asked about poor lobbying practice. ‘Corporate lobbyists’ were most likely to lack transparency, whereas NGOs were most likely to base their positions on emotions rather than facts. Both groups were criticised by around a third of respondents for failing to understand processes and procedures, for being too aggressive, or for arriving too early or too late in the process.

Internal meetings, national authorities’ documents, meetings with industry and written briefing materials were perceived as the most useful types of information to make an informed decision. Specialist news, government websites, scientific websites and traditional media websites were the most helpful online media sources. Social media were generally perceived to be unhelpful and were not frequently consulted. The websites of industry associations, companies and NGOs tend to be visited at least once a week by around 40% of respondents.

# 12 TIPS FOR EFFECTIVE LOBBYING

## **Be transparent about your interests:**

Policy-makers see a lack of transparency as a poor lobbying practice and for one in two respondents to the survey transparency was a factor in deciding whether to speak to a lobbyist.

## **Be aware that your audience is not only 'in the room':**

Policy-makers are increasingly reporting to their colleagues and the public on who they meet and on what issue – so act transparently.

## **Get your timing right:**

Get in early – but not too early – and follow the issue through all stages of policy development. Entering the debate too late is considered by many policy-makers to be poor practice.

## **Understand the legislative process and its technicalities:**

Avoid a common criticism of both 'corporate' and NGO lobbyists by knowing what a decision-maker is able to do, when, and according to what procedure.

## **Think politically:**

Identify the focus of political argument, the values and interests involved and the potential basis for consensus. You will not always get 100% of what you want, but the compromise-builders are often successful.

## **Back up political arguments with evidence:**

Independent reports and science help to convince policy-makers – those surveyed criticised lobbying based on emotion rather than facts.

## **Identify your ultimate audience and clearly set realistic objectives at the beginning of your campaign:**

Be prepared to adapt your strategy in response to both external and internal changes.

## **Know the wide range of people that you need to talk to, but target the right decision-makers at the right time:**

Policy-makers are more likely to meet you if the topic is in their field of expertise or is of interest to them.

## **Mobilise people to act:**

Search for allies and work within coalitions whenever possible. Different policy-makers value the input of different groups of lobbyists, so working together in partnerships and even temporary coalitions can bear fruit.

## **Ensure that your message gets through online:**

While digital sources are less influential than meetings and briefings, policy-makers do frequently look at the websites of companies, industry associations and NGOs – check that you are giving the right first impression.

## **Recognise Europe's diversity:**

Keep in mind the local, national and European dimensions of a policy issue and leverage the differences in attitudes between policy-makers in different countries.

## **Be creative and memorable from start to finish:**

Briefing materials, events and other activities that draw attention to your messages help lead to success.

# PERCEPTIONS OF LOBBYING

## WHO ARE LOBBYISTS?

When asked which groups match the definition of a 'lobbyist', two-thirds of respondents named trade associations, with public affairs agencies (58%) and professional organisations (57%) being other common responses. Non-governmental organisations (NGOs) were named as lobbyists by more than half of the respondents (51%), but companies by less than half (47%). Trade unions were deemed to be lobbyists by only 40% of respondents.

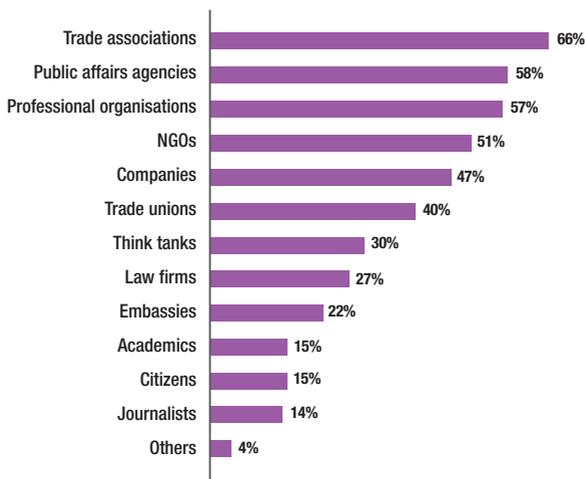
Looking at national variations, trade associations were deemed to be lobbyists by more than 90% of respondents in Estonia (100%), Finland (97%), the Netherlands (94%) and Latvia (93%).

Public affairs agencies are most strongly perceived as 'lobbyists' in France (93%) the Netherlands (89%), Estonia (87%) and the UK (87%).

NGOs were much more frequently considered lobbyists in Estonia (100%), Finland (93%), Latvia (80%) and the Netherlands (78%). Indeed, in these countries there appeared to be a general willingness to define a wide range of groups as 'lobbyists'.

73% of EU-level respondents also identified trade unions as lobbyists – far higher than the Europe-wide average for this category.

In your experience which of the following could be considered as matching the description of a 'lobbyist?'



## WHAT ARE THE POSITIVE ASPECTS OF LOBBYING?

The survey suggests that there is no overwhelming agreement across Europe on the most positive aspect of lobbying. However, the capacity of lobbying to ensure the participation of social and economic actors and citizens in the political process emerged as the leading response (37%).

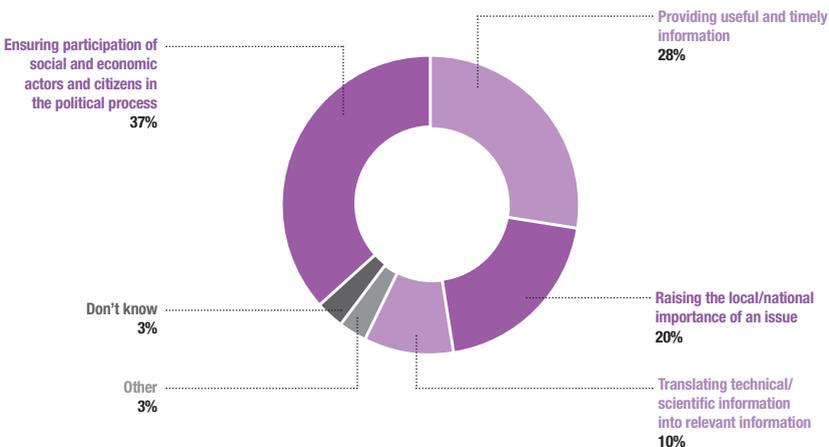
The second most positive aspect of lobbying, according to the survey, is its ability to provide useful and timely information (28%). Respondents in the Netherlands (61%), Norway (55%) and Sweden (50%) saw this as by far the most important positive aspect – and

it was also the top response in the Czech Republic, Denmark and Germany.

Italy (30%) and Poland (33%) and Greece (23%) are the only countries where more than one in five respondents emphasised the positive role lobbying can play in translating scientific information into relevant information.

Raising the local or national importance of an issue seems to be a less positive aspect than in previous surveys – only 20% of respondents in 2013 said it was the most positive aspect of lobbying. However, in the UK (53%) and Finland (47%) around half of respondents saw it as the most positive aspect of lobbying.

### What would you say is the most positive aspect of lobbying?



### WHAT ARE THE NEGATIVE ASPECTS OF LOBBYING?

With 26% of respondents across Europe identifying it as the most negative aspect of lobbying, a lack of transparency remains the most prevalent weakness in lobbying practice. Giving undue weight in the process to elites and the wealthy (24%) and not providing neutral information (23%) follow close behind.

EU-level respondents see a lack of transparency (30%) and not providing neutral information (34%) as the most negative aspects of lobbying. A lack of transparency is most often identified as the most negative aspect of lobbying in Estonia (60%) and least often in Romania (5%).

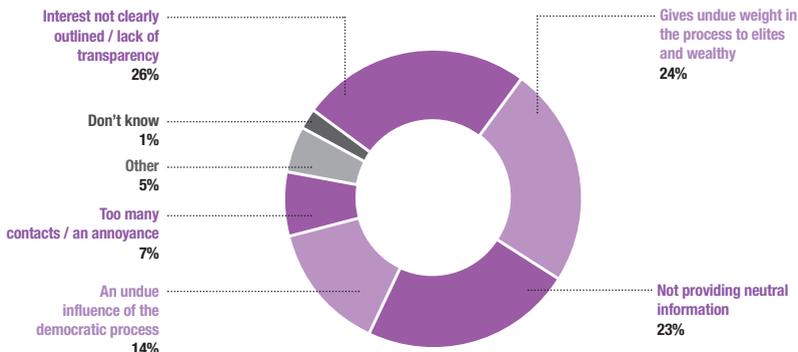
While an average of 24% respondents in Europe see giving undue weight in the process to elites and wealthy as the most

negative aspect of lobbying, there are wide divergences between countries. In Spain (5%) and Italy (3%) it is not seen as particularly problematic; in contrast decision-makers in Norway (55%), Hungary and Romania (both 40%) see this aspect as the most negative.

Around a quarter of respondents in France and Greece perceive the most negative aspect of lobbying to be its undue influence on the democratic process, rising to 33% in the Czech Republic (where it was, like in Greece, the top-ranking answer).

Lobbying overkill ('too many contacts') is not seen as a big issue in Europe in general (7%) or in any particular country, peaking as a response in the UK, Italy and Latvia (all 13%).

### What would you say is the most negative aspect of lobbying?



## HOW TRANSPARENT ARE LOBBYISTS?

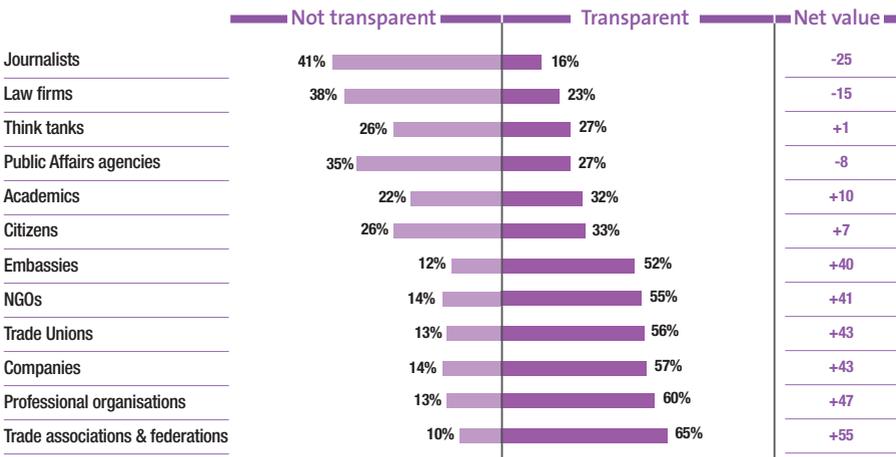
Nearly nine out of ten respondents across Europe either strongly agree (25%) or agree (64%) with the statement that “ethical and transparent lobbying helps policy development.”

In Estonia and Portugal all respondents agreed on this point, and the overall figure topped 90% in Brussels, Denmark, Finland, Germany, Hungary, Italy, Latvia, Lithuania, Poland and the UK. Around half of EU officials (48%) and decision-makers in Estonia (53%) and Norway (48%) strongly agreed with this statement.

The highest level of disagreement or strong disagreement with the statement came in France (31%) and Greece (26%).

Across Europe, journalists (41%) and law firms (38%) are perceived by respondents as being least transparent lobbyists. Trade associations and federations (65%) and professional organisations (60%) are perceived as the most transparent, with companies (57%), trade unions (56%) and NGOs (55%) following closely. With 27% of respondents in Europe considering them transparent in lobbying - and 35% seeing them as not transparent - public affairs agencies perform poorly in comparison with the other organisations most widely perceived in Europe as being ‘lobbyists’ (see above).

## How transparent are lobbyists?



### REGULATION OF LOBBYING

The majority (56%) of respondents across Europe think that lobbying is not sufficiently regulated in their country. Half that number (28%) believe that there is enough regulation.

In Norway (59%), Denmark (57%) and Poland (50%) at least one in every two policy-makers surveyed considered lobbying to be sufficiently regulated. At the opposite end of the spectrum, respondents in Portugal (100%), Spain (93%), the Czech Republic (88%) and Italy (87%) are those most strongly asserting that lobbying is not sufficiently regulated.

The lowest level of awareness about the level of regulation of lobbying is demonstrated in the Netherlands, with half of respondents not knowing whether lobbying is sufficiently regulated.

At EU level, more respondents think that lobbying is sufficiently regulated (48%) than those who think it is not (34%).

The expectation of respondents across Europe regarding further regulation of lobbying in the next three years is very divided. 38% expected further regulation, 35% did not, and 27% did not know. Around two-thirds of respondents in Estonia (67%), Latvia (67%) and Romania (65%) expected further regulation in the next three years. Most respondents in the UK and Germany agreed.

At least half of respondents in Poland (60%), France (50%) and Sweden (50%) do not expect further regulation of lobbying in the next three years.

### Do you think that lobbying is sufficiently regulated in your country?

	All	EU	CZ	DK	ET	FI	FR	DE	GR	HU	IT	LA	LI	NL	NO	PL	PT	RO	ES	SE	UK
Yes	28	48	6	57	27	47	31	44	3	0	0	27	19	28	59	50	0	10	0	38	33
No	56	34	88	34	53	50	67	30	71	75	87	67	47	22	24	37	100	75	93	25	53
Don't know	16	18	6	9	20	3	2	26	26	25	13	7	34	50	17	13	0	15	7	38	13

### MANDATORY REGISTERS

The data suggests that there is a lack of knowledge concerning the type of regulation that applies to lobbying in individual European countries. This is most starkly

demonstrated in Lithuania, where 28% of respondents believe lobbying is not regulated, 16% believe there is a voluntary register, 38% believe there is a mandatory register and 19% do not know.

Poland is an exception with 80% of respondents saying lobbying was regulated through a mandatory register. 73% of respondents in the UK stated that lobbying is regulated through a voluntary register.

In Brussels 45% of respondents believe that a voluntary register is in place, while more than a quarter of respondents (27%) believe a mandatory register is in place, suggesting that while there is awareness of some type of regulation, the exact form is not widely known.

Across Europe more than half of respondents (53%) believe that a mandatory register for lobbyists would be useful in their country. This view is most strongly present in Portugal (88%), Poland (87%), Italy (83%) and at EU level (79%).

Norway is the only country where more than half of respondents (51%) do not think a mandatory register would be useful. However, there is low enthusiasm for a mandatory register in Finland and Sweden too (24% and 19% of respondents respectively believing that it would be useful).

.....

### How useful do you think that a mandatory register for lobbyists would be in your country?



# — LOBBYING EFFECTIVENESS —

When asked about the effectiveness of lobbying organisations, respondents generally perceived trade associations as the most effective (62% of respondents across Europe ranking them as 'effective' or 'very effective'). Professional organisations (51%) and non-governmental organisations (NGOs 46%) came next. Companies, trade unions and public affairs agencies followed closely behind (all ranked as 'effective' or 'very effective' by more than two in every five respondents).

A notable exception was in Germany, where respondents found NGOs (78%) and public affairs agencies (71%) to be the most effective. Across Europe, respondents perceived citizens as the least effective lobbyists, with only 21% seeing them as 'effective' or 'very effective' (although in Norway and the UK this score doubled).

In the 'corporate' sector (i.e. organisations representing business interests), the energy and healthcare sectors were perceived to have the most effective lobbyists, scoring 68% and 60% respectively ('effective' or 'very effective'). Financial services (53%) and agriculture (52%) came third and fourth in the rankings.

In a number of countries, including Germany, France and the UK, the defence industry was also perceived as particularly effective, scoring more than 60% for its effectiveness in lobbying. In Belgium, Italy and the UK, the chemicals industry was also perceived as 'effective' or

'very effective' by more than 60% of respondents, although Europe-wide it scored much lower (37%).

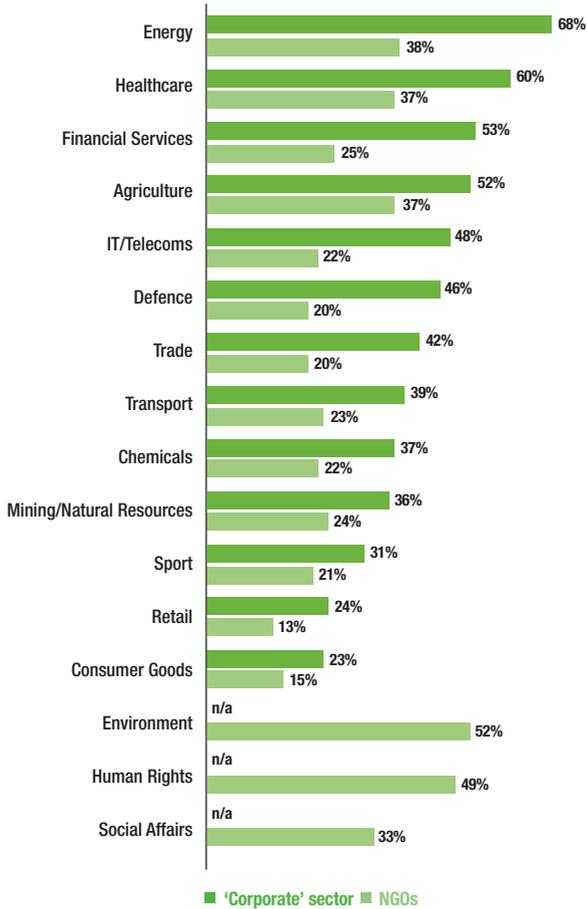
At the least effective end of the spectrum, respondents found the consumer goods and retail sectors to be least effective, with only 23% and 24% of respondents respectively believing that their lobbying is effective. Around the same number of respondents saw lobbyists in these sectors as ineffective.

With regard to NGOs, the lobbyists perceived to be most effective are those working on the environment (52% ranking lobbyists in this field as 'effective' or 'very effective') and human rights (49%). The third most effective NGO lobbyists were in the energy sector (38% - some way behind their corporate counterparts, who scored 68%). In Germany and Norway, energy NGOs were perceived as the most effective.

Healthcare, agriculture and social affairs NGOs were rated as 'effective' or 'very effective' by around a third of respondents.

As with the 'corporate' sector, retail and consumer goods representatives were perceived as the least effective, scoring only 13% and 15% respectively. NGOs in these sectors – as well as trade, defence, sports, IT/telecoms, chemicals and financial services were all deemed to be more ineffective than effective.

How would you rate the effectiveness of 'corporate' lobbying organisations versus the effectiveness of NGOs?



## POOR PRACTICE

Our survey suggests that across Europe a significant number of lobbyists in both the 'corporate' and NGO sectors have difficulty understanding the political and legislative process, with 37% of respondents saying that this failing frequently applies to 'corporate' lobbyists and 39% to NGO lobbyists. Around a third of respondents said that each sector comes into the process too late or too early (32% for the 'corporate' sector, 37% for NGOs).

Other complaints are more specific to the two different sectors: 'corporate' lobbyists are more likely to be criticised for not being sufficiently transparent about the interests they represent (48% of respondents say this is a frequently-committed poor practice by 'corporate' lobbyists, while only 23% make the same complaint of NGO lobbyists). A lack of transparency among 'corporate' lobbyists does not seem to be a significant issue in Estonia, Latvia, Norway, the Netherlands, the UK and Denmark (all at 30% or below) but it is a major issue in the Czech Republic (71%) and Greece (61%) and France (60%).

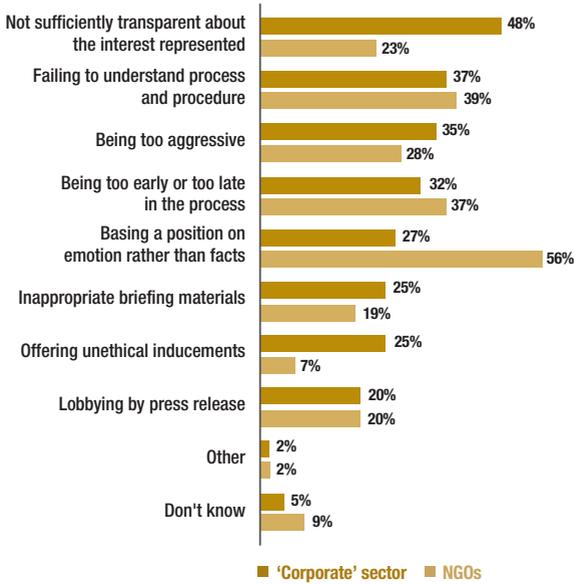
NGOs are more likely to be guilty of basing positions on emotion rather than facts, according to the respondents: 56% make this complaint of NGOs while less than half that number (27%) say the same about companies, trade associations and other 'corporate' lobbyists.

A quarter of respondents said that 'corporate' lobbyists use inappropriate briefing materials (peaking at 52% in Norway). Just under one fifth (19%) make the same claim regarding NGOs (with a peak again in Norway, at 38%). Both 'corporate' lobbyists and NGO lobbyists are often guilty of being too aggressive – 35% of respondents cited this as a problem for the former group and 28% for the latter (although in Germany the number is more than double, at 59%).

More worryingly, there is still a significant problem with 'corporate' lobbyists offering what are perceived to be unethical inducements: one in four respondents said that this was a frequently-committed poor practice (for NGOs, the figure was 7%).

This headline figure does mask stark variations between countries, however: in the Czech Republic (38%), France (45%), Greece (42%), Lithuania (56%), Poland (43%) and the UK (43%) more than one in three respondents cited this as a problem – in eight other countries and in Brussels, less than one in five said the same. For NGOs there are spikes in 'unethical inducements' response for Germany and Romania.

Thinking about poor practice in lobbying, which of the following would you say are the most frequently committed by NGOs, and by private companies and industry associations ('corporate' sector)?



# CHANNELS OF INFLUENCE

## WHAT SOURCES OF INFORMATION DO RESPONDENTS FIND MOST HELPFUL?

The Europe-wide data suggests that the sources of information that respondents find most useful are internal meetings and documents from national authorities. Both sources are seen as ‘helpful’ or ‘very helpful’ by 70% of respondents. Internal meetings are perceived as particularly useful at EU level (84%) and in the UK (84%) and Estonia (80%).

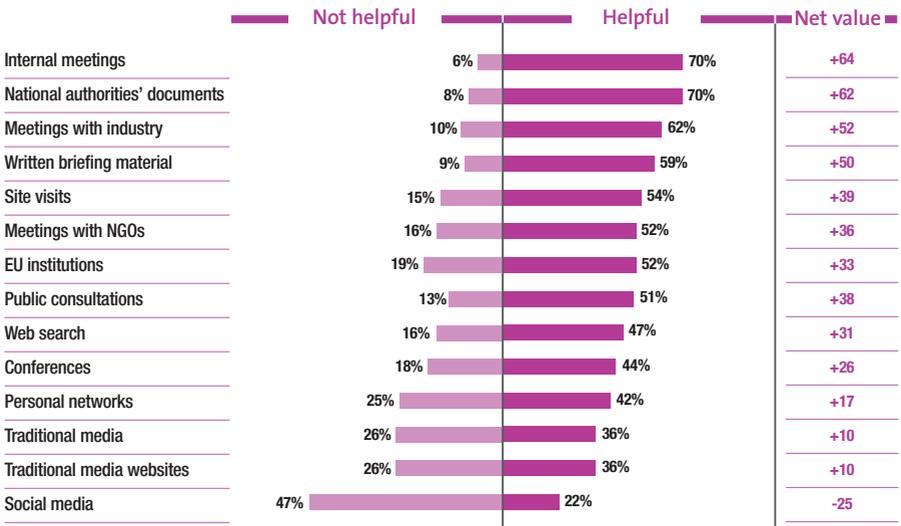
62% of respondents believe that meetings with industry provide a useful source of information helping them through the decision-making process. 59% said the same for written briefings. Industry

meetings were seen as particularly helpful in Italy (80%), Latvia (80%), Lithuania (81%) and Estonia (80%).

Just over half of the respondents said that site visits (54%) are useful – a similar proportion as for meetings with NGOs and information from the EU institutions (both 52%). Public consultations were seen as ‘helpful’ or ‘very helpful’ by one in two regulators, and only 44% see conferences as helpful.

Based on our survey, social media and traditional media, including media websites, appear to be seen as not particularly helpful.

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



## WHAT ARE THE MOST HELPFUL ONLINE MEDIA SOURCES USED BY RESPONDENTS?

Respondents considered sectoral news sources and government websites to be the most helpful online media sources (58% and 50% respectively ranking them as 'helpful' or 'very helpful'). After that, respondents ranked scientific or educational websites as the most helpful (46%), with 39% saying the same of traditional media websites. 31% of respondents saw industry association websites as helpful – but 30% said they were not helpful.

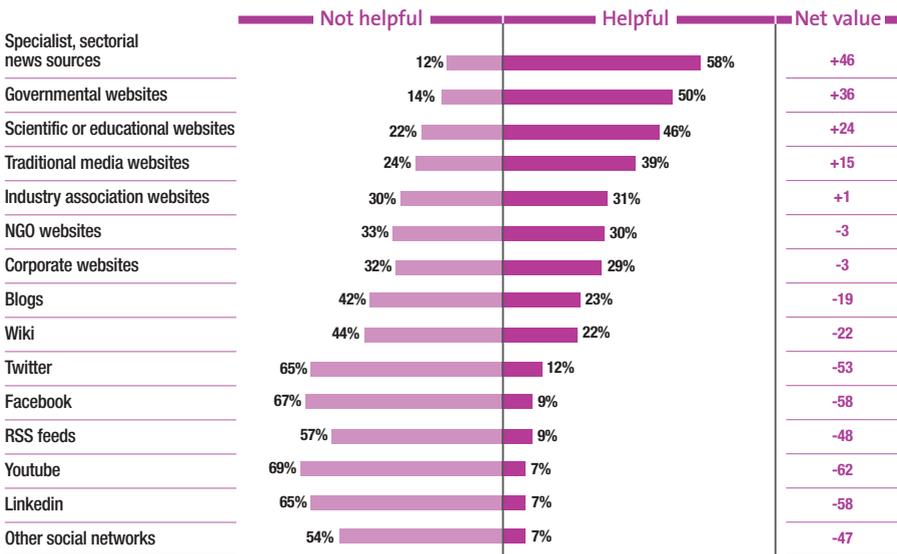
For all other sources, respondents across Europe said that they were more unhelpful than helpful – including NGO websites (33% unhelpful, 30% helpful) and corporate

websites (32%-29%). Blogs and wikis were seen as unhelpful by double the number of respondents who found them to be helpful, and social media sources, including Twitter, Facebook, YouTube and LinkedIn, were seen as unhelpful by around two-thirds of respondents.

Sectoral news sources were perceived as particularly helpful in Brussels (75%), Italy (70%), Latvia (86%) and the Netherlands (72%). Scientific and educational websites were seen as extremely useful in Greece (68%), Hungary (65%) and Portugal (78%).

Despite a poor ranking overall, blogs were perceived as a helpful media source in Hungary (55% saying they are 'helpful' or 'very helpful' - more than twice the European average).

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



### WHAT ARE THE MOST FREQUENTLY-USED SOCIAL MEDIA AND DIGITAL SOURCES?

They may not be seen as particularly helpful, but respondents told us that they are still regular users of social media and digital information sources.

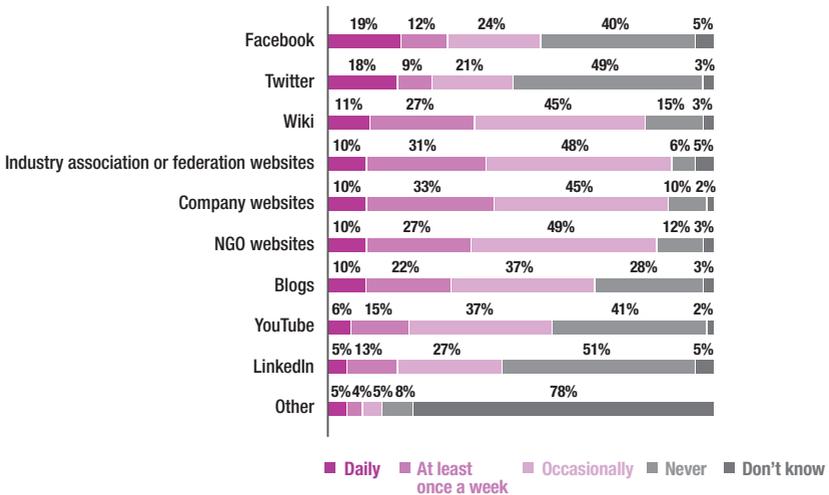
The policy-makers we surveyed most often consult company websites (43% using them daily or at least once a week), industry association websites (41%), NGO websites (37%) and Wikipedia (38%).

Nearly a fifth of the respondents use Facebook daily, and a similar proportion uses Twitter every day (although 49% never use it). Around a third of respondents consult blogs daily or at least once a week.

In particular, our data suggest that regulators in Finland (46%), Germany (59%), Portugal (67%) and Spain (61%) consult company websites daily or at least once a week. For industry association websites, regulators in Germany (67% using them daily or at least once a week), Portugal (73%) and Sweden (62%) ranked among the most frequent visitors.

Those policy-makers surveyed in the UK (60%), Estonia (60%), Greece (68%) and Hungary (60%) consult blogs most often and respondents from the Netherlands (39%), Latvia (73%) and the UK (63%) are most frequent users of Twitter, using the service daily or at least once a week.

### How frequently do you consult the following social media/digital sources for issues related to your work?



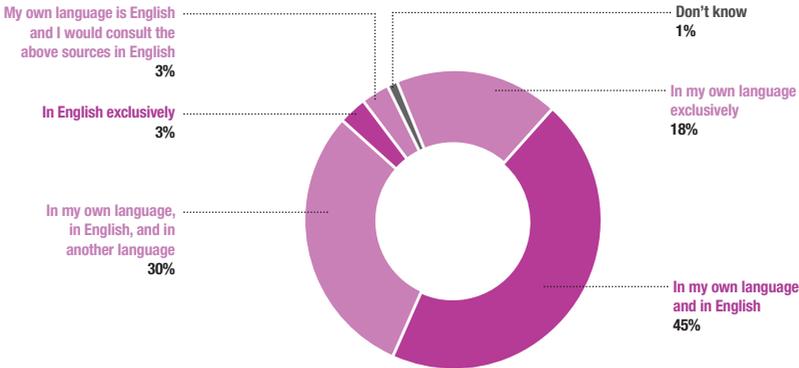
## WHAT IS THE MOST COMMON LANGUAGE USED WHEN CONSULTING DIGITAL SOURCES OF INFORMATION?

45% of respondents feel comfortable with consulting digital sources of information in their own language and in English. A further 30% use an additional language. Only 18% of respondents whose main language is not English consult digital sources in their own language exclusively.

Our survey found that respondents in the UK consult digital sources only in English. 40% of Czech respondents use only Czech.

The highest proportion of respondents consulting sources of information in more than two languages were in Brussels (48%), Estonia (73%), Italy (50%) and Latvia (93%).

### In which language do you consult the above digital sources of information?



# COUNTRY INSIGHTS

## Brussels: EU institutions

- > 48% of respondents in Brussels strongly agree that ethical and transparent lobbying helps policy development
- > A lobbyist is more likely to get a meeting if they are transparent (64%), publically registered (57%) and providing relevant useful information
- > 'Corporate' lobbyists' reputation for effectiveness is seen across a wide range of sectors, particularly agriculture (75%), energy (77%), healthcare (71%) and chemicals (66%)

EU-level lobbying in Brussels shows a number of distinctions when compared to lobbying at a national level. Those surveyed have a far broader definition of a 'lobbyist' than their national counterparts and have a higher perception of lobbying in terms of transparency and effectiveness.

48% of respondents in Brussels believe that ethical and transparent lobbying helps policy development, compared with an average of 25% across the EU. They see the main positive role of lobbying as ensuring the participation of social and economic actors and citizens in the political process and providing useful and timely information.

In Brussels, our survey suggests that a lobbyist is more likely to get a meeting if they are transparent (64%), are registered as a lobbyist (57%), and providing information on a topic of interest (55%) or in the policy-maker's field of expertise (77%). The weight given to transparency means that there is growing demand for further regulation in

the form of a mandatory register (79%) and many expect it to come within the next three years (48%).

Perhaps due to the increasing importance of policy-making at EU level, stakeholders across the board are working hard to increase the effectiveness of their lobbying in Brussels. Companies, embassies and NGOs are perceived as more effective by respondents in Brussels than by those at the national level. 'Corporate' lobbyists' reputation for effectiveness is seen across a wide range of sectors, particularly agriculture (75%), energy (68%), chemicals (66%) and healthcare (64%), which are perceived to be the most effective. NGOs are rated as most effective on environmental issues (68%) and human rights (66%).

Despite the clear demand for transparency some companies continue to fail to be sufficiently transparent about the interests they represent (cited as a poor practice by 55% of respondents in Brussels – slightly



higher than the European average). Being too aggressive (cited by 48% of respondents in Brussels compared with a European average of 35%) and failing to understand procedure (43%) are also commonly-cited problems. Being too late or too early in the legislative process was a failing identified by around one third of respondents.

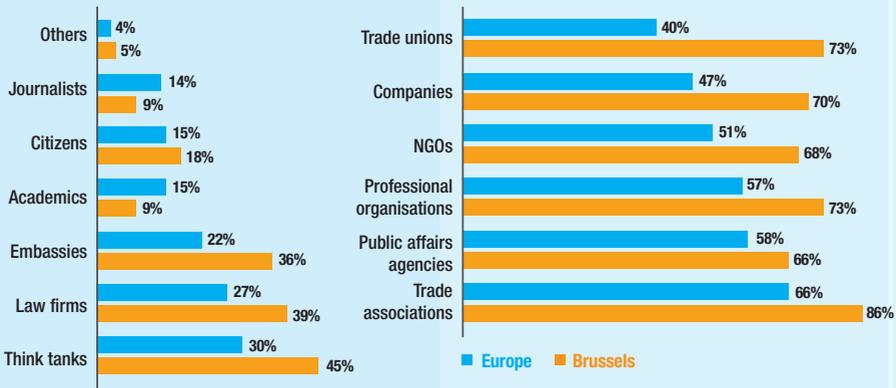
The problems for NGOs are different: the most frequently-committed poor practice is basing a position on emotion rather than facts (75%) and, unlike companies, being too early or too late in the process (50%).

Helpful sources of information include some cited at national level – internal meetings (84%), national authorities’ documents (78%) and written briefing material (75%) – but also many sources

particularly valued in Brussels, including industry meetings (80% versus a European average of 62%) and, perhaps unsurprisingly, the EU institutions (87% compared with a European average of 52%). Industry associations’ websites (perceived as ‘helpful’ or ‘very helpful’ by 53% of respondents), NGO websites (41%) and corporate websites (43%) are seen as useful tools – certainly more so than at national level, where the scores for each of these are around 30%.

There is growing demand for mandatory regulation of lobbying, but this is a demand for transparency, not a rejection of lobbying. In fact, transparent stakeholders who understand the decision-making process and provide useful information are highly valued by policy-makers in Brussels.

### In your experience which of the following could be considered as matching the description of a ‘lobbyist’?



## Czech Republic

- ▶ A majority of respondents (88%) felt that lobbying is not sufficiently regulated in the Czech Republic
- ▶ Private companies are viewed by most respondents as having a good understanding of the policy-making process and procedure

Respondents in the Czech Republic saw the most negative aspect of lobbying as the potential for it to be an undue influence on the democratic process – cited by one in every three respondents as their main concern. When asked about the positive aspects of lobbying, raising the local or national importance of an issue was cited by only 6% of respondents compared to a European average of 20%.

A relatively low percentage (15%) classed trade unions as lobbyists, compared with 40% across Europe. There were also significantly lower scores for trade associations (27% compared with a European average of 66%) and NGOs (25% versus 51%). The score for all groups was lower than the European average.

Almost all groups were seen as less transparent by respondents in the Czech Republic than by their counterparts across Europe. For example, only 37% saw trade associations as ‘transparent’ or ‘very transparent’ compared with a European average of 65%.

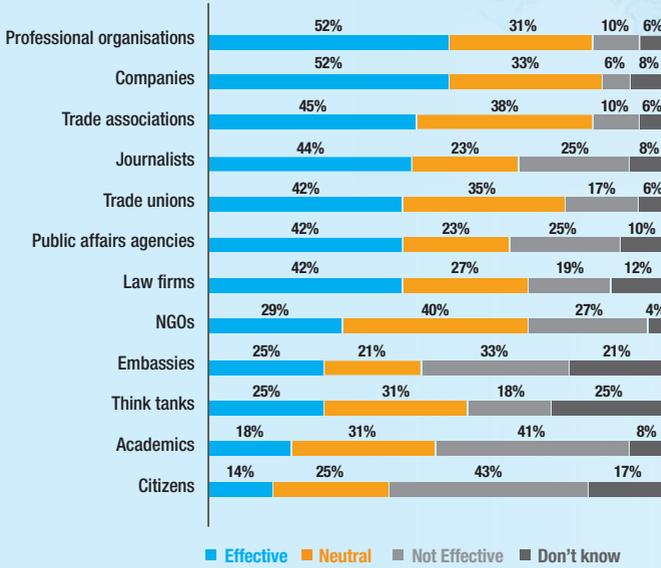
“It is necessary to adopt a law and a register on lobbying. It is the only way to find out who they represent.”

The overwhelming majority of respondents (88%) felt that lobbying is not sufficiently regulated in the Czech Republic. However, less than one in six of the respondents thought that it would be further regulated in the next three years.

In contrast with the overall trend in our survey, NGOs were viewed as effective in their lobbying by only a third of respondents in the Czech Republic. Private companies are viewed by most respondents as having a good understanding of the policy-making process and procedure – more so than in many other countries in the report.



## How would you rate the effectiveness of lobbying of the following organisations?



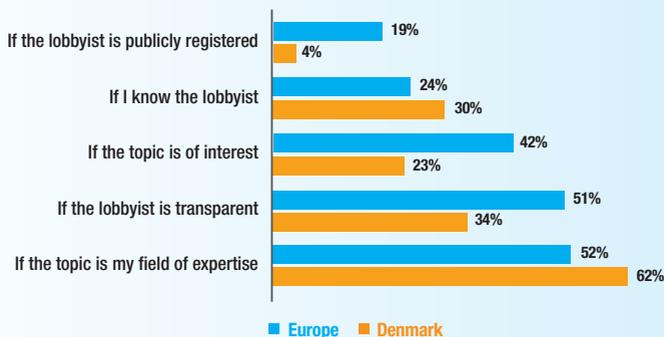
# Denmark

- > Respondents generally believe that lobbying is sufficiently regulated in Denmark
- > They find media sources to be less useful in making informed decisions compared with the European average
- > Personal networks count in securing meetings and supporting informed decision-making

Although there is far from a clear consensus, respondents in Denmark generally agree that the most positive aspects of lobbying are the provision of useful and timely information (32%) and raising the local/national importance of an issue (28%). Few respondents believe that lobbying translates technical/scientific information into relevant information (4%).

64% of Danish respondents noted that they had refused a meeting with a lobbyist. Whether the lobbyist is transparent was a factor for just over a third of respondents in deciding whether to speak to lobbyists – significantly lower than the European average. Other factors – such as whether the topic is of interest (23%) and whether the lobbyist is publicly registered (4%) – were not important deciding factors in Denmark.

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





For respondents in Denmark, poor lobbying practices by the 'corporate' sector include a failure to understand the legislative process and procedure (49%), being too early or too late in the process (40%) and inappropriate briefing materials (32%). Interestingly, failure to be transparent about the interest represented (30%), being too aggressive (21%) and offering what are perceived to be unethical inducements (2%) were not reported as being so problematic.

The survey results also show that respondents in Denmark rely heavily on their personal networks (51%) to help them make informed decisions in their work, but view industry meetings (38%), written

briefing material (30%), site visits (34%) and conferences (17%) as less useful. The usefulness of media sources in decision-making among respondents in Denmark was found to be lower than the European average – and particularly significantly for blogs, Twitter and Wikipedia.

“ People can see who you talk to, but you still cannot see what impact it had on decisions. That you have spoken with an organisation or lobbyist is not equal to agreeing with them. ”

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

Results showing responses for 'helpful' and 'very helpful'



# Estonia

- > Lack of transparency is identified as the most negative aspect of lobbying in Estonia
- > Estonian respondents are willing to disclose information about their meetings with lobbyists

The aspect of lobbying which respondents in Estonia appreciate most is that it ensures the participation of social and economic actors and citizens in the political process. 60% of respondents deemed this to be the most positive aspect of lobbying compared with a European average of 37%.

However, while respondents seem to support a political process that is open to a wide range of interest representatives, lobbyists are expected to be clear about

their motivation. Not clearly outlining interests or a lack of transparency is identified as the most negative aspect of lobbying: out of all the countries surveyed, Estonia is one of the most sensitive when it comes to transparency (60% consider it to be the most negative aspect of lobbying; the European average is less than half that, at 26%). All respondents from Estonia agree that ethical and transparent lobbying helps policy development (the European average is 89%).

## Most negative aspects of lobbying



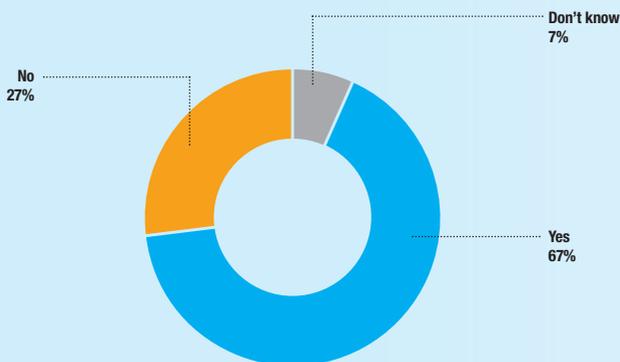


As transparency is such an important and delicate topic in Estonia, respondents themselves are comparatively open about their meetings with lobbyists. Although Estonia scores below the European average in terms of reporting meetings to hierarchy (40% compared with 43% across Europe), 87% of the respondents are willing to disclose information about their meetings, if asked (the European average is just 37%). 53% of respondents in Estonia sometimes mention meetings on their website, nearly three times the European average (18%).

67% of respondents in Estonia have refused meetings with lobbyists. They highlight a transparent lobbyist (93%) and a well-prepared lobbyist (87%), as well as a topic of interest (80%) as the most influential factors when deciding whether to meet with lobbyists.

“Successful lobbying can change society and attitudes. Unsuccessful lobbying results only in a media uproar.”

### Have you ever refused a meeting with a lobbyist?



## Finland

- Trade associations and trade unions are the groups most commonly perceived as ‘lobbyists’, followed by NGOs
- The majority of Finnish respondents perceived a lack of transparency as the most negative aspect of lobbying

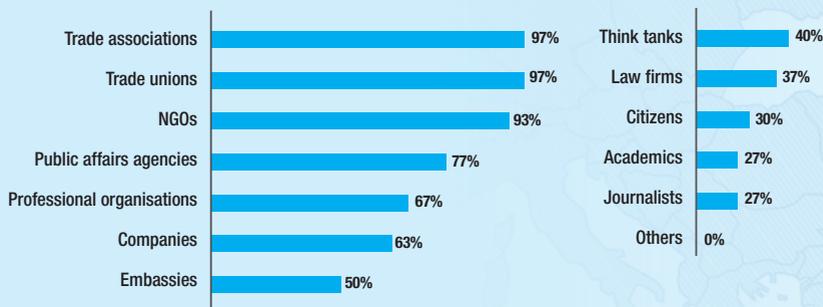
“ A successful approach is one in which attention is paid to the problem that we want to solve. It does not allow emotions to influence the presentation. ”

Respondents from Finland identified the positive aspects of lobbying as raising the local and national importance of an issue (47%) as well as providing useful and timely information (33%). 90% of respondents thought that ethical and transparent lobbying helps policy development. A vast majority of respondents perceived a lack of transparency as being the most negative aspect of lobbying (40%).

Trade associations and trade unions are considered to best match the definition of a ‘lobbyist’, followed closely by NGOs and then public affairs agencies. Trade associations and NGOs are seen as being the most transparent, with trade associations and trade unions considered to be the most effective lobbyists. Respondents perceived ‘corporate’ lobbyists in the energy sector (80%) and trade (73%) to be the most effective.



Which of the following could be considered as matching the description of a 'lobbyist'?



“Transparency and openness are the key words.”

Finnish respondents were divided when asked if they thought lobbying was sufficiently regulated in their country or if they thought that it may or may not be further regulated in the next three years. 47% of respondents thought lobbying was not regulated at all, while 53% thought that lobbying was regulated through a voluntary register.

Finnish respondents are most willing to speak to lobbyists if they are transparent about whom they represent (70% of respondents giving this answer) and if the topic is of interest to them (70%). 60% of respondents have refused meetings with lobbyists.

90% of respondents find that the most useful source of information in helping to take a decision comes from national authorities' documents as well as internal meetings (77%).

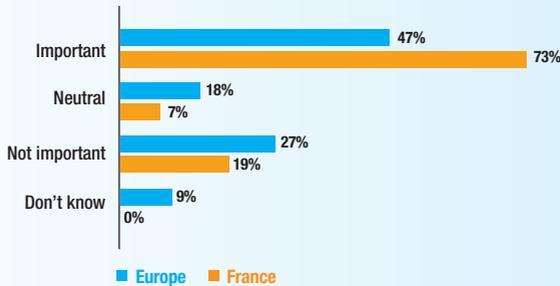
# France

- > Professional organisations score highest in terms of transparency
- > More than 70% of respondents in France prefer to be approached by French lobbyists on issues of French national interest
- > Two-thirds of French respondents believe lobbying is not sufficiently regulated in France

38% of French respondents believe that the most positive aspect of lobbying is its capacity to ensure the participation of social and economic actors and citizens in the political process, in line with the

European average. Negative aspects include the provision of biased information and the lack of transparency (both 26%).

## How important is it that you are approached in your own language on an issue of national interest ?



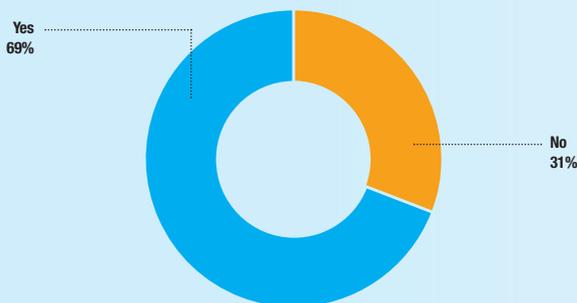
Professional organisations score highest on transparency, with 80% of those surveyed considering them to be 'transparent' or 'very transparent'. Trade unions are also considered to be more transparent in France than the European average.

On regulation, 67% of respondents in France believe that lobbying is not sufficiently regulated and 57% think that a mandatory register would be 'useful' or 'very useful'. France is also one of the countries with the highest meeting



refusal rate (69% of respondents stating that they had turned down a meeting with a lobbyist).

### Have you ever refused a meeting with a lobbyist?



Compared with a much lower European average (47%), respondents in France consider being approached by someone in French on an issue of French national interest to be very important (73%).

Like in the rest of Europe, energy, healthcare and agriculture are identified as the most effective sectors in terms of 'corporate'

“It is vital that we know who [the lobbyists] are and we have a very clear vision of the interests they are defending. We like people who come with solid arguments.”

“A successful approach is a transparent one and one with clarity of purpose. A poor approach involves ambiguity, arguing, a hidden agenda and not taking into account who they are speaking to.”

lobbying, and NGOs score highest in the human rights and environment sectors. However, 57% believe that NGOs frequently base their positions on emotions rather than facts.

According to the data, Wikipedia is the digital source French respondents consult most frequently for issues related to work (57%).

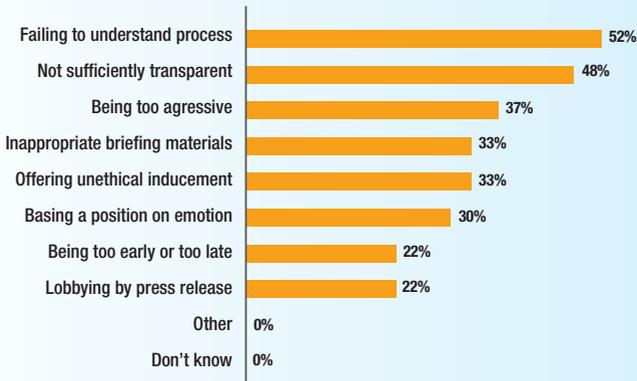
# Germany

- > German respondents state that the lobbying process gives undue weight to elites and the wealthy
- > Almost all groups are less likely to be seen as ‘lobbyists’ in Germany than elsewhere in Europe
- > German regulators prefer to be approached in their own language on issues of national interest

Respondents in Germany see giving undue weight to elites and the wealthy as the biggest problem with lobbying – 30% of them having stated that this is the most negative aspect of lobbying. Not providing neutral information and being insufficiently transparent were each ranked by 26% of respondents as the most negative aspect of lobbying.

With regard to the definition of a ‘lobbyist’, for most groups respondents in Germany are more reluctant to call them ‘lobbyists’ than in the rest of Europe: for example, only 37% see trade associations as lobbyists (against a European average of 66%), 30% see professional organisations as lobbyists (European average: 57%) and just 26%

Thinking about poor practice in lobbying, which of the following would you say are the most frequently committed by private companies and industry associations?





see NGOs as lobbyists, around half the European average (51%).

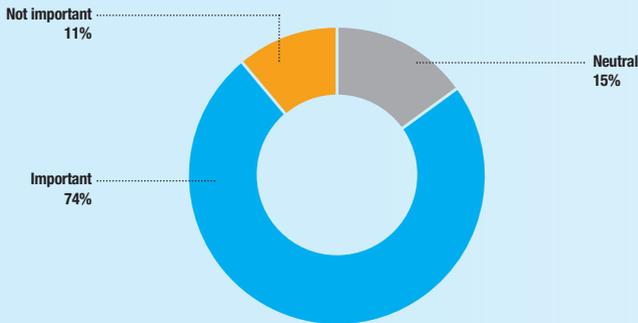
In terms of transparency, professional organisations score particularly badly – only 19% of respondents see them as ‘transparent’ or ‘very transparent’ compared with a European average of 60%. However, German respondents were also less likely to report on meetings – internally or externally – than their counterparts across Europe.

With regard to poor practice, a failure to understand the process is the most common failing of lobbyists in Germany, according to respondents.

Respondents in Germany saw NGOs as particularly effective – 78% claiming that they are ‘effective’ or ‘very effective’ compared to a European average of 46%. Public affairs agencies are also seen as effective (71% rating them as ‘effective’ or ‘very effective’ compared with a European average of 42%).

74% of respondents in Germany indicated that being approached in German on an issue of national interest is very important – the highest score for any European country except the UK.

### Being approached in one’s own language on an issue of national interest?



# Greece

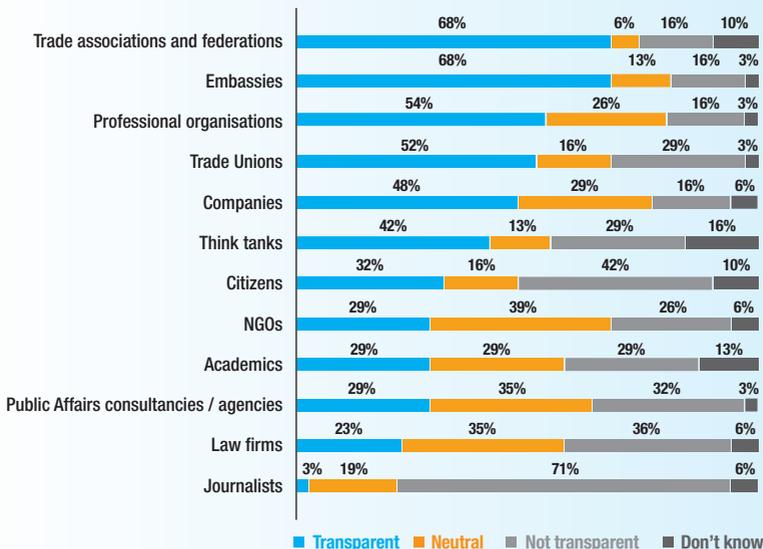
- > Nearly one in three respondents (29%) said that they tend not to or never disclose information about meetings
- > One in four are concerned that lobbying gives undue weight in the policy-making process to the interests of the elites and wealthy

Ensuring the participation of social and economic actors and citizens in the political process is the most positive aspect of lobbying for 32% of respondents in Greece. However, 26% of respondents view lobbying as an undue influence on the democratic process, and 23% are concerned that it favours the elites and wealthy.

Nearly one in every four respondents (26%) does not believe that ethical and transparent lobbying helps policy development – the second highest percentage among the countries surveyed, and an indication of scepticism or suspicion regarding lobbying in Greece.

Transparency is a major issue in Greece. Most respondents criticised companies

## To what extent would you say each of the following is transparent in lobbying?





and industry associations for not being transparent enough about the interest represented, while 42% said that offering what are perceived to be unethical inducements is frequent practice. A lack of transparency is also one of the main concerns regarding NGO practice - only 29% of respondents saw NGOs as 'transparent' or 'very transparent'. Trade associations and embassies are seen as the most transparent lobbyists, with 68% each of these groups judging to be 'transparent' or 'very transparent'.

“ [A transparency register] will not help a lot. To a great extent lobbying is carried out by non-professionals, who therefore are not subject to any rules. They would actually outweigh the professionals if any mandatory requirements are adopted. ”

Among policy-makers surveyed, 26% report meetings with lobbyists to their hierarchy and the same proportion discloses information about meetings if asked. One in six respondents (16%) said that they tend not to disclose information about meetings and 13% said they never do. Even though 71% of respondents

agree that lobbying is not sufficiently regulated in Greece, opinion is divided on whether a mandatory register would be useful.

Based on our survey, embassies are perceived as the most effective lobbyists in Greece (61% seeing them as 'effective' or 'very effective'). In the 'corporate' sector, the energy, healthcare and defence industries score highly, while environment and human rights NGOs are seen as the most effective civil society groups.

Documents from EU institutions and national authorities are the preferred sources of information, along with meetings with industry. Less than a third of respondents found meetings with NGOs 'helpful' or 'very helpful'; the figure for public consultations was similar. 80% of respondents said they access helpful information online; this information was found mainly on scientific websites and on specialist or traditional news media websites.

“ [A poor lobbyist is] whoever gets involved caring only about his own interests while ignoring those of others. ”

## Hungary

- Trade associations were considered to be the most effective lobbyists
- 75% of respondents in Hungary considered lobbying to be insufficiently regulated in Hungary

The data suggests that a majority of respondents in Hungary consider ensuring participation of stakeholders in the political process and providing timely and useful information to regulators to be the most positive aspects of lobbying.

At the same time, respondents thought that lobbying risks giving undue weight in the process to particular segments of society, such as elites and the wealthy – this was the most negative aspect of lobbying for 40% of respondents (compared to a European average of 24%).

75% of respondents in Hungary considered lobbying to be insufficiently regulated in their country but more than half did not know whether there would be further regulation in the next three years. Respondents indicated that they are most likely to meet a lobbyist if the issue falls within their field of expertise and the lobbyist is transparent in terms of the interest they represent. Trade

associations were considered to be the most effective lobbyists while public affairs agencies scored highly (55% of respondents saying they are ‘transparent’ or ‘very transparent’) compared with the European average for this group (42%).

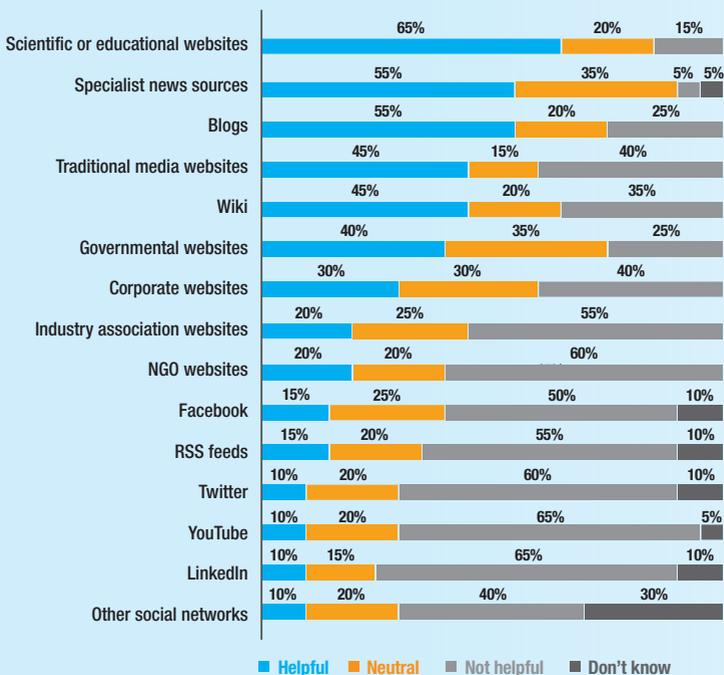
‘Corporate’ lobbyists in the financial services and consumer goods sectors were considered to be particularly effective; civil society organisations were considered most effective on issues of human rights, environment, social affairs and sports. Respondents’ views coincided over poor lobbying practice frequently committed by ‘corporate’ lobbyists and NGOs – notably regarding a lack of transparency and basing a position on emotions rather than facts.

In contrast to most European countries, 60% of Hungarian respondents stated that they turned to their personal networks to obtain information relevant to making decisions, in addition to



internal meetings, national authorities' documents and texts from EU institutions. In terms of media sources, scientific and educational websites (65%), blogs (55%) and Wikipedia (45%) were considered most helpful in providing respondents with the information they required.

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



# Italy

- > The vast majority considers a mandatory lobby register useful and necessary – but there is little confidence that it will happen
- > Industry association websites, NGO websites and YouTube are the most frequently consulted digital sources

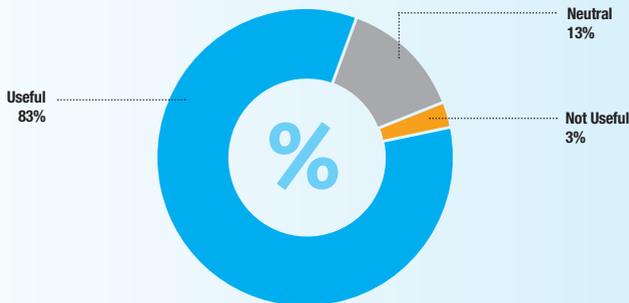
Respondents in Italy are in line with the European average by identifying the participation of social and economic actors and citizens in the political process as the most positive aspect of lobbying (40% for Italy compared with 37% across Europe). However, the translation of technical or scientific information into relevant information scores second highest among Italian respondents (30% compared with 10% across Europe).

The provision of biased information is seen as the most negative element of lobbying by 30% of respondents in Italy. While 23% are concerned about a lack of transparency and 17% suspect an undue

influence on the democratic process, only 3% fear lobbying could favour elites and the wealthy (the European average for this answer was 24%).

Respondents in Italy stated clearly their belief that lobbying is not sufficiently regulated (87% agreeing, compared with a European average of 56%) and that a mandatory register for lobbyists would be useful (83%, compared with a European average of 53%). However, there is pessimism about whether this will happen: only 30% of respondents are confident there will be further regulations within in the next three years (whereas the European average is 38%).

## How useful do you think a mandatory register for lobbyists would be in your country?



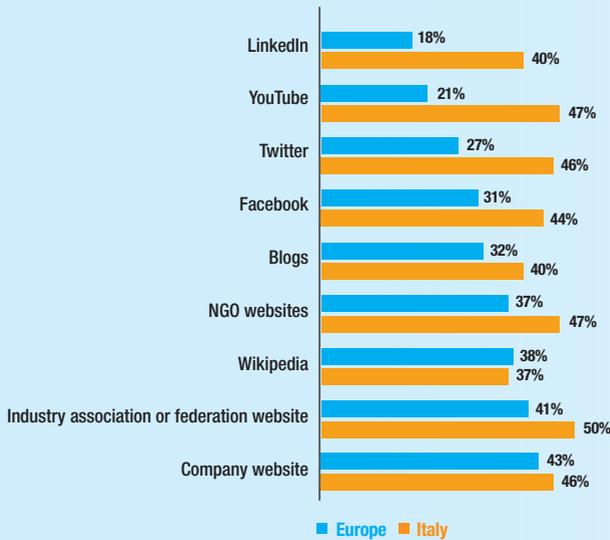


With regard to social media and digital sources, 50% of respondents in Italy stated they consult industry associations or federation websites daily or at least once a week in the context of their work. NGO websites (47%) and YouTube (47% - the highest score in any European country) rank just behind.

“A transparency register in Italy would align Italy with the widespread practice in Brussels. It would allow more transparent consultation and greater professionalism from the lobbyist.”

### How frequently do you consult the following social media / digital media sources for issues related to your work?

Results showing responses for 'daily' and 'at least once a week'



# Latvia

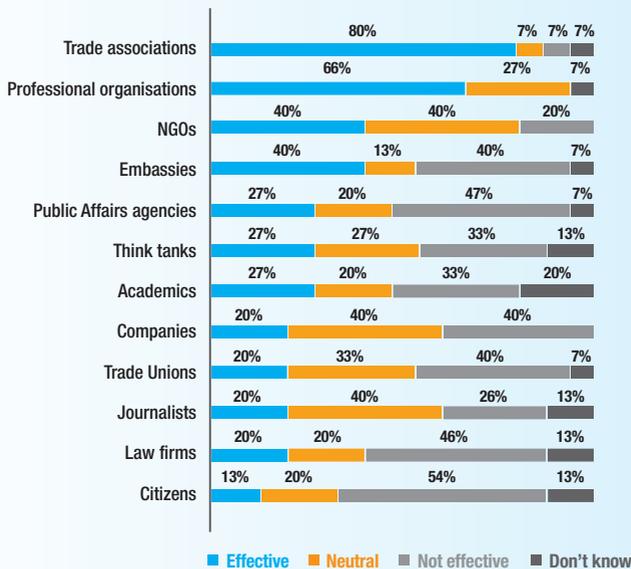
- > Industry meetings were considered to be the most useful source of information (80%)
- > Twitter ranked highest among the most used media sources (73%)

53% of respondents in Latvia saw ensuring the participation of social and economic actors and citizens in the political process as the most positive aspect of lobbying, while raising the local and national importance of an issue was not considered as important as it was in other European countries (7%). A third

of respondents said that the most negative aspect of lobbying was the absence of transparency, and another third said that it gave undue weight to elites and the wealthy.

93% of respondents in Latvia agreed that transparent lobbying is helpful for policy

## How would you rate the effectiveness of lobbying of the following organizations?





“It is not clear what interest he represents.”

development. 80% indicated that NGOs match their description of a lobbyist – well above the European average (51%). Trade associations, public affairs agencies and professional organisations were also cited as lobbyists in greater numbers than across Europe as a whole. Embassies were considered to be lobbyists by 53%, a considerably higher percentage compared with other European countries.

In terms of transparency, around four out of five respondents agreed that trade associations and professional organisations are transparent in their approach to lobbying compared with just one in five for companies.

While respondents agreed that lobbying is not regulated enough in Latvia they believe it will be further regulated in the coming years. However, respondents were divided on whether a mandatory register would be a helpful tool in this respect.

Both the ‘corporate’ sector and NGOs were considered effective in lobbying on agriculture and financial services while

the former also ranked highly on energy issues. It was interesting to note that 60% of respondents indicated that the ‘corporate’ sector often did not understand the process and often tried to intervene either too early or too late in the process, whereas NGOs were criticised for basing their positions on emotion rather than fact.

Industry meetings were considered by respondents to be the most useful sources of information (80% giving this answer). Two-thirds of respondents cited NGO meetings as useful and the same proportion mentioned personal networks.

As for the most used online media sources, specialist news, scientific and educational websites topped respondents’ preferences while Twitter ranked highest among the most frequently-used online media sources (73%). 93% of respondents indicated that they read digital sources in three languages: their own language, English and another language.

## Lithuania

- > Almost half of respondents (47%) felt that lobbying is not sufficiently regulated in Lithuania
- > Defence companies emerged as the least effective lobbyists in the private sector
- > Private companies are viewed by most respondents as having a good understanding of the policy-making process and procedure

Only 12% of respondents in Lithuania classed trade unions as lobbyists, compared with a European average of 40%, while a relatively high percentage (44%) would classify law firms as lobbyists. Trade unions also ranked relatively low on transparency among Lithuanian respondents compared with the responses across Europe.

As with most of the countries surveyed, there seems to be a feeling in Lithuania that lobbying is not sufficiently regulated. Around half of the respondents (47%) felt that lobbying is not sufficiently regulated while a fifth felt that current regulation is sufficient.

Approximately one third of respondents either mention or systematically list meetings with lobbyists on their websites – more than the European average. An obligation to speak to anyone calling was the most commonly named reason for speaking to a lobbyist

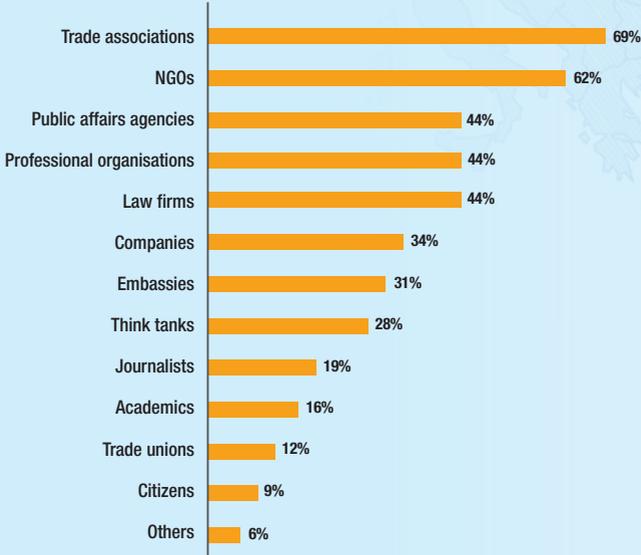
(56%) but only a very small proportion (3%) thinks that speaking to a lobbyist is a usual part of the consultation process.

In contrast to the overall picture, NGOs were viewed as effective in their lobbying by almost a third of respondents (28%). Defence companies emerged as the least effective lobbyists in the 'corporate' sector (ranked as 'effective' or 'very effective' by only 15 % of respondents).

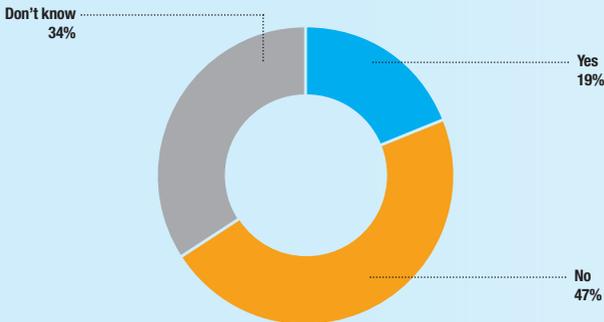
Private companies are viewed by most respondents as having a good understanding of the policy-making process and procedure, unlike in many other countries in the report. Only 9% of respondents criticised the 'corporate' sector in Lithuania for failing to understand process and procedure.



Which of the following could be considered as matching the description of a lobbyist?



Do you think that lobbying is sufficiently regulated in your country?



# The Netherlands

- > Providing useful and timely information is seen as the most positive aspect of lobbying in the Netherlands
- > Transparency is a key issue for Dutch respondents, and the 'corporate' sector rates well
- > Frequent social media use is much higher than the European average

A large majority of respondents in the Netherlands (61%) see the most positive aspect of lobbying as providing useful and timely information while, in contrast to the Europe-wide results (37%), only 6% of the respondents noted ensuring participation of social and economic

actors and citizens in the political process as a positive aspect of lobbying. Raising the local and national importance of an issue is also viewed as a positive aspect of lobbying (28% seeing this as the most positive aspect against 20% across Europe).

## What would you say is the most positive aspect of lobbying?





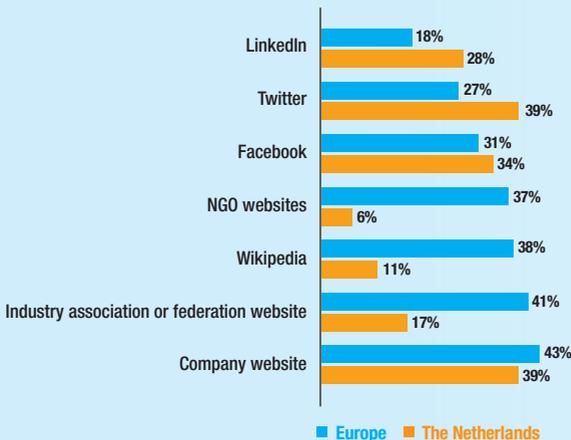
Respondents in the Netherlands clearly value transparency: it is the most important factor influencing the respondents' decision to speak to a lobbyist (67%) and a lack of transparency is seen by respondents in the Netherlands as the most negative aspect of lobbying (39% - well above the European average of 26%).

However, private companies and industry associations are perceived to be more transparent than elsewhere: only 28% of respondents in the Netherlands said that insufficient transparency was a problem compared with a European average of 48%.

Our survey suggests that regulators in the Netherlands consult different kinds of digital sources more frequently for issues related to their work than others in Europe. Respondents are more likely to use social media platforms such as Twitter (39%), Facebook (34%) and LinkedIn (28%) daily or at least once a week than others across Europe. However, NGO websites (6%) are visited less frequently, and the proportion of daily or weekly visitors to these sites is far lower than the European average (37%).

### How frequently do you consult the following social media / digital media sources for issues related to your work?

Results showing responses for 'daily' and 'at least once a week'



## Norway

- A mandatory lobbying register would not be useful in Norway
- A majority (59%) of respondents think that lobbying is sufficiently regulated in Norway

Providing useful and timely information is viewed as by far the most positive aspect of lobbying in Norway. It was cited by 55% of respondents, nearly twice the European average. With regard to the negative aspects of lobbying, regulators in Norway were more concerned than anyone else in Europe about lobbying giving undue weight in the process to elites and the wealthy (55%, against a European average of 24%).

Public affairs agencies were seen as 'lobbyists' by only one third of respondents but were not considered to be particularly transparent – only 45% of respondents stated that they are 'transparent' or 'very transparent'. Professional organisations (97%), NGOs (96%)

and trade unions (90%) scored highest in this regard.

In contrast to many of the countries surveyed, the majority (59%) of respondents think that lobbying is sufficiently regulated in Norway. A quarter of respondents disagreed. Only a small number (13%) of respondents felt that a mandatory register for lobbyists would be useful in Norway.

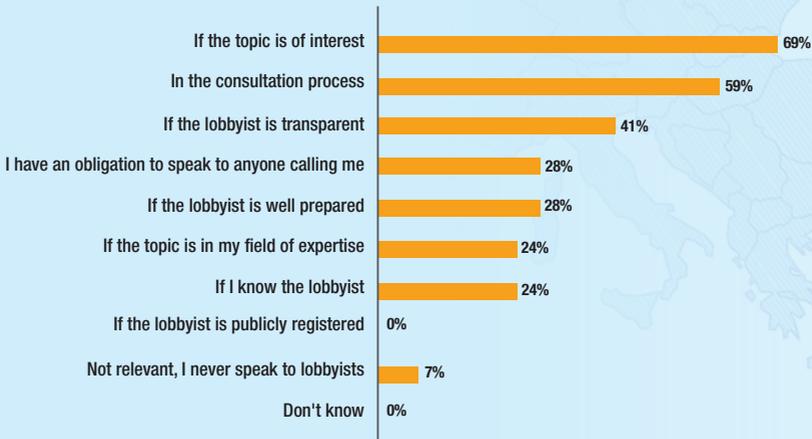
Nearly half of respondents (48%) have never refused a meeting with a lobbyist. For more than two thirds of respondents (69%) it was important that the topic was of interest in order to secure a meeting.

In terms of effectiveness, NGOs scored particularly highly: 79% of respondents viewed them as 'effective' or 'very effective' compared with a European average of 46%. Those NGOs in the defence sector were seen as particularly effective – 55% of respondents saw them as 'effective' or 'very effective' compared with an average of 20% across the EU.

“ Personal meetings are best. Long e-mails are a bad strategy. ”



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



“Openness, not regulation is important. The chances are that this will be bypassed and other avenues will be utilised to exert influence.”

NB. directional data

## Poland

- > Polish respondents place a strong emphasis on a mandatory register: 87% believe that such a register is useful
- > Being transparent (73%), publicly registered (60%) and participating during a consultation process (73%) are key factors in getting a meeting
- > Only 30% of respondents described public affairs consultancies as lobbyists

Transparency is a very important issue in Poland: it is one of the few countries in Europe that has mandatory regulation of lobbying. Compared with 2009, when concerns about the lack of transparency were stronger than anywhere else surveyed (90% of respondents selected this as one of the negative aspects of lobbying), now only 20% cite a lack of transparency as the most negative aspect.

73% of Polish respondents saw transparency as an important factor in deciding whether to meet a lobbyist – one of the highest levels of all the countries surveyed. Half of the policy-makers surveyed think lobbying is sufficiently regulated - almost twice the average rate for those surveyed across Europe. Only 27% expect further regulation in the next three years.

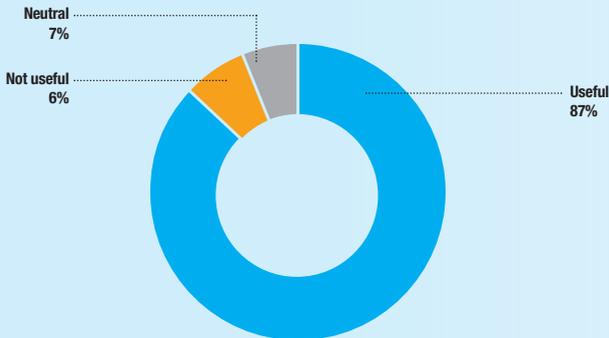
However, concerns about transparency appear to be replaced by other concerns: that the information provided is not neutral (43% - higher than anywhere else surveyed) and that lobbying gives undue weight to elites and the wealthy (30%). However, with regard to the positive aspects of lobbying, respondents clearly identified a role in ensuring the participation of social and economic actors and citizens in the political process (50%) and translating technical and scientific information into relevant information (33%).



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



## How useful do you think a mandatory register for lobbyists would be in your country?



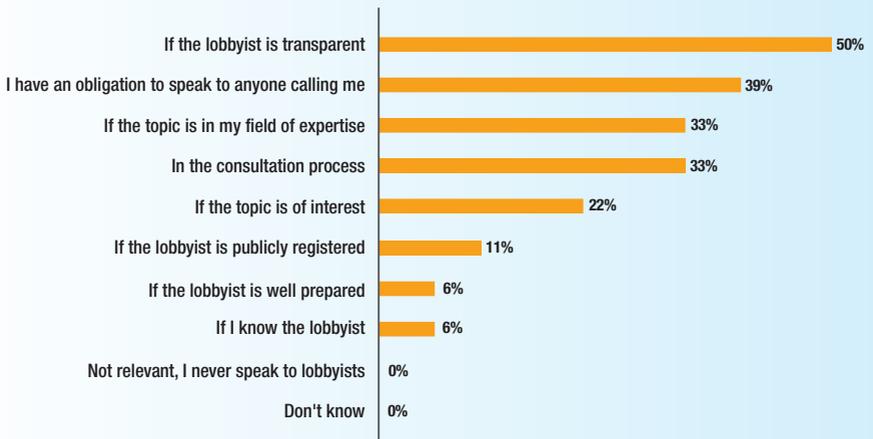
# Portugal

- > Being transparent about the interest represented is the most important factor when deciding whether to meet a lobbyist
- > Only 12% of respondents see public affairs agencies as ‘transparent’ or ‘very transparent’, while only 33% judge them to be effective advocates

The majority of respondents in Portugal (61%) find ensuring the participation of social and economic actors and citizens in the political process to be the most positive aspect of lobbying. 22% of respondents said that their main concern about lobbying was that it gives undue weight in the democratic process to elites and the wealthy, while lack of transparency is identified by 39% as the most negative aspect.

Transparency is the most important factor (cited by half of the respondents) when deciding whether to meet a lobbyist, while knowing the lobbyist is virtually irrelevant according to those surveyed. However, insufficient transparency and failing to understand process and procedure are the most frequent poor practices according to respondents.

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





Trade unions are perceived as the most transparent lobbyists (61% judging them to be ‘transparent’ or ‘very transparent’ while only 12% view public affairs agencies in the same way.

Among the policy-makers surveyed, half report meetings with lobbyists to their hierarchy and 28% disclose information about meetings if asked. All respondents agreed that ethical and transparent lobbying helps policy development but 88% believe that a mandatory register for lobbyists would be useful since they find that lobbying is not sufficiently regulated in Portugal.

Responses indicate that trade associations and professional organisations are perceived as the most effective lobbyists (they are seen as ‘effective’ or ‘very effective’ by 78% and 72% of respondents respectively). ‘Corporate’ lobbyists in the financial services and energy industries are seen as the most effective advocates. Environment and human rights NGOs are thought of as the most effective, while those focusing on consumer issues do not fare as well. Respondents indicate that NGOs frequently base their positions on emotion rather than facts.

Based on our survey, national authorities’ documents and internal meetings are the most helpful sources of information for policy-makers, along with documents from the EU institutions and meetings with industry. Government and scientific websites, along with specialist news media, are the most valuable digital media sources, while the majority of policy-makers in our survey consult company and industry association websites on a daily or weekly basis.

“To me, a correct approach to lobbying means very high quality information about the issue to be discussed. It will be successful if there is mutual trust.”

# Romania

- > Public affairs agencies are seen as the most transparent and effective lobbyists in Romania
- > A lack of transparency is most commonly cited as an example of poor lobbying practice
- > Nearly two thirds of respondents expect new lobbying regulations within three years

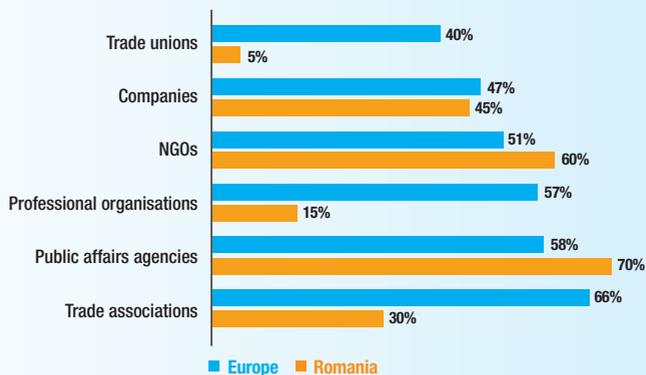
In Romania the variety of groups considered to be 'lobbyists' is rather small. With a score of 70%, public affairs agencies were most often cited as an example of lobbyists, followed by NGOs (60%) and companies (45%).

Compared with the European average, trade associations are perceived as lobbyists less often in Romania than in other European countries, according

to our survey: only 30% see them as lobbyists (compared with a European average of 66%). These groups are also

“ A successful lobbying approach is driven by sincerity, transparency and perseverance. ”

In your experience, which of the following could be considered as matching the description of a lobbyist?





perceived as being less transparent and effective than in other European countries.

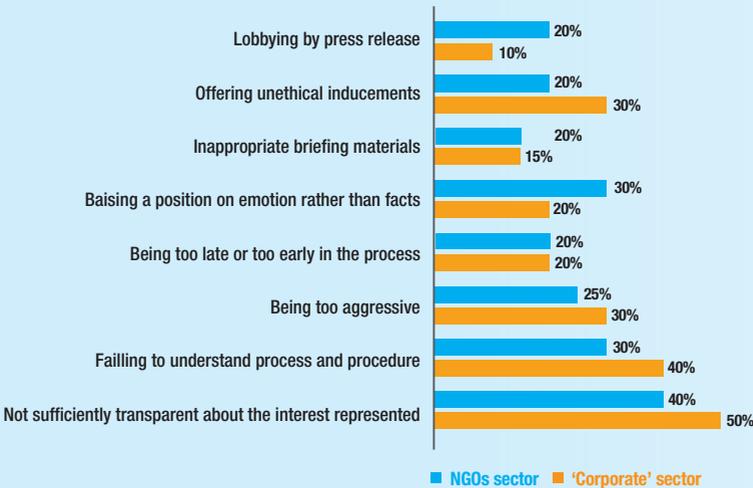
Public affairs agencies have a good reputation according to respondents in Romania. They are rated as most transparent lobbyists (40% seeing them as 'transparent' or 'very transparent') and the most effective (55% seeing them as 'effective' or 'very effective').

The most commonly committed failures by both the 'corporate' sector and NGOs are the lack of transparency (cited by 50% of respondents for industry, 40% for NGOs) and failure to understand the

process (40% for industry, 30% for NGOs). While NGOs also frequently base a position on emotion rather than on fact (30%), the private sector is associated with being too aggressive and offering what are perceived to be unethical inducements (both by 30% of respondents).

Among respondents in Romania only 10% believe that lobbying is sufficiently regulated at a national level (compared with 28% across Europe). However, 65% of respondents are confident there will be further regulations within the next three years (compared with a European average of 38%).

### Poor practice in lobbying by the 'corporate' sector and by NGOs



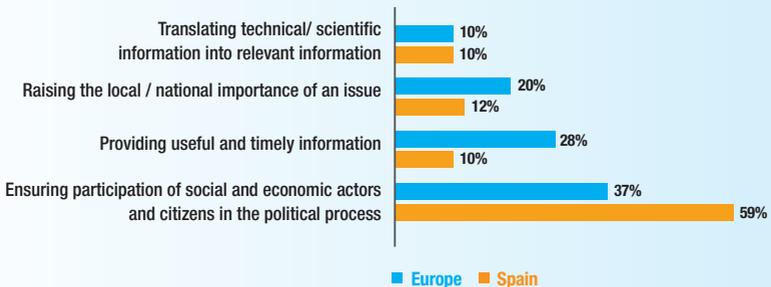
# Spain

- > A lack of transparency and biased information are the main negative aspects of lobbying in Spain
- > 56% of respondents say they are obliged to speak to anyone calling them
- > Energy, healthcare and financial services lobbyists are regarded as the most effective lobbyists in the ‘corporate’ sector; human rights, environment and social affairs advocates are most effective among NGOs

The main criticism of lobbying from respondents in Spain is a lack of transparency (46% cite this as the most negative aspect of lobbying compared with a European average of 26%). Only 5% of respondents in Spain are concerned about lobbying giving an undue weight in the decision-making process to elites and the wealthy (about five times lower than the European average).

The most positive aspect of lobbying, as identified by 59% of respondents in Spain, is that it ensures participation of social and economic actors and citizens in the political process (the European average being 37%). Only 12% cite the opportunity to raise the local or national importance of an issue as the most positive aspect (against a European average of 20%).

## What would you say is the most positive aspect of lobbying?



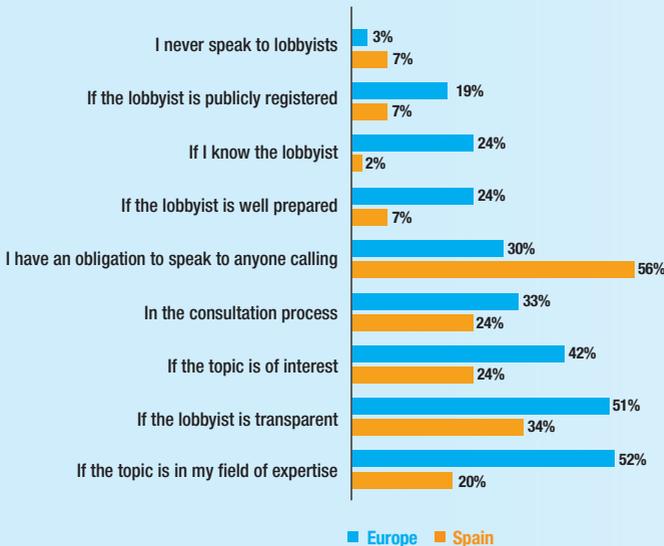
NB. in partnership with Cariotipo MH5



56% of respondents in Spain stated that they have an obligation to speak to anyone calling them, so there are comparatively few respondents who have refused to meet with a lobbyist before (39% compared with a European average of 50%). Nevertheless, when deciding whether to speak to a lobbyist, respondents told us that they appreciate a transparent approach (34%), that contact comes during a consultation process (24%), or that the issue is in their field of interest (24%).

Regarding effectiveness, the data shows a clear gap between the 'corporate' and NGO sectors. While energy (69%), healthcare (61%) and financial services (61%) are identified as the most effective 'corporate' sectors, human rights (47%), environment (46%) and social affairs (37%) advocates score highest on the NGO side.

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



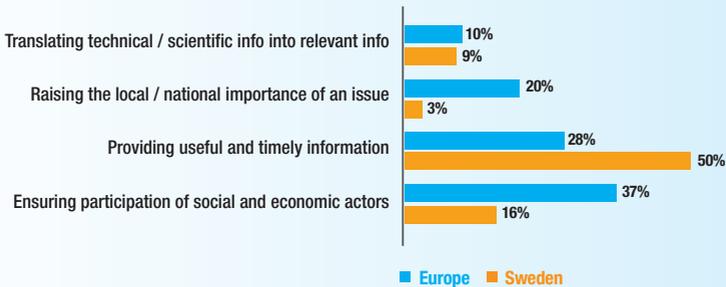
# Sweden

- > 'Corporate' lobbyists are seen as less effective in Sweden than elsewhere in Europe
- > NGOs feature as a frequently-consulted and helpful source of information
- > Facebook is used frequently for work, but is not seen to be particularly useful

The positive aspects of lobbying are ranked rather differently in Sweden to the rest of Europe. Providing useful and timely information is seen by half of the respondents in Sweden as the most

positive aspect of lobbying (50%). Raising the local or national importance of an issue was highlighted as the most important aspect by just 3% of respondents.

## What would you say is the most positive aspect of lobbying?



47% of respondents in Sweden said that 'corporate' energy lobbyists were effective, making it the most effective sector. Healthcare and defence (43%) follow with 'corporate' financial services lobbying being perceived as effective

by just 15% of respondents, compared with a European average of 53%. Generally, 'corporate' lobbyists are seen as less effective in Sweden than in Europe as a whole.



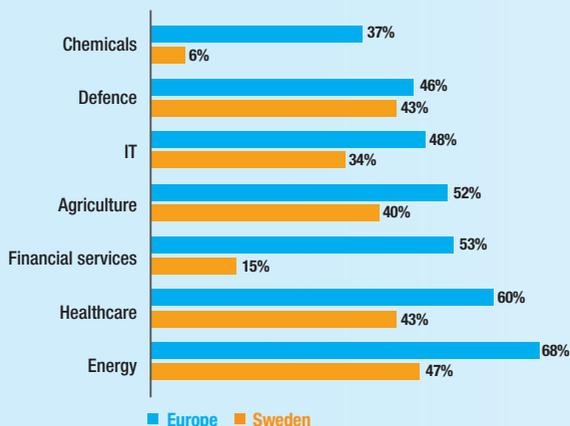
Among NGOs, those lobbyists active in the environment sector are viewed as effective by 50% of the respondents, followed by human rights (47%) and agriculture (44%).

The survey suggests that NGOs in Sweden are a relatively influential source of information. To make informed decisions at work, Swedish respondents ranked internal meetings (66%) and NGO meetings (66%) as most helpful. In terms of media sources, 44% of the respondents said that NGO websites are helpful compared with a European average of 30%.

Remarkably, the most frequently consulted digital source for work-related issues in Sweden are NGO websites (65%). This is the highest score in Europe (the European average being 37%). According to the respondents, Facebook is also frequently consulted for work more in Sweden than in any other European country (50% using it daily or at least once a week for work, compared with a European average of 31%). However, the social network is not seen as a useful source of information (only 9% see it as 'helpful' or 'very helpful').

### How effective would you say private company and industry association lobbying efforts are in each sector?

Results showing responses for 'effective' and 'very effective'



# United Kingdom

“ [A mandatory register] may help reduce lobbyists’ unethical behaviour because there would be a sense that someone is watching. ”

More than half of all respondents in the UK (53%) consider raising the local / national importance of an issue as the most positive aspect of lobbying, compared with a European average of 20%.

93% of all respondents in the UK either ‘agree’ or ‘strongly agree’ that ethical and transparent lobbying helps policy development, and they also view many groups - trade associations (84%), companies (83%), trade unions (80%) and NGOs (76%) - as being ‘transparent’ or ‘very transparent’. In particular, embassies (83%) score far higher when compared with the European average (52%) and public affairs agencies (60%) score more than double the European average on transparency.

Respondents in the UK take a broad view as to who should be considered a ‘lobbyist’. 73% consider NGOs to be lobbyists, and 77% count trade unions. Embassies are deemed to be lobbyists by 47% of respondents (well above the EU average of 22%). However, only 40% believe that companies fall into this category.

73% of respondents in the UK believe that lobbying is regulated through a voluntary register/ code of conduct. However, only 33% consider lobbying to be sufficiently regulated. 63% of all respondents believe that lobbying will be further regulated in the next three years.

In general, respondents rate the effectiveness of lobbyists very highly: 84% saw trade associations’ lobbying efforts as being ‘effective’ or ‘very effective’; for public affairs agencies the figure was 77%. Professional organisations, NGOs and embassies (each at 70%) also fared well.

87% consider the healthcare sector to be the most effective ‘corporate’ sector, followed by agriculture (83%), defence (76%), energy (76%), and financial services (70%). At 63%, the retail sector scores notably higher than the European average (24%).

In contrast to the rest of Europe the overall majority of respondents in the UK consider NGOs active on human rights to be particularly effective (70% in the UK compared to 49% across the EU) – even more effective than environment NGOs (66%), which score highest across Europe.

43% of respondents in the UK cite offering what are perceived to be unethical inducements as the most frequently-committed poor practice amongst private sector companies and associations whilst 77% of respondents feel that NGOs’ biggest failing is basing their positions on emotion rather than facts.

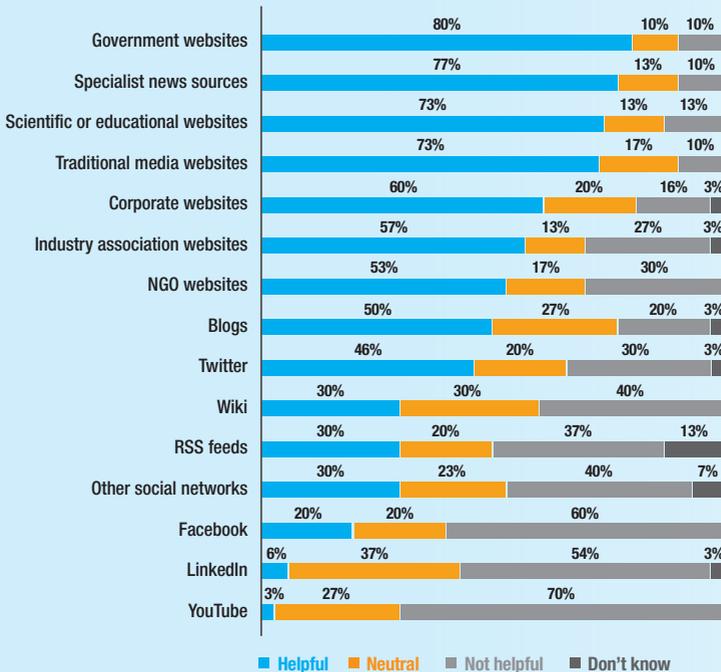


Respondents in the UK generally rate most media sources as being helpful – well above the European average. Government websites score highest (80% saying they are ‘helpful’ or ‘very helpful’). 77% cite specialist news as ‘helpful’ or ‘very helpful’; 73% mention scientific and educational websites and the same proportion highlight traditional media websites. Blogs (50%) and Twitter (46%) score well above the respective European averages of 23% and

12% and more than double the European average consult both digital sources either daily or at least once a week for work purposes.

“[To be more helpful] be ethical, polite, to the point, and don’t take too much time.”

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



# ANNEX: RAW DATA

All data is represented in percentages (%)

## What would you say is the most positive aspect of lobbying?

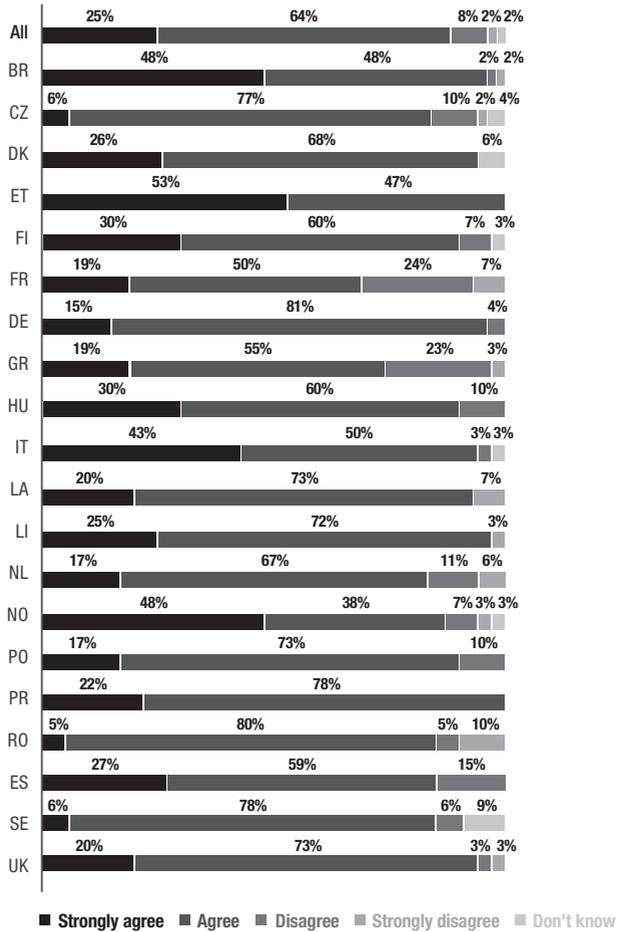
	All	BR	CZ	DK	ET	FI	FR	DE	GR	HU	IT	LA	LI	NL	NO	PL	PT	RO	ES	SE	UK
Ensuring participation of social and economic actors and citizens in the political process	37	39	38	28	60	13	38	30	32	40	40	53	62	6	28	50	61	40	59	16	23
Providing useful and timely information	28	25	40	32	20	33	24	37	19	30	17	27	19	61	55	13	22	10	10	50	20
Raising the local / national importance of an issue	20	20	6	28	20	47	21	19	26	20	13	7	12	28	14	3	17	25	12	3	53
Translating technical/scientific information into relevant information	10	11	10	4	0	3	10	15	23	5	30	13	3	0	0	33	0	0	10	9	3
Other	3	5	2	4	0	0	2	0	0	5	0	0	3	0	0	0	0	25	2	12	0
Don't know	3	0	4	4	0	3	5	0	0	0	0	0	0	6	3	0	0	0	7	9	0

## What would you say is the most negative aspect of lobbying?

	All	BR	CZ	DK	ET	FI	FR	DE	GR	HU	IT	LA	LI	NL	NO	PL	PT	RO	ES	SE	UK
Interest not clearly outlined/lack of transparency	26	30	19	23	60	40	26	26	13	10	23	33	25	39	10	20	39	5	46	25	20
Gives undue weight in the process to elites and wealthy	24	16	19	17	27	27	10	30	23	40	3	33	41	17	55	30	28	40	5	34	17
Not providing neutral information	23	34	19	26	7	10	26	26	19	30	30	13	25	33	10	43	11	10	22	19	27
An undue influence of the democratic process	14	7	33	11	7	10	24	11	26	15	17	7	9	11	0	7	22	10	12	3	20
Too many contacts / an annoyance	7	11	2	11	0	10	12	7	6	5	13	13	0	0	10	0	0	5	10	6	13
Other	5	2	8	11	0	3	2	0	10	0	10	0	0	0	7	0	0	30	2	6	3
Don't know	1	0	0	2	0	0	0	0	3	0	3	0	0	0	7	0	0	0	2	6	0

.....

## To what extent do you agree that ethical and transparent lobbying helps policy development?



.....

### In your experience which of the following could be considered as matching the description of a 'lobbyist'?

	All	BR	CZ	DK	ET	FI	FR	DE	GR	HU	IT	LA	LI	NL	NO	PL	PT	RO	ES	SE	UK
Trade associations	66	86	27	72	100	97	81	37	48	60	70	93	69	94	55	67	61	30	61	59	83
PA agencies	58	66	54	26	87	77	93	56	68	40	57	60	44	89	34	30	61	70	37	56	87
Professional orgs	57	73	52	49	87	67	83	30	58	45	27	87	44	83	66	50	72	15	61	47	57
NGOs	51	68	25	38	100	93	64	26	35	30	30	80	62	78	52	57	39	60	39	31	73
Companies	47	70	35	34	80	63	76	33	16	60	50	40	34	61	52	40	50	45	49	22	40
Trade unions	40	73	15	32	67	97	60	15	42	5	10	53	12	50	38	37	50	5	39	22	77
Think tanks	30	45	17	28	87	40	57	11	32	0	10	20	28	56	0	33	22	30	39	31	27
Law firms	27	39	17	9	53	37	69	11	16	20	23	40	44	22	3	23	67	20	27	3	23
Embassies	22	36	6	6	60	50	40	4	23	20	10	53	31	17	3	10	22	10	15	12	47
Academics	15	9	15	17	47	27	40	4	6	5	3	13	16	11	7	17	17	5	15	12	17
Citizens	15	18	4	15	53	30	26	0	6	15	10	20	9	11	17	17	11	0	12	12	30
Journalists	14	9	12	6	27	27	36	0	19	0	3	20	19	22	3	17	33	20	12	6	3
Others	4	5	6	2	0	0	17	7	3	5	3	0	6	0	10	0	0	5	0	0	0

.....

### On a scale of 1 to 5, where 1 is 'I never know who they represent' and 5 is 'always know who they represent', to what extent would you say each of the following is transparent in lobbying?

	All	BR	CZ	DK	ET	FI	FR	DE	GR	HU	IT	LA	LI	NL	NO	PL	PT	RO	ES	SE	UK
Trade associations	65	70	37	75	66	80	73	60	68	60	67	80	40	55	87	73	44	10	53	85	84
Professional orgs	60	70	62	68	87	33	80	19	54	65	63	86	37	50	97	63	44	40	54	50	70
Companies	57	71	50	66	67	66	62	63	48	50	74	20	28	77	68	46	44	20	41	82	83
Trade unions	56	66	36	77	40	63	73	48	52	50	40	46	19	72	90	53	61	30	41	72	80
NGOs	55	59	42	64	47	70	61	45	29	50	46	67	43	55	96	47	44	25	34	75	76
Embassies	52	71	38	45	60	63	57	56	68	45	50	40	53	61	52	30	28	30	40	59	83
Citizens	33	34	32	43	46	43	34	51	32	25	20	0	15	17	83	23	23	5	9	34	63
Academics	32	21	37	35	40	27	27	41	29	45	3	33	31	33	59	10	44	15	34	44	33
PA agencies	27	36	10	21	27	24	31	33	29	35	30	14	16	23	45	13	12	40	22	18	60
Think tanks	27	25	17	28	33	10	35	34	42	40	17	7	15	28	55	13	11	20	22	50	47
Law firms	23	27	18	39	0	13	29	11	23	20	23	7	6	11	35	17	6	10	32	31	44
Journalists	16	21	4	23	20	10	14	22	3	10	14	0	6	11	24	6	22	20	17	40	27
Others	2	2	0	2	14	0	2	0	0	0	0	0	0	0	20	0	0	0	2	6	0

Showing 4-5 'very transparent'

.....  
**Do you think that lobbying is sufficiently regulated in your country?**

	All	BR	CZ	DK	ET	FI	FR	DE	GR	HU	IT	LA	LI	NL	NO	PL	PT	RO	ES	SE	UK
Yes	28	48	6	57	27	47	31	44	3	0	0	27	19	28	59	50	0	10	0	38	33
No	56	34	88	34	53	50	67	30	71	75	87	67	47	22	24	37	100	75	93	25	53
Don't know	16	18	6	9	20	3	2	26	26	25	13	7	34	50	17	13	0	15	7	38	13

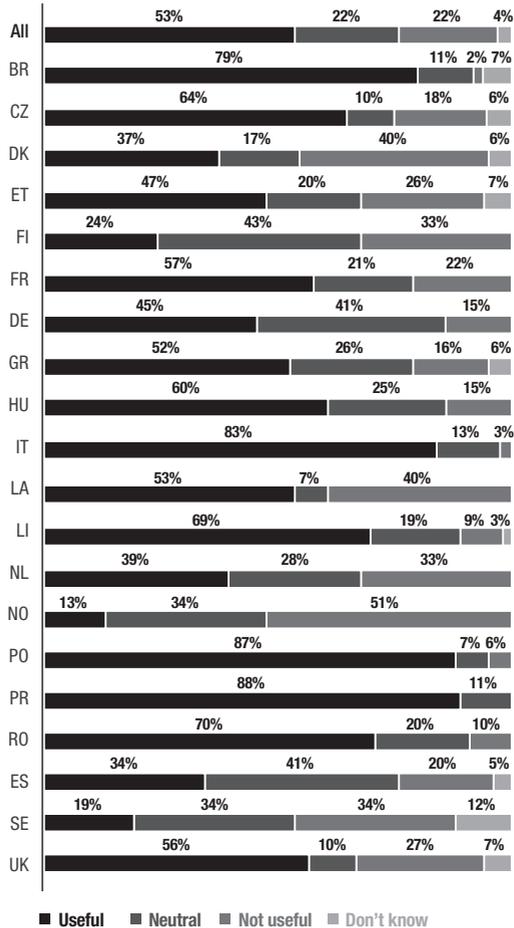
.....  
**Is lobbying in your country today...?**

	All	BR	CZ	DK	ET	FI	FR	DE	GR	HU	IT	LA	LI	NL	NO	PL	PT	RO	ES	SE	UK
Not regulated	49	7	71	55	67	47	40	7	61	50	67	100	28	17	62	7	83	70	88	75	7
Voluntary register	25	45	19	17	33	53	38	67	3	15	10	0	16	33	24	10	17	5	5	3	73
Mandatory register	11	27	4	2	0	0	5	15	6	25	0	0	38	0	0	80	0	5	0	0	7
Don't know	15	20	6	26	0	0	17	11	29	10	23	0	19	50	14	3	0	20	7	22	13

.....  
**Do you think that lobbying will or will not be further regulated in your country in the next three years?**

	All	BR	CZ	DK	ET	FI	FR	DE	GR	HU	IT	LA	LI	NL	NO	PL	PT	RO	ES	SE	UK
Yes	38	45	15	45	67	47	43	52	29	25	30	67	41	39	31	27	11	65	44	12	63
No	35	18	44	30	20	47	50	26	35	20	30	27	22	33	48	60	44	15	34	50	27
Don't know	27	36	42	26	13	7	7	22	35	55	40	7	38	28	21	13	44	20	22	38	10

How useful do you think that a mandatory register for lobbyists would be in your country?



## Thinking about your meetings with lobbyists, which of the following apply?

	All	BR	CZ	DK	ET	FI	FR	DE	GR	HU	IT	LA	LI	NL	NO	PL	PT	RO	ES	SE	UK
I report my meetings to hierarchy	43	89	35	47	40	60	50	30	26	65	47	20	19	56	52	43	50	25	44	3	37
If asked, I disclose information about my meetings	37	27	46	28	87	43	43	56	26	30	30	53	25	39	52	53	28	10	22	41	33
I sometimes mention my meetings on my website	18	9	8	19	53	0	14	19	6	0	7	60	34	28	24	20	17	0	15	53	20
I tend not to disclose information about my meetings	12	9	10	6	27	7	26	22	16	5	13	13	0	6	24	0	11	10	7	19	13
I systematically list my meetings on my website	7	14	4	4	0	3	0	0	3	0	3	7	31	0	0	7	6	0	5	9	23
I never disclose information about my meetings	4	0	0	2	0	0	19	11	13	0	3	0	3	0	0	0	0	0	5	3	7

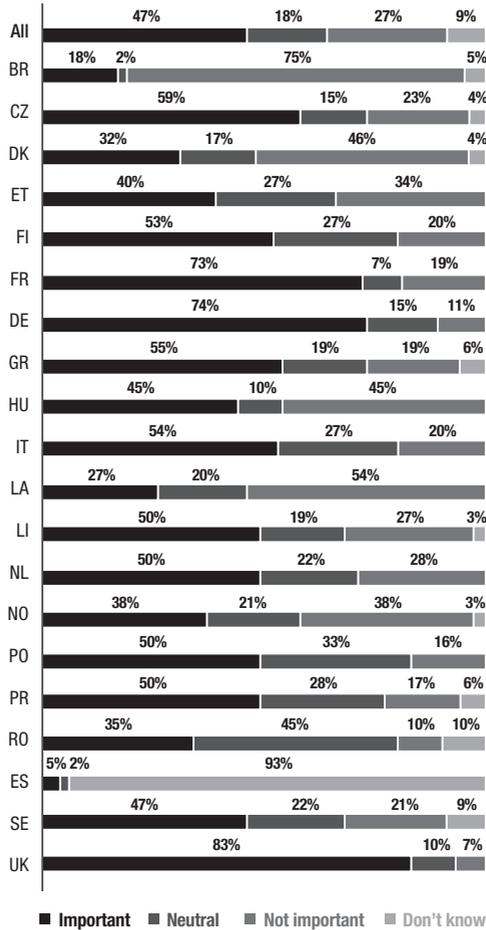
## Have you ever refused a meeting with a lobbyist?

	All	BR	CZ	DK	ET	FI	FR	DE	GR	HU	IT	LA	LI	NL	NO	PL	PT	RO	ES	SE	UK
Yes	50	59	52	64	67	60	69	70	32	50	50	53	19	56	45	50	33	5	39	59	53
No	34	34	23	32	27	37	31	11	32	35	40	47	6	39	48	40	33	55	54	31	47
Don't know	15	7	25	4	7	3	0	19	35	15	10	0	75	6	7	10	33	40	7	9	0

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

	All	BR	CZ	DK	ET	FI	FR	DE	GR	HU	IT	LA	LI	NL	NO	PL	PT	RO	ES	SE	UK
If the topic is my field of expertise	52	77	27	62	67	60	64	70	35	45	60	53	44	56	24	70	33	45	20	62	67
If the lobbyist is transparent	51	64	50	34	93	70	52	56	65	50	50	20	44	67	41	73	50	30	34	44	53
If the topic is of interest	42	55	33	23	80	70	55	56	35	10	27	27	22	39	69	47	22	30	24	50	67
In the consultation process	33	34	17	38	73	50	52	15	19	10	30	13	3	61	59	73	33	35	24	6	40
I have an obligation to speak to anyone calling me	30	18	40	32	53	20	21	4	26	45	7	60	56	28	28	33	39	35	56	9	7
If the lobbyist is well prepared	24	27	10	26	87	53	29	41	10	20	27	0	12	17	28	30	6	15	7	16	33
If I know the lobbyist	24	27	8	30	67	37	40	33	23	20	17	20	16	28	24	27	6	0	2	25	33
If the lobbyist is publicly registered	19	57	8	4	53	20	17	7	16	20	27	0	19	0	0	60	11	15	7	12	17
I never speak to lobbyists	3	0	8	2	0	0	0	4	6	0	0	7	0	6	7	0	0	0	7	0	3

How important is it that you are approached in your own language on an issue of national interest?



On a scale of 1 to 5, where 1 is 'not at all effective' and 5 is 'very effective', how would you rate the effectiveness of lobbying of the following organisations?

	All	BR	CZ	DK	ET	FI	FR	DE	GR	HU	IT	LA	LI	NL	NO	PL	PT	RO	ES	SE	UK
Trade associations	62	62	45	74	87	83	69	51	39	60	80	80	53	77	58	53	78	30	49	59	84
Professional orgs	51	59	52	57	54	37	50	48	39	40	40	66	34	56	68	37	72	30	63	44	70
NGOs	46	57	29	42	33	37	47	78	19	30	60	40	28	55	79	37	44	35	42	44	70
Companies	44	64	52	30	54	50	39	52	32	40	46	20	47	45	62	23	39	40	35	43	63
Trade unions	44	48	42	44	13	64	45	51	39	35	36	20	22	56	58	37	56	25	49	50	57
PA agencies	42	47	42	23	47	43	36	71	42	55	53	27	37	45	28	10	33	55	32	43	77
Embassies	34	50	25	27	34	30	26	37	61	25	43	40	31	34	17	10	39	40	39	12	70
Journalists	32	20	44	17	40	27	19	51	32	30	20	20	34	23	13	33	50	45	44	19	60
Think tanks	30	36	25	32	27	10	24	52	29	20	33	27	25	56	27	10	17	35	34	34	60
Law firms	29	31	42	27	27	20	19	44	23	25	27	20	25	6	14	16	45	45	35	9	64
Academics	24	29	18	23	20	13	16	29	25	10	30	27	31	34	38	10	28	10	27	19	40
Citizens	21	25	14	11	26	10	14	26	16	15	37	13	22	28	42	20	22	10	9	19	43

Showing 4-5 'effective'

On a scale of 1 to 5, where 1 is 'not at all' and 5 is 'very', how effective would you say 'corporate' lobbying efforts are in each sector?

	All	BR	CZ	DK	ET	FI	FR	DE	GR	HU	IT	LA	LI	NL	NO	PL	PT	RO	ES	SE	UK
Energy	68	68	77	54	94	80	79	88	64	50	90	87	65	56	69	57	39	60	69	47	76
Healthcare	60	64	71	51	54	37	76	93	64	50	80	60	69	45	52	43	28	45	61	43	87
Financial services	53	52	56	32	86	54	57	70	42	60	67	94	47	34	52	53	50	45	61	15	70
Agriculture	52	75	35	49	47	57	66	82	36	35	43	87	57	55	58	36	17	45	44	40	83
IT / telecoms	48	57	71	27	60	24	57	55	52	45	60	60	50	28	41	37	39	30	54	34	63
Defence	46	48	63	13	33	37	62	60	58	30	57	27	15	44	59	20	28	50	54	43	76
Trade	42	52	58	32	40	73	33	26	19	45	40	46	41	55	45	13	23	60	47	22	63
Transport	39	57	52	17	33	26	35	52	13	35	43	54	40	39	52	13	28	45	47	28	66
Chemicals	37	66	16	19	20	53	41	56	33	55	63	34	28	23	31	23	22	25	47	6	60
Mining	36	43	56	11	40	40	29	44	45	20	36	0	31	28	27	30	28	65	44	25	53
Sports	31	28	56	17	40	30	16	30	29	25	30	33	44	22	41	16	22	35	29	22	50
Retail	24	36	8	17	7	33	14	30	19	20	23	27	25	28	34	13	28	30	15	15	63
Consumer goods	23	41	23	6	0	26	22	26	38	35	20	0	28	34	17	10	12	20	22	3	57

Showing 4-5 'effective'

On a scale of 1 to 5, where 1 is 'not at all' and 5 is 'very', how effective would you say NGO lobbying efforts are in each sector?

	All	BR	CZ	DK	ET	FI	FR	DE	GR	HU	IT	LA	LI	NL	NO	PL	PT	RO	ES	SE	UK
Environment	52	68	50	52	60	63	64	55	55	40	40	47	66	33	44	50	39	35	46	50	66
Human rights	49	66	33	34	47	50	69	52	45	40	47	47	60	39	48	40	39	45	47	47	70
Energy	38	36	27	25	53	36	50	78	32	10	47	47	24	39	62	26	33	20	29	31	57
Healthcare	37	44	25	23	60	26	26	55	32	20	37	60	50	50	41	30	39	25	31	43	57
Agriculture	37	54	10	39	47	40	36	44	22	25	40	80	43	33	55	13	28	30	19	44	63
Social affairs	33	48	25	19	47	23	24	52	42	30	24	27	31	28	42	10	22	35	37	40	63
Financial services	25	19	6	15	47	7	34	34	25	15	30	73	22	33	45	20	28	10	27	15	40
Mining	24	37	14	10	13	37	33	30	36	5	23	0	18	28	24	17	17	45	17	15	50
Transport	23	27	21	15	20	17	12	37	9	15	30	33	28	28	41	10	6	20	9	25	50
Chemicals	22	38	12	13	0	16	19	49	25	20	34	14	6	12	24	13	17	10	27	9	44
IT / telecoms	22	23	14	17	40	13	21	15	25	15	27	53	18	12	31	20	28	10	19	19	27
Sports	21	16	27	17	40	17	12	19	20	30	13	40	37	22	38	10	23	25	12	21	23
Trade	20	28	6	11	13	13	19	7	12	15	30	40	12	39	34	10	23	15	14	15	50
Defence	20	23	16	9	7	7	14	37	29	5	23	0	9	17	55	10	12	20	9	22	50
Consumer goods	15	34	6	6	7	13	9	19	25	25	20	7	12	28	21	13	6	10	15	12	13
Retail	13	14	6	17	7	6	7	11	19	30	20	34	6	22	24	10	12	15	5	6	13

Showing 4-5 'effective'

Thinking about poor practice in lobbying, which of the following would you say are the most frequently committed by the 'corporate' sector?

	All	BR	CZ	DK	ET	FI	FR	DE	GR	HU	IT	LA	LI	NL	NO	PL	PT	RO	ES	SE	UK
Not sufficiently transparent about the interest represented	48	55	71	30	27	40	60	48	61	55	57	27	59	28	17	57	50	50	54	41	30
Failing to understand process and procedure	37	43	10	49	53	27	33	52	39	20	50	60	9	50	55	43	39	40	27	34	40
Being too aggressive	35	48	52	21	27	40	36	37	29	15	17	40	56	50	31	20	17	30	41	38	40
Being too early or too late in the process	32	34	15	40	67	33	24	22	29	35	53	60	9	33	48	43	33	20	27	34	23
Basing a position on emotion rather than facts	27	25	27	21	60	43	21	30	23	40	10	33	12	44	21	57	17	20	29	22	17
Inappropriate briefing materials	25	30	19	32	7	27	29	33	23	35	33	27	31	11	52	13	22	15	12	16	30
Offering unethical inducements	25	14	38	2	7	3	45	33	42	5	20	0	56	17	0	43	22	30	27	12	43
Lobbying by press release	20	11	10	17	53	40	14	22	19	15	10	13	44	17	14	23	17	10	24	16	30
Other	2	5	0	0	0	3	2	0	0	0	0	7	0	0	10	0	0	0	0	3	3

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

	All	BR	CZ	DK	ET	FI	FR	DE	GR	HU	IT	LA	LI	NL	NO	PL	PT	RO	ES	SE	UK
Basing a position on emotion rather than facts	56	75	73	49	67	23	57	48	39	65	40	67	62	61	41	73	67	30	68	31	77
Failing to understand process and procedure	39	34	38	38	47	73	31	11	29	50	33	47	56	17	34	43	33	30	34	53	53
Being too early or too late in the process	37	50	35	36	80	27	31	19	26	45	53	47	41	17	59	40	17	20	27	34	50
Being too aggressive	28	34	35	19	27	10	40	59	26	10	30	27	25	22	17	23	28	25	32	28	20
Not sufficiently transparent about the interest represented	23	18	19	4	20	37	31	37	32	45	23	20	19	11	10	33	28	40	24	16	10
Lobbying by press release	20	23	15	6	40	33	19	19	16	25	30	20	28	22	10	27	17	20	17	12	17
Inappropriate briefing materials	19	14	25	15	13	33	26	30	26	20	23	20	25	6	38	13	11	15	5	9	10
Offering unethical inducements	7	0	8	4	7	10	12	26	6	0	3	0	9	0	3	13	0	20	0	6	10
Other	2	2	0	2	0	0	2	0	10	0	0	0	3	0	10	0	0	0	2	3	3

On a scale of 1 to 5, where 1 is 'not at all helpful' and 5 is 'very helpful', how helpful would you say each of the following are in providing you with what you need to make informed decisions in your work?

	All	BR	CZ	DK	ET	FI	FR	DE	GR	HU	IT	LA	LI	NL	NO	PL	PT	RO	ES	SE	UK
Internal meetings	70	84	75	72	80	77	64	70	58	75	67	66	53	61	79	73	66	60	64	66	84
National authorities' documents	70	78	58	75	73	90	64	85	61	75	73	66	71	56	79	63	72	60	57	65	80
Industry meetings	62	80	52	38	80	53	40	70	61	60	80	80	81	72	62	43	61	60	66	47	73
Written briefing material	59	75	35	30	46	67	62	74	52	65	77	40	62	61	82	64	55	45	58	46	80
Site visits	54	57	41	34	74	63	40	77	58	40	53	53	66	72	76	44	61	55	34	62	70
NGO meetings	52	68	48	36	73	50	31	63	29	40	60	67	40	61	79	67	39	50	40	66	63
EU Institutions	52	87	33	43	34	43	33	75	64	60	73	67	56	55	24	67	61	60	34	40	50
Public consultations	51	65	44	51	47	47	45	51	32	55	40	53	50	55	62	67	56	60	39	25	80
Web search	47	50	31	37	33	20	50	45	80	50	43	27	59	55	76	43	39	45	37	50	66
Conferences	44	68	44	17	34	33	29	59	65	20	57	40	34	39	42	60	50	45	31	50	66
Personal networks	42	41	46	51	60	10	40	48	52	60	46	67	31	56	38	33	17	25	32	43	70
Traditional media	36	45	29	40	13	33	38	51	29	15	33	27	16	56	52	33	45	45	22	40	67
Traditional media websites	36	39	17	27	7	43	22	44	62	15	37	27	31	50	49	30	55	35	22	47	66
Social media	22	32	8	6	27	27	17	26	42	25	24	20	9	33	20	10	22	25	19	31	50

Showing 4-5 'helpful'

On a scale of 1 to 5, where 1 is 'not at all helpful' and 5 is 'very helpful', how helpful would you say each of the media sources are in providing you with what you need to make informed decisions in your work?

	All	BR	CZ	DK	ET	FI	FR	DE	GR	HU	IT	LA	LI	NL	NO	PL	PT	RO	ES	SE	UK
Specialist news	58	75	35	38	47	40	55	59	65	55	70	86	72	72	44	60	61	75	61	44	77
Government websites	50	60	27	43	27	64	45	59	46	40	46	46	31	56	62	60	72	45	49	66	80
Scientific / educational websites	46	54	35	25	40	23	24	52	68	65	37	60	56	34	44	47	78	35	51	54	73
Traditional media websites	39	39	18	36	27	40	26	26	58	45	33	27	25	61	45	30	50	55	49	37	73
Industry association websites	31	53	12	26	7	23	14	52	45	20	30	27	16	34	42	33	39	25	36	19	57
NGO websites	30	41	19	19	27	17	19	48	29	20	27	20	12	23	49	40	39	35	25	44	53
Corporate websites	29	43	19	11	14	27	21	37	51	30	26	7	9	33	27	13	44	35	37	28	60
Blogs	23	23	14	2	20	7	7	37	45	55	30	33	31	28	6	14	17	15	41	12	50
Wikipedia	22	27	18	6	13	10	35	15	45	45	7	34	21	17	28	20	11	20	10	28	30
Twitter	12	16	4	2	7	3	15	4	26	10	7	26	0	22	10	0	0	5	20	12	46
Facebook	9	7	8	4	0	7	17	4	22	15	7	0	3	0	17	3	0	15	7	9	20
RSS feeds	9	9	6	2	0	3	4	15	10	15	3	7	9	11	0	0	0	5	14	22	30
YouTube	7	12	4	0	13	3	7	0	26	10	3	20	0	11	3	0	6	10	7	6	3
LinkedIn	7	5	4	2	0	0	7	0	32	10	13	13	0	11	7	3	0	10	7	3	6
Other social networks	7	14	4	0	0	0	2	0	19	10	3	0	0	17	6	3	0	10	2	12	30

Showing 4-5 'helpful'

How frequently do you consult the following social media / digital sources for issues related to your work?

	All	BR	CZ	DK	ET	FI	FR	DE	GR	HU	IT	LA	LI	NL	NO	PL	PT	RO	ES	SE	UK
Company websites	43	43	35	26	40	46	28	59	51	45	46	20	40	39	27	33	67	50	61	56	60
Industry association or federation websites	41	48	21	40	34	27	19	67	48	55	50	34	50	17	24	46	73	40	29	62	60
Wikipedia	38	45	29	17	40	47	57	34	55	65	37	27	24	11	24	47	28	35	42	38	50
NGO websites	37	32	21	19	33	26	24	56	29	50	47	20	40	6	35	36	50	55	41	65	53
Blogs	32	32	17	20	60	30	31	30	68	60	40	20	38	17	13	13	28	15	34	38	60
Facebook	31	16	8	27	46	24	34	30	45	45	44	40	21	34	24	30	22	35	29	50	47
Twitter	27	28	0	10	34	30	33	18	42	15	46	73	22	39	13	13	6	10	42	28	63
YouTube	21	2	6	13	34	24	29	7	42	35	47	26	21	22	0	20	17	25	34	15	7
LinkedIn	18	11	4	19	14	17	17	19	32	10	40	27	22	28	7	10	6	35	17	12	26
Other	9	9	0	22	0	0	7	7	16	5	6	0	0	0	17	0	17	5	4	38	10

Showing 'daily' and 'at least once a week'

.....

## In which language do you consult the following digital sources of information?

	All	BR	CZ	DK	ET	FI	FR	DE	GR	HU	IT	LA	LI	NL	NO	PL	PT	RO	ES	SE	UK
In my own language exclusively	18	0	40	2	0	7	36	30	10	35	20	0	6	22	28	17	6	0	32	19	30
In my own language and in English	45	20	35	74	27	63	43	67	74	45	30	7	50	39	41	53	50	75	34	53	0
In my own language, in English and in another language	30	48	25	19	73	30	19	4	16	15	50	93	44	33	24	27	44	25	34	25	0
In English exclusively	3	23	0	0	0	0	2	0	0	5	0	0	0	0	3	0	0	0	0	0	23
My own language is English and I would consult these sources in English	3	9	0	2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	47
Don't know	1	0	0	2	0	0	0	0	0	0	0	0	0	6	3	3	0	0	0	3	0

# LEADING EU- AND EMEA-WIDE PUBLIC AFFAIRS CAMPAIGNS



## Helping you make the right moves

Inform. Monitor. Measure. **Succeed.**

Government Relations | Advocacy Advertising  
Digital Campaigning | Media Relations | Research Opinion and Monitoring  
Interest Mobilisation and Coalition Building | Election Campaigning



**Burson•Marsteller**

Europe, Middle East & Africa

Robert Mack, Chairman, EMEA Public Affairs | +32 2 7436651 | robert.mack@bm.com | www.burson-marsteller.eu





## ABOUT



### Burson•Marsteller

Burson-Marsteller, established in 1953, is a leading global public relations and communications firm. It provides clients with strategic thinking and programme execution across a full range of public relations, public affairs, reputation and crisis management, advertising and digital strategies. Burson-Marsteller has 74 offices and 85 affiliate offices, operating in 110 countries across six continents. Burson-Marsteller is a unit of WPP, the world's leading communications services network.

**More information is available at**  
[www.bm.com](http://www.bm.com)



**Penn, Schoen & Berland**  
Associates

Penn, Schoen and Berland is a global research-based consultancy that specialises in messaging and communications strategies for blue-chip political and corporate clients. We have more than 30 years of experience in leveraging unique insights about consumer opinion to provide clients with a competitive advantage – what we call Winning Knowledge™. PSB executes polling and message testing services for Fortune 100 corporations and has helped elect more than 30 presidents and prime ministers around the world.

**More information is available at**  
[www.psbresearch.com](http://www.psbresearch.com)

# PARTICIPATING EUROPEAN OFFICES & AFFILIATES

Edition • 2013

## BM OFFICES

### Brussels

Burson-Marsteller  
37 Square de Meeüs  
1000 Brussels  
+32 2 743 66 11  
www.burson-marsteller.be

### Denmark

Burson-Marsteller  
Kronprinsessegade 54 , 4  
1306 Copenhagen K  
+45 3332 7878  
www.burson-marsteller.dk

### Finland

Pohjoisranta Burson-Marsteller  
Kalevankatu 20  
00101 Helsinki  
+358 10 424 5900  
www.pohjoisranta.fi

### France

Burson-Marsteller i&e  
32 Rue de Trévise  
75009 Paris  
+ 33 1 56 03 12 12  
www.burson-marsteller.fr

### Germany

Burson-Marsteller  
Hanauer Landstraße 126 – 128  
60314 Frankfurt am Main  
+49 69 2 38 09-0

Lennéstraße 1  
10785 Berlin  
+49 30 40 81 94 5-50  
www.burson-marsteller.de

### Italy

Burson-Marsteller  
Via Tortona 37  
20144 Milano  
+39 02 721431

Via Gregoriana 54  
00187 Rome  
+39 06 688 9631  
www.bursonmarsteller.it

### Netherlands

Burson-Marsteller  
Alexanderveld 9  
2585 DB Den Haag  
+31 70 302 1100  
www.burson-marsteller.nl

### Norway

Burson-Marsteller  
Kirkegata 17  
0153 Oslo  
+47 23 164 500  
www.burson-marsteller.no

### Spain

Burson-Marsteller  
Av. de Burgos 21, 7a pl  
Complejo Triada Torre C  
28036 Madrid  
+34 91 384 6700

Avda. Diagonal 545, 4-1  
Edificio L'illa  
08029 Barcelona  
+34 93 201 1028  
www.bursonmarsteller.es

### Sweden

Burson-Marsteller  
Mäster Samuelsgatan 56  
101 20 Stockholm  
+46 8 440 1200  
www.burson-marsteller.se

### UK

Burson-Marsteller  
Level 6 South  
Central Saint Giles  
1 St Giles High Street  
WC2H 8AG London  
+44 207 831 6262  
www.burson-marsteller.co.uk

Penn Schoen Berland  
Level 6 South  
Central Saint Giles  
1 St Giles High Street  
WC2H 8AG London  
+44 207 300 6424  
www.psbresearch.com

## AFFILIATES

### Czech Republic

Bison & Rose  
Ovenecká 9  
170 00 Praha 7  
+420 233 014 000  
www.bisonrose.cz

### Estonia

Hamburg & Partners  
OÜ Hamburg ja Partnerid  
Roosikrantsi 2  
Tallinn 10119  
+372 6 110 105  
www.hamburg.ee

### Greece

Advocate Burson-Marsteller  
74, Panormou Str.  
115 23 Athens  
+30 210 693 1000  
www.advocate-bm.gr

### Hungary

Chapter 4 Communications  
Network in CEE/SEE  
HQ Austria  
Währinger Strasse 61  
1090 Vienna  
+43 (0)1 2367 289 - 7200  
www.chapter4.at

### Latvia

Mediju Tilts  
Dzirnavu ielā 43 – 4  
Rīgā LV 1010  
+371 6728 2816  
www.medijutilts.lv

### Lithuania

BVRG  
Mėsinių g. 5/2  
01133 Vilnius  
+370 5 2153377  
www.bvrg.lt

### Poland

CEC Government Relations  
Wiejska 12  
00-490 Warsaw  
+48 22 628 2418  
www.cecgr.com

### Portugal

Lift Consulting  
Quinta de Fonte -  
Ed. D. Amelia Piso 0, Lado B  
2770-229 Paco de Arcos  
+351 21 466 6500  
www.lift.com.pt

### Romania

Chapter 4 Communications  
Network in CEE/SEE  
HQ Austria  
Währinger Strasse 61  
1090 Vienna  
+43 (0)1 2367 289 - 7200  
www.chapter4.at



**Burson Marsteller**

For our EMEA network, please visit  
www.burson-marsteller.eu