Copenhagen Business School

ENGLISH AS A LINGUA FRANCA IN DANISH EXPORT BUSINESSES

ON THE CHOICE OF FOREIGN LANGUAGE COMMUNICATION STRATEGIES IN DANISH BUSINESSES EXPORTING TO THE RUSSIAN MARKET

Thesis by

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Resumé (Abstract in Danish)

Engelsk som *lingua franca* i de danske eksportvirksomheder. Fremmedsproglige kommunikationsstrategier i virksomheder med eksport til Rusland

Denne kandidatafhandling omhandler de danske eksportvirksomheders håndtering af de fremmedsproglige aspekter af deres aktiviteter i Rusland.

Opgaven tager afsæt i Sonja Vandermeerens terminologi om fremmedsproglige strategier, nemlig *standardiserings*- vs. *tilpasningsstrategier,* hvor *standardisering* dækker over brugen af engelsk som *lingua franca (ELF),* og *tilpasning* indebærer et bevidst valg af den udenlandske forretningspartners sprog (Vandermeeren, 1998, s. 38, citeret i Verstraete-Hansen, 2008, s. 29-30). Tidligere undersøgelser som *ELISE* (2000), *ELAN* (2007) og *Hvad skal vi med sprog?* (2008) har vist, at danske virksomheder i stort omfang benytter *ELF* i international samhandel og at værdien af fremmedsproglige kompetencer (på nær engelsk) er stærkt undervurderet i det danske erhvervsliv. Dette er måske ikke så overraskende set i lyset af, at Danmark primært handler med de engelsktalende, tysktalende og skandinaviske markeder. Derfor var det interessant at undersøge, hvordan eksportørerne håndterer den sproglige dimension af deres aktiviteter på et marked, som sprogligt og kulturelt er mere fjernt og hvor engelske kompetencer ikke er en selvfølge. Det russiske marked er valgt som eksempel på et sådant marked i denne afhandling.

Som udgangspunkt antages det, at en virksomheds valg af en kommunikationsstrategi kan være betinget af blandt andet virksomhedens *størrelse, branche*, det specifikke *eksportmarked* og virksomhedens opfattelse af hvor *betydningsfuldt* og *attraktivt* markedet er. Derudover antages det, at hvis en dansk virksomhed står over for et attraktivt marked, som hverken er et engelsktalende land eller et land, som traditionelt kan betragtes som en stærk bruger af engelsk, vil virksomheden være mere tilbøjelig til at anvende *tilpasningsstrategien* frem for *ELF*, og at virksomheden som resultat kan opnå større succes på markedet.

Afhandlingen er baseret på en analyse af primært kvantitative data fra den elektroniske spørgeskemaundersøgelse *De danske eksportvirksomheders fremmedsproglige strategier for det russiske marked.* Undersøgelsen blev gennemført i foråret 2009 og omfattede 79 virksomheder.

Blandt afhandlingens vigtigste indsigter kan fremhæves:

- På trods af eksportørernes overvejende positive opfattelser af det russiske markeds attraktivitet og betydning og indikationer på, at mange oplever markedet som mere vanskeligt at bearbejde i forhold til andre markeder, er det kun 38% der er i besiddelse af russiske kundskaber, hvoraf flere kun har *"lidt kendskab til russisk"*. Engelsk er det

sprog, der bliver brugt oftest i alle kommunikationssituationer (mundtlige såvel som skriftlige).

- Selve begrebet *fremmedsproglige kommunikationsstrategier* er langt fra veletableret blandt eksportørerne – de færreste har gjort sig overvejelser om en kommunikationsstrategi eller foretaget et bevidst valg af kommunikationssproget, heller ikke når der er tale om *ELF*. I de fleste tilfælde er *ELF* blot en "standardindstilling" for international kommunikation, hvis hensigtsmæssighed ikke bliver taget op til en kritisk vurdering. På den baggrund vurderes, at respondenternes håndtering af de sproglige aspekter ikke kan betegnes som *standardiserings*- eller *tilpasningsstrategier.* I stedet bliver der identificeret 7 *sproglige fremgangsmåder* eller *linguistic practices* (*LPs*), hvor *LP #1* er den fremgangsmåde, der muliggør den højeste sproglige imødekommenhed og tilpasning, og *LP #7* – den laveste eller endda ingen.
- *LP #7* (brug af *ELF*, ingen medarbejdere med russiske kundskaber, sjælden eller ingen brug af tolke/oversættere) er den oftest brugte fremgangsmåde (27%), efterfulgt af *LP #4* (eget salgskontor i Rusland, men ingen medarbejdere med russiske kundskaber herhjemme i Danmark) (18%), *LP #5* (brug af russiske agenter, kommunikationssproget er engelsk) (17%), *LP #3* (medarbejdere med både russiske og engelske kundskaber, lejlighedsvis brug af tolke/oversættere) og *LP #6* (ingen medarbejdere med russiske kundskaber, men hyppig brug af tolke/oversættere til specifikke opgaver) er på fjerdepladsen med 15% hver. *LP #1* (medarbejdere med russiske kundskaber herhjemme i Danmark samt et salgskontor i Rusland) og *LP #2* (medarbejdere med gode russiske kundskaber herhjemme i Danmark, al kommunikation foregår på russisk) anvendes kun af henholdsvis 5% og 4%.
- Der er visse sammenhænge mellem de forskellige *LPs* og variablerne *størrelse, branche* og *markedets attraktivitet* og *betydning.* Det er dog ikke alle sammenhænge, der er lige stærke, hvilket indikerer, at andre faktorer, som afhandlingen ikke behandler, kan spille en rolle.
- Analysen indikerer, at der også kan være en sammenhæng mellem eksportørernes *LPs* og deres succes på det russiske marked. For eksempel giver virksomhederne med den laveste grad af sproglig tilpasning (*LP #7*) udtryk for at være mindst tilfredse med deres resultater, og deres salgsandele, som kan henføres til det russiske marked, er mærkbart lavere end andres. Dette indikerer, at der for eksportørerne kan være en økonomisk begrundelse for at tillægge forskellige fremmedsproglige kompetencer større værdi og integrere dem i planlægningen af deres eksportaktiviteter.

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1. Introduction

1.1 Background information

Denmark is a relatively small economy with a limited domestic market. Therefore, it is highly dependent on business relations with other countries, and its export markets in particular. The Danish (DK) manufacturing sector has long been highly export-oriented, and internationalization has been high on the agenda in the non-manufacturing sector as well (Krak, 2009). As the number of cross-border and cross-cultural business encounters grow, they do not necessarily result in improved bottom lines. However, they undoubtedly make the so-called “soft issues” of doing business such as national and corporate cultures as well as language issues increasingly more interesting to explore. Clearly, apart from being able to manufacture the right goods or provide the right services that appeal to foreign markets, the ability to communicate effectively with foreign partners and customers is essential for businesses in order to initiate, retain and develop successful business relations on the international stage. And, since Denmark is “a country whose majority language constitutes a minority language outside the country itself” (cited in Simonsen, 2009, p. 203), the need for effective international communication places demands on DK businesses’ competence in foreign languages (FLs).

One of the most recent studies on the use of FL skills in the DK corporate sector was conducted in 2007-2008 by the Confederation of Danish Industries (DI) in cooperation with Lisbeth Verstraete-Hansen, an associate professor at Copenhagen Business School (CBS). The study was based on a questionnaire survey carried out among 312 DI-member businesses and its main conclusions were that *a)* English seems to have gained a special status in the DK corporate world and is commonly perceived as the *lingua franca* of international trade, *b)* the relative value that businesses attach to other FLs is diminishing, and *c)* formal FL qualifications as such seem to have lost their recognition as valuable and profit-generating knowledge (Dansk Industri, 2007; Verstraete-Hansen, 2008). It may be argued, though, that some reservations should be made as to how these conclusions apply to the DK corporate world:

1) *Firstly,* the scope of the study is very broad and the findings provide a rather unrefined picture of DK businesses’ use of and need for FL skills, as the study did not distinguish between the industries the 312 respondents represent, the markets they trade with, the export shares the different markets account for, the businesses’ roles as exporters vs. importers, etc. The only variable introduced was the size variable in Verstraete-Hansen

(2008) - small and medium-sized enterprises (SMEs) with fewer than 250 employees vs. large companies with more than 250 employees.

2) And *secondly*, since the study only included members of DI, it is questionable whether the sample is entirely representative of all DK businesses. It could be argued that *a)* businesses choosing to join DI may possess some inherent characteristics that non-members do not have, and *b)* DI-members may benefit from the organization's networks and knowledge pool, e.g. market-specific knowledge and assistance with exports promotion activities, which may influence the way DI-members perceive and address the FL issues of their international activities.

1.2 Key propositions

This study's point of departure are the following two propositions, formulated primarily on the basis the findings in Verstraete-Hansen (2008) indicating that *a)* DK businesses rely increasingly more on English as the *lingua franca (ELF)* of international trade, thus primarily employing the *standardization strategy* for international communication, and that *b)* there is a general drop in the value that businesses attach to other FLs. Also, with a view to arriving at a more detailed picture of businesses' FL approaches than that provided by Dansk Industri (2007) and Verstraete-Hansen (2008), a number of other variables apart from the *size* variable are introduced.

1.2.1 Proposition 1

When confronted with an attractive foreign market that is neither an English-speaking country nor a strong user of English, DK exporters to this market are more likely to employ the adaptation communication strategy rather than the standardization communication strategy, which should result in improved performance on that market.

It is reasonable to assume that, when confronted with a FM where English is not a barrier to communication, DK businesses will most likely opt for the *standardization strategy*, i.e. the use of *ELF*, even if English is not the foreign customer's mother tongue. However, DK businesses' reliance on English will obviously be challenged by a FM where the availability of English skills may not be taken for granted. Hence, it may be assumed that businesses will be forced to employ the *adaptation strategy*, i.e. the use of the local language, to be able to capitalise on the opportunities of the FM. Thus, businesses' interest in penetrating a particular

FM that is not a strong user of English will be reflected in their demand for and use of the relevant linguistic and cultural expertise, especially if the FL in question is a less commonly taught one and the general exposure to the country's culture is limited. As a result, the implementation of the *adaptation strategy* will result in a more informed and linguistically and culturally more responsive approach to the FM, which in turn may be expected to enhance export performance.

1.2.2 Proposition 2

> *Businesses' linguistic approaches are influenced by variables like their size, the industries they represent, the particular foreign market(s) they are trying to gain a foothold on, and this particular market's attractiveness and relative importance.*

The importance of the *size variable* was established in Verstraete-Hansen (2008), as the author's preliminary assumption that there may be differences between SMEs' and large companies' attitudes and approaches to FL issues was confirmed. For example, the report reveals that large DK businesses have a much higher degree of presence in such "exotic" markets as Arabic-, Portuguese-, Chinese- and Russian-speaking markets than SMEs (*ibid.,* p. 21), and that they employ significantly more B.A. and M.A. graduates trained in FLs compared with SMEs (*ibid*., p. 24). The immediate explanation of such differences could be the fact that businesses' size is closely linked to their resources. Thus, SMEs have scarcer resources at their disposal for initiatives like employing staff whose primary qualifications are expertise in FLs, investing in language training of existing staff, or initiating business relations on the more "exotic" markets. Also, they may not be as good at attracting international staff with native-speaker proficiency in FLs.

The variables *industry* (i.e. the products that businesses represent), *the particular foreign market* (i.e. the cultural and linguistic challenges businesses are confronted with) and that particular *market's attractiveness and importance* were found important to take account of on the basis of the following assumptions:

1) It is reasonable to assume that exporters' need for FL and intercultural expertise will vary dependent on the *industry* they represent, even if the exporters are of the *same size*, and operate on the *same FM*, and the FM is *equally attractive and important* to them. Thus, for example, *Exporter A* manufacturing and exporting high-tech agricultural machinery

will be expected to ensure that the product complies with the national regulations of the export country and provide complex product-related literature in the country's language, which will place great demand on *Exporter A's* FL skills. By contrast, *Exporter B* exporting spices or jewellery to the same FM will most likely face fewer linguistic and cultural challenges, which may result in significantly different linguistic approaches.

2) It is reasonable to assume that there will be differences in the linguistic approaches of *same-size* businesses even if they operate in the *same industry*, simply dependent on whether they operate on a single FM that is closely related to Denmark in cultural and linguistic terms, e.g. Sweden or Norway, or on multiple and highly diverse FMs like Russia, China, France, Germany and the U.S., which would significantly increase the level of cultural and linguistic challenges. And even more so, if the businesses represent *different industries* and their FMs are *not the same*, are *not* perceived as *equally attractive* and/or of *equal importance*.

It may also be assumed that additional differences may be triggered in all imaginable scenarios of international communication dependent on whether the business studied is the exporter (seller) or importer (buyer) in a particular business relation. Obviously, the prospect of gaining access to a new FM, would make the seller more willing to adapt to the buyer than the other way around - in the context of this study, adaptation would mean learning/speaking the foreign buyer's language, providing sales and product-related material in that FL, gaining insight into the buyer's (business) culture, etc. In other words, "you can buy in your language, but you must sell in the language of your customer" (CILT, the National Centre for Languages, n.d., p. 5). In the context of this study, exporters' linguistic approaches are of greater interest and are the sole focus of the study.

1.3 Choice of a foreign market for the study

In contrast to Verstraete-Hansen (2008), the focus of this study is narrowed down to only one foreign market (FM) and only DK exporters operating on this FM. Such a scope limitation is expected to result in a more detailed depiction of how businesses address the FL issues in their communication with the FM studied.

The following three criteria were considered central in the choice of the FM to be studied:

1) the preferred FM had to be relatively immature, but with great potential for economic growth, which would increase the likelihood of DK businesses participating in the study to perceive the FM as highly attractive;
2) the preferred FM could not be an English-speaking country or a country that is traditionally perceived as a strong user of English so that DK businesses' widespread reliance on *ELF* could be challenged;
3) the preferred FM had to be relatively distant in terms of culture and language, i.e. the language of the country had to be one that is less commonly taught and spoken in Denmark, and the general exposure to the country's culture had to be limited, which would increase the likelihood of linguistic and cultural barriers to be more significant for DK businesses and further challenge their reliance on *ELF*.

The Russian market was found particularly suitable for the study.

1.4 Study sample

The sample of DK businesses had to fulfil all of the following criteria:

1) all the respondents had to have HQ in Denmark;
2) all the respondents had to have export operations in Russia;
3) the sample had to represent businesses of various sizes, a wide range of industries and geographical locations, and businesses that are both DI-members and non-members.

The final sample consisted of 79 exporters (for more details see *Appendix I*).

1.5 Research questions

By scrutinizing *Propositions 1* and *2* set out above and with the variables representing cultural and linguistic challenges (i.e. Russian) and the "exporter role" of the DK businesses studied kept constant at all times, the paper seeks to answer the following two questions:

1. How do Danish exporters manage the foreign language aspects of their activities in Russia in terms of opting for the *standardization strategy* vs. the *adaptation strategy*, dependent on such variables as *size*, *industry*, and exporters' perceptions of the *market's attractiveness* and its *relative importance*?
2. How does the choice of the *standardization strategy* vs. the *adaptation strategy* affect exporters' success on the Russian market?

Thus, it is hoped that this study will provide a more refined picture of how DK exporters address FL communication with a particular FM, with a special focus on businesses' choice between the *ELF* and the local language of the market, and its implications for export performance.

1.6 Theory and terminology

As regards FL communication strategies, this paper operates with the terminology proposed by the Belgian researcher Sonja Vandermeeren, namely the *standardization strategy*, i.e. using *ELF*, versus the *adaptation strategy*, i.e. using the local language of the FM, i.e. Russian in the context of this study (Vandermeeren, 1998, p. 38, cited in Verstraete-Hansen, 2008, pp. 29-30).

Furthermore, dependent on their choice of FL strategy, DK exporters will be categorized according to the four linguistic exporter profiles proposed by the British Chambers of Commerce (BCC), namely *Opportunists, Developers, Adaptors* and *Enablers* (for definitions see *Appendix II*).

1.7 Methodology

This study is mainly based on primary quantitative data, supplemented with some secondary data sources. The primary data was obtained by means of an electronic questionnaire *"Danish exporters' language strategies for the Russian market"* designed specifically for this study. The questionnaire was sent out to the sample of DK exporters three times in the period April-May 2009. The quantitative approach was chosen with a view to arriving at a representative picture of how DK exporters manage the FL aspects of their activities on the RU market dependent on the variables set out in *Proposition 2*. It was also hoped that the questionnaire data would provide an opportunity to categorize DK exporters according to the BCC's four exporter profiles, establish how widespread the individual profiles are and how they affect businesses' export performance.

The questionnaire also provided an opportunity for obtaining some qualitative data, as respondents were asked to elaborate on their linguistic approaches.

The whole process of first designing the questionnaire and then analysing the collected data was greatly supported by Sebastian M. Rasinger's book *"Quantitative Research in Linguistics"* (Rasinger, 2008).

1.7.1 Methodological considerations as regards *Proposition 1*

Proposition 1 will be scrutinized through the steps below.

<u>*Market attractiveness assessment*</u>

First, the attractiveness of the RU market will be assessed - partly on the basis of an objective review of the country's economic and other factors of relevance to international trade, and partly on the basis of DK businesses' perceptions of and attitudes towards it. The objective review and businesses' subjective assessments were both deemed important to take account of because they do not necessarily correspond, as, for example, *a)* not all DK exporters may be aware of the potential and opportunities for their products/services on the RU market, *b)* not all products or services may actually appeal to this particular FM, and *c)* various trade barriers, if perceived as significant and hard to overcome by the individual exporters, may actually make it difficult to capitalise on the otherwise promising FM, and make it appear less attractive. It is assumed that the degree of attractiveness as perceived by the individual exporters may influence their approaches to language-related issues. Thus, an exporter who sees great potential for his products/services on the RU market and plans to make it one of his key markets may be expected to be more likely to employ the *adaptation language strategy* than an exporter who sees the opportunities of the market as significantly less promising for his particular products/services.

The objective assessment of the RU market's attractiveness will be based on secondary data, e.g. country analyses, economic growth forecasts, statistics on foreign trade, etc. As this study does not aim at providing a comprehensive economic study of the RU market as such, the analysis will be rather brief and restricted to key aspects. The analysis of businesses' own assessments of the market will be more extensive and detailed and it will be primarily based on primary data obtained via the questionnaire *"Danish exporters' language strategies for the Russian market"*, particularly *Q27, Q28, Q30, Q31,* and *Q34* (see *Appendix III*), supplemented with some secondary data from earlier surveys.

<u>*Assessment of demand for RU skills*</u>

Next, businesses' current and anticipated needs for RU linguistic and cultural expertise will be assessed, based on data from the questionnaire, in particular *Q22, Q41, Q46, Q51, Q53, Q54, Q55,* and *Q56.* The rationale behind this is the already mentioned assumption that, ideally, the more attractive a particular FM is perceived as, the more keen businesses should be on gaining access to country-specific expertise. Thus, should the assessment of the RU market reveal that DK businesses perceive it as highly attractive, their demand for RU skills may be expected to be accordingly high and vice versa. The analysis will seek to establish whether this actually is the case for DK exporters participating in the study.

In the assessment of exporters' current and anticipated demand for RU skills, a distinction will be made between their needs for in-house skills vs. external assistance. The former will be further categorized as either native-speaker competence, formal RU qualifications obtained via education, or RU skills obtained otherwise, whereas the latter will be further divided into translators/interpreters based in Denmark and those based in Russia.

Choice of standardization vs. adaptation strategies and its link to success

The study will seek to establish the extent to which DK exporters use *ELF* vs. Russian with their RU relations on the basis of the questionnaire data, particularly *Q36, Q37, Q38, Q41, Q46, Q49,* and *Q53*. Dependent on the FL strategy employed, exporters will be categorized according to the BCC's four linguistic exporter profiles in order to establish how widespread the individual profiles are. Exporters' preference for either the *standardization* or the *adaptation strategy* and how the different approaches affect their export performance will be analysed on the basis of the quantitative and qualitative data obtained via the questionnaire. In order to assess businesses' export success, three elements were included in the questionnaire, namely export sales shares generated from the RU market (*Q29*), frequency of miscommunication with RU relations (*Q43*), and exporters' own assessments of how successful their RU activities typically are (*Q33*). Thus, the assessment of export performance will mainly be of subjective character, i.e. as perceived by exporters themselves.

1.7.2 Methodological considerations as regards *Proposition 2*

Proposition 2 will be scrutinized through an analysis of the quantitative data from the questionnaire aimed at identifying significant differences or similarities, if any, in businesses' choice of FL strategies, dependent on the variables *size, industry*, (perceptions of) *market's attractiveness* and *importance* (*Q4, Q8, Q27* and *Q28*). Moreover, an additional variable will be taken account of, namely businesses' being DI-members vs. non-members (*Q5*).

1.8 Methodological reservations

As is typical for any questionnaire-based quantitative research, the most considerable methodological reservation in relation to the questionnaire data is the uncertainty about the sufficiency and reliability of the individual respondents' knowledge. It is difficult to assess the respondents' insight into their respective businesses' language matters and whether they actually answered the questions to the best of their knowledge. However, it should be noted that the sample consists of respondents who willingly expressed their interest in participating in the study before the questionnaire was sent out, which should ensure a higher degree of motivation to fill out the questionnaire as carefully as possible. Also, the fact that the respondents representing their businesses in the study typically held positions like export manager, country/regional or area sales manager (at least 60% of the sample) should lend credibility to the collected data.

It is also recognized that other factors and variables than those considered in this particular study may have influence on the way FL issues are addressed by the respondents.

Since the exact number of exporters to Russia is not available (cf. *Appendix I*), it is not possible to give a precise assessment of the sample's representativeness for the entire population of DK exporters to Russia. Moreover, despite the effort to make the sample as representative as possible in terms of businesses' size and industry, not all the categories of the two variables are equally well-represented in the sample, which may skew some of the results of the data analysis. Therefore, along with the percentages of the total sample the individual categories account for, the actual numbers of respondents in each category will also be indicated.

As to the participants' performance on the RU market, an objective and precise assessment is difficult to carry out within the framework of this study, due to such factors as businesses' size (and thus differences in sales and earnings), differences across industries, dissimilar experience with international trade in general and on the RU market specifically, etc. Businesses' sales shares on particular FMs and especially the exact amounts is sensitive information that businesses are reluctant to disclose. Thus, one of the 79 respondents declined to reveal their RU export sales share, and several others said they were not entirely sure about the actual figure. As a result, the assessment of the participants' export performance on the RU market is largely of subjective character, i.e. as perceived by the exporters themselves. It is also a disadvantage that the questionnaire did not allow for gathering data on whether the individual businesses had been experiencing an increase or decrease in their exports to the market as they acquired (or in some cases lost) additional RU skills.

1.9 Structure

Chapter 2 provides an overview of the spread of English as the *lingua franca* of trade in the DK corporate world in general. It also presents a case for the need for a diversity of FLs, if DK businesses are to compete successfully on the global marketplace.

Chapter 3 is the first step towards the verification of *Propositions 1* and *2.* Here, the RU market's attractiveness is assessed, and businesses' perceptions of and expectations towards the market are established – both as regards the study sample as a whole and broken down by the variables *DI-members vs. non-members, size* and *industry.*

Chapter 4 is the second step towards the verification of *Proposition 1,* as it seeks to establish how exporters' perceptions of the RU market established in *Chapter 3* are reflected in their demand for RU skills. The chapter assesses the exporters' overall linguistic awareness, the most common communication situations (CSs) they face with their RU relations, their demand for RU linguistic and cultural expertise in general, the FLs they tend to use in the different CSs along with the frequency of relying on own staff vs. external expertise.

Chapter 5 is the third and final step towards verification of *Propositions 1* and *2.* The exporters' linguistic approaches are categorized into different *linguistic practices* (LPs) and linked to the BCC's four exporter linguistic profiles. Then, an analysis is carried out with a view to establishing the link between the identified LPs/profiles and the variables *DI-membership, size, industry, the RU market's attractiveness* and *importance.* Finally, the link between the different LPs/profiles and the respondents' export performance is analysed.

Chapter 6 brings the findings of the preceding chapters together and provides the final conclusions of this study.

Appendix I includes a description of how the final study sample was arrived at and how the key variables were defined and measured for the purpose of this study.

Appendix II provides definitions of the four linguistic exporter profiles proposed by the British Chambers of Commerce (BCC), namely *Opportunists*, *Developers*, *Adaptors* and *Enablers.*

Appendix III contains a print-out of the electronic questionnaire "*Danish exporters' language strategies for the Russian market*" that formed the basis for this study.

2. English as the Danish corporate world's *lingua franca*

Based on a number of DK and European studies of businesses' use of FLs, this chapter provides a brief overview and discussion of the use of and attitudes towards English in the DK corporate world. This aspect is found relevant in the context of this study because of the way the reliance on English skills in international communication seems to be affecting the recognition of the need for other FLs (presumably, including Russian) and the value DK businesses attach to them.

The objectives of the chapter are:

- *to illustrate the extent of the use of English by DK businesses, their perceptions of English as the lingua franca of international trade and the relative value they attach to other FLs*, and
- *to discuss the possible implications of exclusive reliance on English skills for DK businesses' competitiveness on the global marketplace.*

2.1 The extent of the use of English in the DK corporate world

A number of studies of the use of FLs by DK businesses provide evidence that the English language (EL) has gained a special status in the DK corporate world. In 2000, the *ELISE* study revealed that English was the indisputably most widely used FL among DK businesses - as many as 92% of the 52 respondents in the study claimed to use English for international trade and the same share of respondents (92%) perceived English as the most important FL (Jørgensen, 2000, p. 6). Verstraete-Hansen (2008), which is one of the most recent studies of the use of and attitudes towards FLs in the DK corporate world, reinforced the indisputably dominant position of English in the DK corporate world - as many as 100% of SMEs and 96.7% of large companies stated to have employees proficient in English. This finding is not so surprising in the light of the fact that English has become the first FL in the DK education system and also the most widely spoken FL in the country (European Commission, 2006). The second most commonly used and important FL among DK businesses participating in the *ELISE* study was German (81%), followed by French (33%), Swedish (19%) and Spanish (17%) (*ibid*.). It should be noted that this trend reflects FL teaching in DK schools.

The use of English is not reserved to communication with English-speaking FMs - the language is also widely used in interaction with foreign partners and customers that have other

FLs as their mother tongues. This indicates the widespread acceptance of English as the *lingua franca* of international trade, which, in turn, encourages the use of the *standardization language strategy*. Thus, in Verstraete-Hansen (2008), almost 60% of DK businesses stated to rely solely on English when communicating with their international markets, and another 30% stated to use a mixture of English and the partner's/customer's mother tongue (Verstraete-Hansen, 2008, p. 30). Only as few as 8.7% of large companies and 4.9% of SMEs stated they used their international partners'/customers' languages (*ibid.*) – an indication of how uncommon the *adaptation language strategy* is among DK businesses in general.

2.1.1 English as a corporate language

Using English is also commonly perceived as an indicator of businesses being internationally or globally oriented. Thus, many DK businesses choose officially to adopt English as their corporate language, creating English versions of their websites, translating all important documentation into English, conducting meetings in English, etc. In 2007, a study carried out for the Danish Confederation of Industries (DI) by *Epinion-Capacent* revealed that, in a sample of 400 DK businesses, every fourth business had adopted English as the corporate language (Holm & Pedersen, 2007). In this connection, it was emphasized that businesses that choose to do so tend to have a rather pragmatic approach to the use of English at work. Thus, if only Danes are involved in a particular communication situation the communication language is Danish, whereas English is used if there are foreigners among the participants (*ibid.*).

As regards the sample of 79 exporters to Russia participating in this study, 42% (n=33) stated they had adopted an official corporate language (*Q13*). More than half of these businesses (52%, n=17) have chosen both Danish and English as their corporate languages, 45% (n=15) have chosen English, and one large multinational company stated that their corporate languages were both English and the local languages of the countries they operated in (*Q14*). Interestingly, none of the participating businesses has adopted Danish as their sole corporate language. Obviously, this is a reflection of the fact that the respondents are highly internationally-oriented. In fact, as many as 88% of them stated to generate at least half of their sales from FMs (*Q10*).

In this connection, it is also interesting to mention that, when asked about the language(s) in which the respondents provided information on their websites, 97% of them (n=77), stated to have an English version of their websites, whereas only 61% (n=48), had a Danish one (*Q19*). Thus, all but two respondents have an English-language website - even those businesses that do not have a version in their native language. These findings should be seen in the light of the fact that English-speaking markets are rated as "*the most significant*" export areas by as many as 91% (n=72) of the respondents and as "*rather significant*" by 8% (n=6) (*Q11*), which reveals the dominance of English-speaking export markets as DK businesses' strategic environment, thus justifying and promoting their investment in the English language.

2.1.2 English and the relative value of other foreign languages

One of the most important findings in Verstraete-Hansen (2008) as regards the attitudes towards FL skills in the DK corporate sector was that DK businesses do not attach any significant value to FLs other than English in international business settings (p. 63). Moreover, more than 40% of the respondents in the study indicated that their international relations' inability to speak English poses a communication barrier (*ibid*., p. 35). In other words, there is evidence that many DK businesses have embraced English as the *lingua franca* of international trade and tend to take English skills for granted when communicating internationally. Therefore, they simply expect their foreign relations to master the language instead of trying to adapt their communication to their partners/customers to overcome the language and cultural barriers. As a result, when encountering communication problems, DK businesses tend simply to attribute the problems to their foreign relations' inadequate English skills rather than to their own limited linguistic arsenal, which Verstraete-Hansen (2008) also pointed to. This may be interpreted as an indication of "Anglophone complacency", as the *ELAN* survey from 2006 refers to this phenomenon, despite the fact that Denmark is not an English-speaking country (CILT, the National Centre for Languages, 2007, pp.6, 20, 23). Even though the DK response rate was rather low in the *ELAN* study, it is still interesting to mention the finding that Denmark along with English-speaking countries like the UK and Ireland scored very low down in the index of linguistic and cultural awareness in regards to their export markets as "they use, and expect to use English, for most of their trading" (*ibid.*, p. 20). This explains the finding that other FL skills seem to have lost their recognition as valuable and profit-generating knowledge.

The widespread belief among DK businesses that English is the most important FL is also reflected in their FL training offers. Thus, 62% of the 29 DK businesses that stated actually to have conducted FL training of their employees in the *ELISE* study had offered courses in English, followed by German courses (48%) (Hagen, 2001). Moreover, a majority consisting of 72% of the 32 businesses that stated to have future plans for conducting language training planned to provide training in English. (*ibid*., p. 13).

As regards DK businesses' anticipated demand for FL competence, English is the most sought after FL among SMEs, with 26.2% expressing the need for additional English skills in the next couple of years (Verstraete-Hansen, 2008, p. 22). As to large companies, English appeared to be the third most sought after FL after Russian (!) and Chinese, with 11.5% assessing they will need additional English skills in the next couple of years (*ibid*.)

2.2 The future of English, implications for DK businesses and the case for investing in a diversity of FL skills

English is undoubtedly one of the world's major languages, and there is a widespread global eagerness to move towards the English-speaking world. However, as Davis (2003) points out, English only accounts for around 30% of the world's Gross Domestic Product (GDP), and is likely to account for less in the future. Therefore, "neglecting other languages means ignoring quite significant potential markets" (Davis, 2003). This view is supported by the linguistic dimension of globalisation presented in Graddol (2006), indicating that the relative power and status of global languages such as Chinese, Hindi/Urdu, Portuguese and Russian (!) is going to increase, as the BRIC-countries' economies rise. At the same time, according to the conclusion of a report presented by EU business leaders in July 2008, emerging economies start outperforming the European bloc in terms of FL skills, which places additional pressure on European businesses' competitiveness on the global marketplace (Davignon, V. E. et al., 2008). Therefore, the exclusive reliance on English skills may prove to be false security for Anglocentric DK businesses and damage their competitiveness in the future.

Already today, the patterns of DK businesses' international trade may be said to reflect their FL competence rather more than market opportunity. Thus, we see that English, German and Scandinavian languages are the most widely used FLs in DK businesses, and English- and German-speaking markets along with Scandinavian countries are the most significant ones for Denmark's international trade (Verstraete-Hansen, 2008, pp. 20-21). This pattern is also confirmed by the respondents in the questionnaire survey conducted for this study, where 99% (n=78) of them rated English-speaking markets as either *"the most significant"* or *"rather significant"* export areas, the corresponding figure for German-speaking markets was 77% (n=61), and for Scandinavian markets – 75% (n=59). In general, DK businesses may be said to be concentrating primarily on already mature markets, in which English- and maybe German-speaking contacts can be found, whereas new markets with much greater potential for economic growth (that are neither English-speaking countries nor strong users of English) are given a lower priority, which often may be due to lack of diverse FL and intercultural skills in businesses.

Interestingly, despite their "avoiding" markets that are linguistically more "exotic", there is evidence that DK businesses encounter problems with international communication. In the *ELISE* study, as many as 29% of DK businesses stated to have experienced language barriers, 37% stated to have encountered cultural barriers, and 6% stated to have lost business as a result (Jørgensen, 2000, p. 6). Verstraete-Hansen (2008) revealed that SMEs experience lack of FL skills as a barrier to their international activities more often than large companies, with 33.5% of SMEs and 24.6% of large companies stating they have experienced such difficulties (p. 33).

The previously mentioned *ELAN* study established a positive link between SMEs possession of and investment in FL skills and their business performance. For instance, it revealed that the availability of certain FL skills within businesses may influence their decision to target a particular market (CILT, the National Centre for Languages, 2007, p. 21). More importantly, the study produced a calculation revealing that an SME investing in such elements of language management as *having a language strategy*, *appointing native speakers*, *recruiting staff with FL skills* and using *translators/interpreters* may achieve an export sales proportion as much as 44.5% higher than an SME without such investments (*ibid*., p. 7). Clearly, this finding makes the notion of the value of FL skills in international trade graspable and hard to ignore – a notion that has long been problematic for the discipline of linguistics, as it was unable to measure the economic value of FL skills as a corporate asset.

In the light of these findings, it is reasonable to expect that investment in a diversity of FL skills and intercultural competence as well as their strategic management can open new business opportunities and facilitate trade in FMs where these FLs are spoken. This view is also supported by *Forbundet Kommunikation og Sprog,* the DK union for communication and languages, that dedicated the whole of its members' journal "*KOM Magasinet*" issued in May 2009 to multilingual communication and the need for diverse FL skills for international business communication (KOM magasinet, 2009). The union is currently working on focused initiatives to stimulate businesses' linguistic awareness and to ensure that the availability of diverse FL skills is given a greater priority in the government's language policies both in relation to the education and corporate areas.

Another argument supporting the case for the need for diverse FL skills in business is that even English-speaking countries encounter difficulties on FMs and lose business as a result of shortages of FL skills (CILT, the National Centre for Languages, 2007). Thus, 6% of UK businesses stated to have missed an opportunity of winning an export contract due to a lack of FL skills, and 11% stated to have experienced difficulties with foreign customers due to cultural differences (*ibid*.). Another publication by the UK National Centre for Languages even claims that nearly half of UK SMEs have experienced linguistic or cultural barriers and one in five has lost business as a result (CILT, the National Centre for Languages, n.d., p. 5). The publication also demonstrates that UK businesses do proportionately more business with markets that are strong users of English than with markets where English is less widely spoken (*ibid*., p. 6). Moreover, they sell more to markets in which English is the language of their customers than they buy from them, whereas they buy more from markets where the language of their customers is not English than they are able to sell (*ibid*., p. 5). This is a clear indication of how Anglophone complacency may be preventing businesses from capitalising on attractive market opportunities - even in the case of businesses that are in the privileged position of being the native speakers of one of the world's major languages. And it may be argued that exclusive reliance on English skills and thus the *standardization language strategy* may prove to be false security to an even greater degree in the case of non-native speakers of English, like Danes.

3. The Russian market's attractiveness for Danish exporters

This chapter is the first step towards the verification of *Proposition 1* set out in the introduction. The objectives of the chapter are:

- *to assess the RU market's attractiveness as an export market for DK exporters based on a brief objective review of key factors and on exporters' perceptions of the market,* and
- *to scrutinize how variables like size, industry and membership of DI vs. non-membership are reflected in exporters' perceptions of the market.*

3.1 Objective review of the RU market's attractiveness

After the financial crisis in 1998, the country's economy had a speedy recovery and has been experiencing steady growth ever since (Goldman Sachs Global Economics Group, 2007). In fact, according to Goldman Sachs Global Economics Group, "Russia's recent performance has been considerably better than projected in the original BRICs papers" (*ibid.*, p. 37). Today, Russia is the world's 12the largest consumer market. Political and economic stability, a growing middle class, increasing consumption and demand for products from the West, investments in infrastructure and industry all suggest great opportunities for exporters. The significant increase in DK exports of goods to Russia over the past decade – from ca. DKK3 billion in 1999 to ca. DKK11 billion in 2008 - indicates that DK exporters have benefited from the favourable developments in Russia (Statistics Denmark, 2008b). Today the country is Denmark's 14th largest export market and, according to the Danish ambassador to Russia, Per Carlsen, the market still holds a lot of untapped potential (Carlsen, 2009). The largest groups of DK export goods are industrial machinery and equipment (DKK 1.4 billion), meat and meat preparations (DKK 1.26 billion), and medicinal and pharmaceutical products (DKK 1.2 billion) (Statistics Denmark, 2008b).

As regards DK export of services to Russia, the total value of service exports more than quadrupled over the course of a few years - from DKK194 million in 2005 to DKK847 million in 2007 (Statistics Denmark, 2008a). The major groups of services contributing positively to the trade balance are various business services, e.g. architectural, engineering and other technical consultancy, royalties and license fees, etc. (*ibid.*). The significant increase in the export of services is especially of linguistic interest, as services often place much greater demand for international communication and, consequently, language skills and cultural knowledge than manufacturing (Graddol, 2006). In general, the noteworthy increase in DK exports of goods and services to Russia implies an increase in intercultural and interlinguistic encounters between DK businesses and their RU customers and partners, which provides good ground for a study of exporters' FL and communication strategies like this one.

Currently, the RU government's primary focus areas are the educational sector, infrastructure, healthcare system and the agricultural sector, and, according to the Danish ambassador to Russia, there is great interest in DK solutions in all of these areas in Russia (Carlsen, 2009). Moreover, the Trade Council of Denmark, Russia, points out that the following areas are of special interest to DK exporters: food and equipment for the food industry, energy and environmental sectors, medical and pharmaceutical products, IT, mobile telephony industry, packaging, building materials, furniture, clothing and service industry (TCD, 2009).

As regards future expectations, Russia's economic growth potential is projected to continue to be high, albeit somewhat weakened by the current global financial crisis. But despite the turmoil in international and RU financial markets and reduced growth forecasts worldwide, the IMF considers Russia as "well positioned to avoid a sharp and lasting reduction in growth" (IMF External Relations Department, 2008). Thus, the IMF's forecast for Russia's GDP growth in 2009 is still as high as 6-6.5% (*ibid.*).

Another positive factor worth mentioning is Russia's forthcoming membership of the World Trade Organization (WTO), which will undoubtedly facilitate the country's international trade relations and increase its attractiveness as an export market.

3.2 DK exporters' perceptions of the RU market across the sample

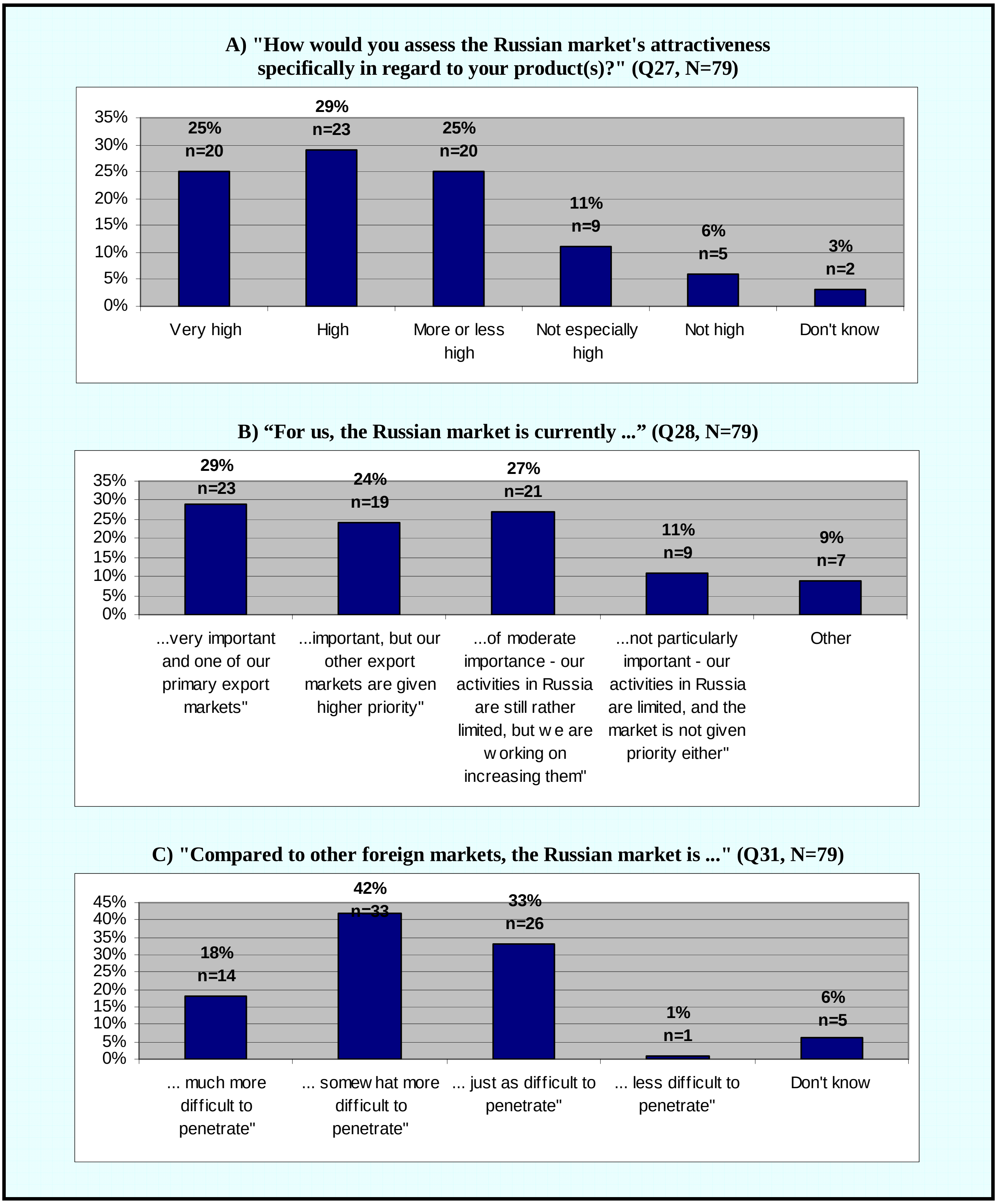
3.2.1 Market attractiveness

It is evident from *Figure 3-1 A)* that every fourth exporter (25%) perceives the RU market's attractiveness as *"Very high"* in regard to their particular products, 29% - as *"High"*, and another 25% - as *"More or less high"*. The negative assessments *"Not especially high"* and *"Not high"* account for only 11% and 6% respectively. Thus, the positive assessments in the objective review above may be said to be supported by most of the exporters.

3.2.2 Market importance

Figure 3-1 B) shows that a majority of the exporters attach significant importance to the RU market, with 29% assessing it as *"very important"* and one of their primary markets, 24% -

Figure 3-1 - Exporters' perceptions of the Russian market



as *“important”* even though their other markets have higher priority, and 27% stating they focus on increasing their activities on the market that currently is *“of moderate importance”*. Only 11% stated the RU market is not particularly important and is not given priority either. It should be noted that the 9% who chose the answer *“Other”* stated that the market *is* important, but as many as 5 of these 7 exporters added that it had lost some of its importance due to the current financial crisis. Hence, these businesses fundamentally see the market as attractive and important, and their current weaker assessments may be said to be of temporary character.

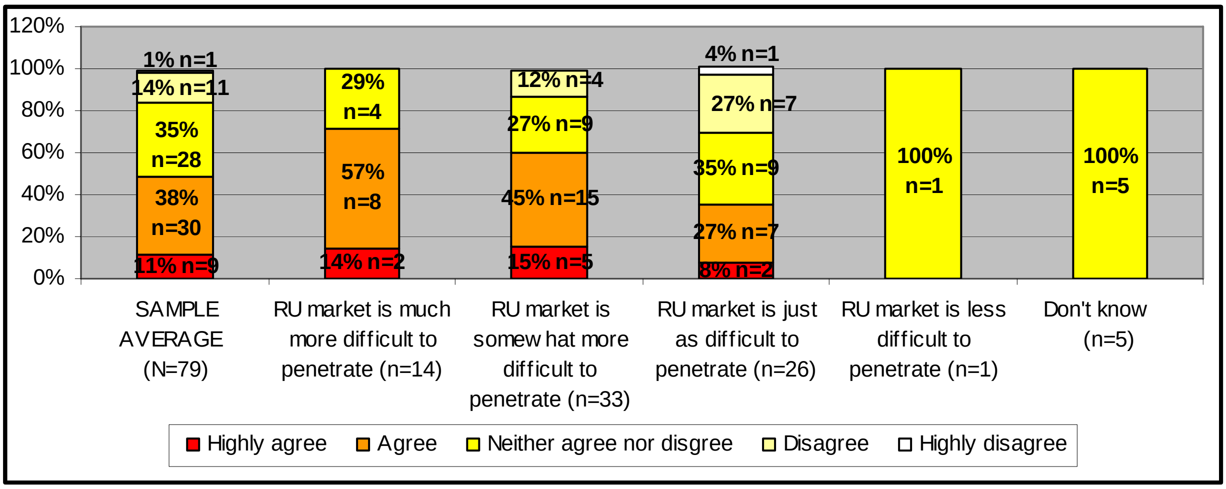
Correlation of the exporters’ assessments of the markets’ attractiveness with the importance they attach to it revealed that, among the 23 exporters who assess the market as *“very important”* and one of their primary markets, 9 out of 10 (91%) perceive the market’s attractiveness as either *“Very high”* (61%) or *“High”* (30%), and the remaining 9% – as *“More or less high”*. In the case of the 19 exporters who assess the market as *“important”*, 74% perceive the market’s attractiveness as either *“Very high”* (21%) or *“High”* (53%). At the same time, 7 of the 9 respondents who assess the market as *“not particularly important”* perceive the market’s attractiveness as either *“Not especially high”* (33%) or *“Not high”* (44%). Thus, it is clear that businesses prioritizing the RU market the most see it as very attractive for their products. This relationship may be said to be common sense, as businesses would hardly focus on a market they perceive as unattractive. However, establishing this correlation is important, as, firstly, it indicates that the respondents completed the questionnaire accurately, and, secondly, it may prove useful in the analysis of their language strategies.

3.2.3 Difficulty of market entry and major barriers

Previous studies provide evidence that DK exporters do not perform as well on the RU market as exporters from other comparable European countries (DI, 2009; Econ Analyse, 2004). The reason is believed to be the fact that various trade barriers make it difficult for DK businesses to penetrate it. According to a report on DK businesses’ opportunities on the RU market from 2004, the most significant trade barriers are corruption (20%), regulations being changed often and without notice (13%), constraining rules and regulations for foreigners (11%), and technical trade barriers (8%) (Econ Analyse, 2004). Another study of trade barriers in Poland, the Baltic countries and Russia carried out in 2003 demonstrated that, besides the various technical trade barriers, the *language barrier* and bureaucracy in Russia are significant obstacles to trade too, and particularly for SMEs, as usually they are not big and financially strong enough to establish local sales offices or subsidiaries and employ Russian-speaking staff (Erhvervs- og Boligstyrelsen, 2004). At the same time, the importance of local representation was emphasized at a workshop *"Succesfuldt salg til det professionelle marked i Rusland" ["Successful sales to the professional market in Russia"]*[1] held by DI at the end of 2008 – there was widespread agreement among the participants that the market is difficult to manage effectively from Denmark and that local presence is crucial for gaining success (Bruhn, 2009).

Figure 3-1 C) reveals that in aggregate 60% of the sample perceive the RU market as either *"much more difficult"* (18%) or *"somewhat more difficult"* (42%) to enter than other markets. Thus, the assumption that Russia is a more challenging market for DK exporters compared to other markets is confirmed by a majority of the respondents. However, every third exporter (33%) finds the market is equally difficult to enter as any other market. The perceived difficulty of entering the RU market was important to establish, as, besides verifying the initial assumption that the market is challenging for DK exporters, it may also indicate exporters' actual awareness of the market's cultural, linguistic and other barriers.

Figure 3-2 – Do you agree or disagree with the following statement: "Russian mentality and business culture are very different and difficult to understand" (Cross-tabulation of Q31 and Q58.7)



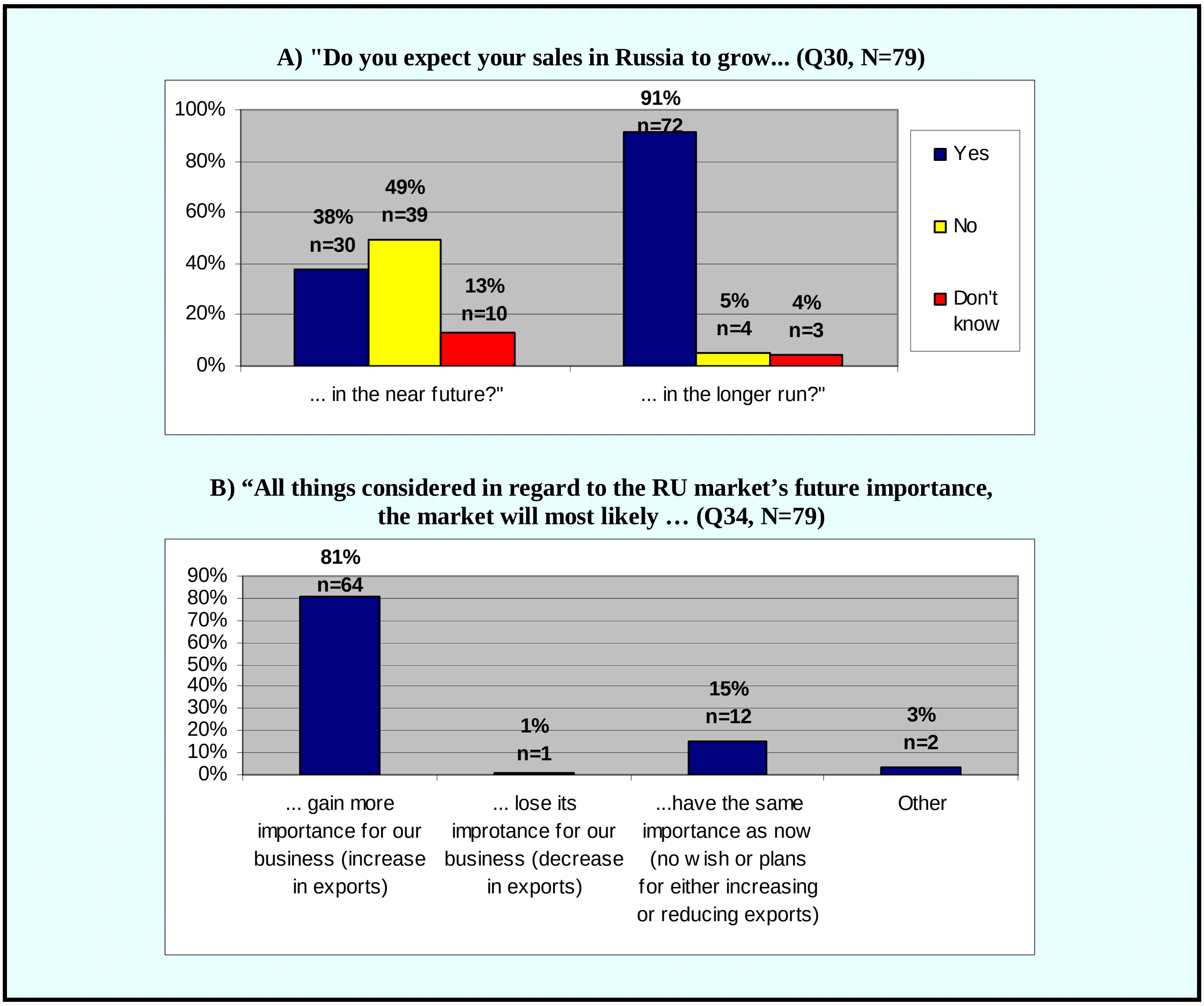
NB: The darker the colour, the higher the agreement rate

Interestingly, significant shares of the respondents who consider Russia as a more challenging market either *highly agree* or *agree* with the statement that RU mentality and business culture are very different and difficult to understand - 71% of those who find the market is much more challenging, and 60% of those who find it is somewhat more challenging than

[1] N.B. My translation

other markets, which is well above the sample average of 49%, see *Figure* 3-2**.** The corresponding figure for the respondents who perceive the market as equally difficult to penetrate is considerably lower – only 35%. Therefore, it may be concluded that the cultural dimension also plays a role in businesses' perceptions of how difficult the market is to penetrate. The finding that 33% do not perceive the RU market as more challenging could at least to some extent be a reflection of the low cultural and linguistic awareness among DK businesses established in the previously mentioned *ELISE* and *ELAN* studies (cf. *Chapter 2*).

Figure 3-3 – Exporters' future expectations towards the Russian market



3.2.4 Future expectations

The exporters' short-term expectations are divided - 38% stated they expected an increase in their sales in the near future, whereas almost half of the respondents (49%) did not expect any growth in the short run, and another 13% were uncertain, see *Figure 3-3 A)*. Long-term expectations are much more optimistic and uniform, with as many as 91% expecting their sales in Russia to grow**.**

The significant difference between the short- and long-term expectations to the market is most likely a reflection of the current global financial crisis that has a negative impact on export activity in general. However, the prevalent long-term optimism clearly indicates that DK exporters essentially perceive the market as attractive and are eager to capitalise on its opportunities.

The above findings are additionally supported by the respondents' assessment of the market's overall importance in the future. *Figure 3-3 B)* shows that as many as 81% believe it will gain more importance for their businesses.

3.3 Cross-tab analysis of exporters' perceptions

The above figures revealed that the exporters' perceptions of some aspects are not entirely uniform (cf. *Figure 3-1*). Instead, three dominant answer options account for considerable shares of the sample each. Since one of the initial assumptions is that variables like *size* and *industry* (and presumably *membership of DI* vs. *non-membership*) play a role in exporters' linguistic approaches, it is relevant to scrutinize how such variables are reflected in their perceptions of the RU market.

3.3.1 Perceptions among DI-members vs. non-members

The study sample represents 53 members of DI and 26 non-members. Despite the difference in their respective numbers of respondents, both groups may be said to be well-represented.

<u>Market attractiveness & DI-members vs. non-members</u>

It appears from *Figure 3-4 A)* that the differences in the two groups' perceptions of the RU market's attractiveness in general are not very significant. However, there is a trend indicating that DI-members are slightly more likely to assess the market's attractiveness as *"Very high"* and *"High"*, whereas non-members are more likely to rate it as *"Not especially high"* and *"Not high"*.

Market importance & DI-members vs. non-members

A similar trend is observed in the two groups' assessments of the market's relative importance - larger proportions of DI-members assess the market as either *"very important"* (30% vs. 27%) or *"important"* (28% vs. 15%), whereas non-members are more likely to assess it as *"of moderate importance"* (35% vs. 23%) or as *"not particularly important"* (15% vs. 9%), see *Figure 3-4 B).*

Difficulty of entry & DI-members vs. non-members

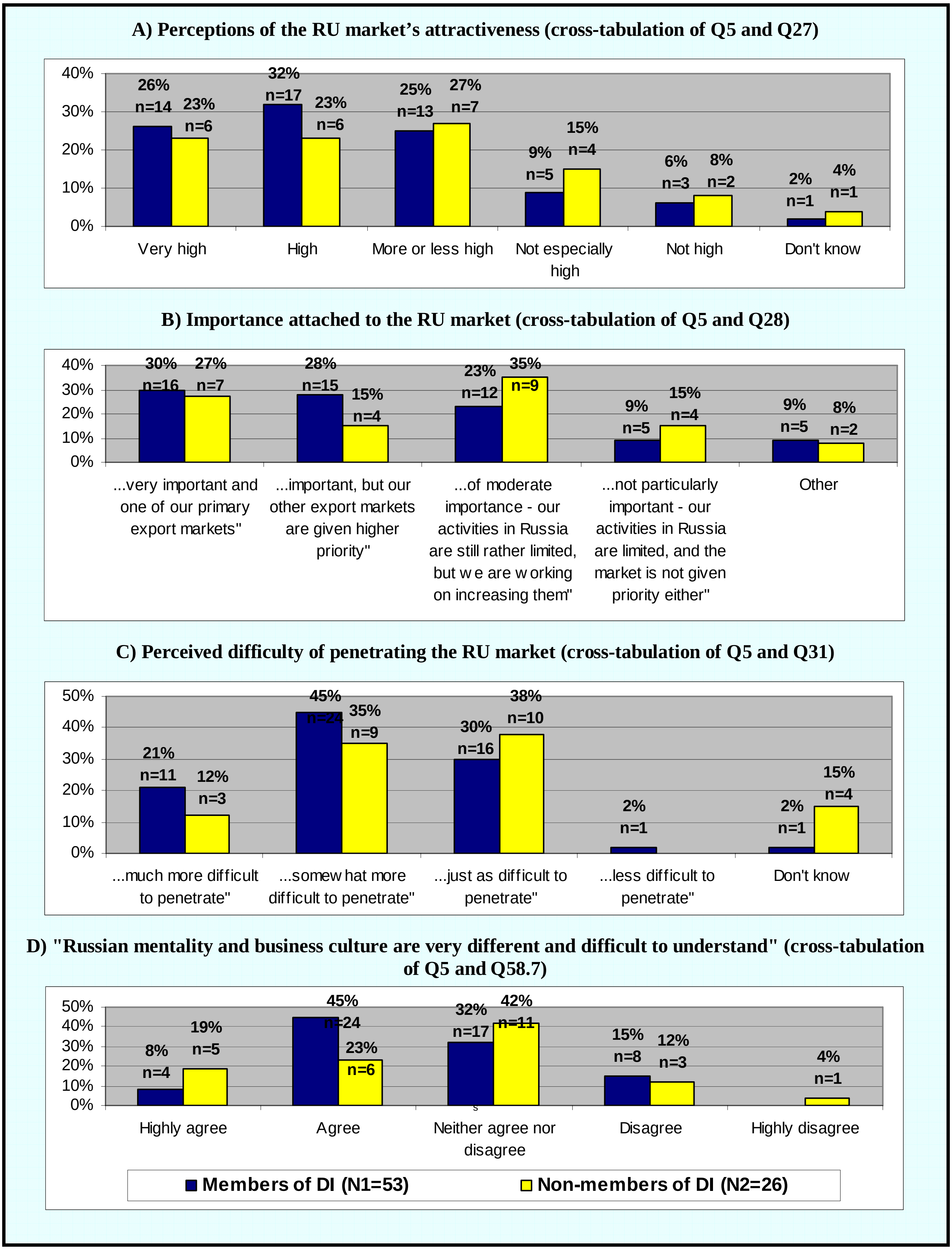
As regards the two groups' perceptions of how difficult the RU market is to enter compared to other FMs, the differences are more significant than in the two previous cases, see *Figure 3-4 C).* Notably larger shares of DI-members perceive the market as either *"much more difficult"* (21% vs. 12%) or *"somewhat more difficult"* to enter (45% vs. 35%), whereas non-members are somewhat more likely to perceive it as *"just as difficult to penetrate"* (38% vs. 30%).

When confronted with the statement that RU mentality and business culture are very different and difficult to understand, a larger share of DI-members than non-members either highly agreed or agreed – in aggregate 53% vs. 42% respectively, *Figure 3-4 D).* It should be noted though that almost every fifth non-member (19%) said they *"Highly agreed"* as opposed to the 8% among DI-members.

3.3.2 Perceptions dependent on the size variable

The study sample was divided into seven size categories dependent on the number of employees: *1-9*, *10-19*, *20-49*, *50-99*, *100-199*, *200-499*, and *500+* employees. All size categories are represented almost equally well, except from the *10-19* category, see *Figure 3-5.* Thus, the figures for the latter may not be entirely representative.

Figure 3-4 – Perceptions among DI-members vs. non-members



<u>Market attractiveness & size</u>

It appears that <u>all</u> large companies with 500+ employees assess the market's attractiveness exclusively positively, i.e. as either *"Very high"* (44%) or *"High"* (56%). Perceptions are more spread across the scale within the other six categories with considerable shares of businesses perceiving the market only as more or less attractive, see *Figure 3-5 A).* Also, the figure shows that the three smallest businesses categories (*1-9, 10-19, 20-49* employees) are the least enthusiastic about the market.

<u>Market importance & size</u>

Similar to the preceding subsection, it appears that large businesses with *500+* employees rate the market exclusively as either *"very important"* (44%) or *"important"* (44%), see *Figure 3-5 B).* The remaining 11% correspond to one respondent who stated that the RU market *was* important to them, but it could not be ranked according to the available answer options in this question (*Q28*). As regards the other size categories, the answers are again rather spread across the scale (with the exception of the *10-19* category, which may be due to the low number of respondents in this category). Businesses employing 50 employees or more appear to be more likely to attach the greatest importance to the market, with the top two assessments *"very important"* and *"important"* accounting for the largest share of businesses in the *50-99* group (67%), followed by the *200-499* (54%) and *100-199* (51%) categories.

<u>Difficulty of entry & size</u>

It appears that the perceptions of how difficult the RU market is to penetrate compared to other markets are rather divided within the 7 size categories, see *Figure 3-5 C).* Only 40% of the *1-9* category perceive the market as either *"much more difficult"* (10%) or *"somewhat more difficult to penetrate"* (30%), which is 20% below the sample average and the smallest share compared to the other size categories. At the same time, this category displays the highest rate of uncertainty – 30% against the sample average of 6%.

Percentage-wise, the *200-499* category has the largest share of businesses perceiving the market as either much more or somewhat more difficult to enter – a total of 91%, followed by the *10-19* (75%), *50-99* (60%), *100-199* (56%), *500+* (55%) and, finally, the *20-49* category (50%). Moreover, all the size categories but the *200-499* category have considerable shares of businesses that find the RU market equally challenging as any other foreign market.

Figure 3-5 - Perceptions of the Russian market correlated with businesses' sizes

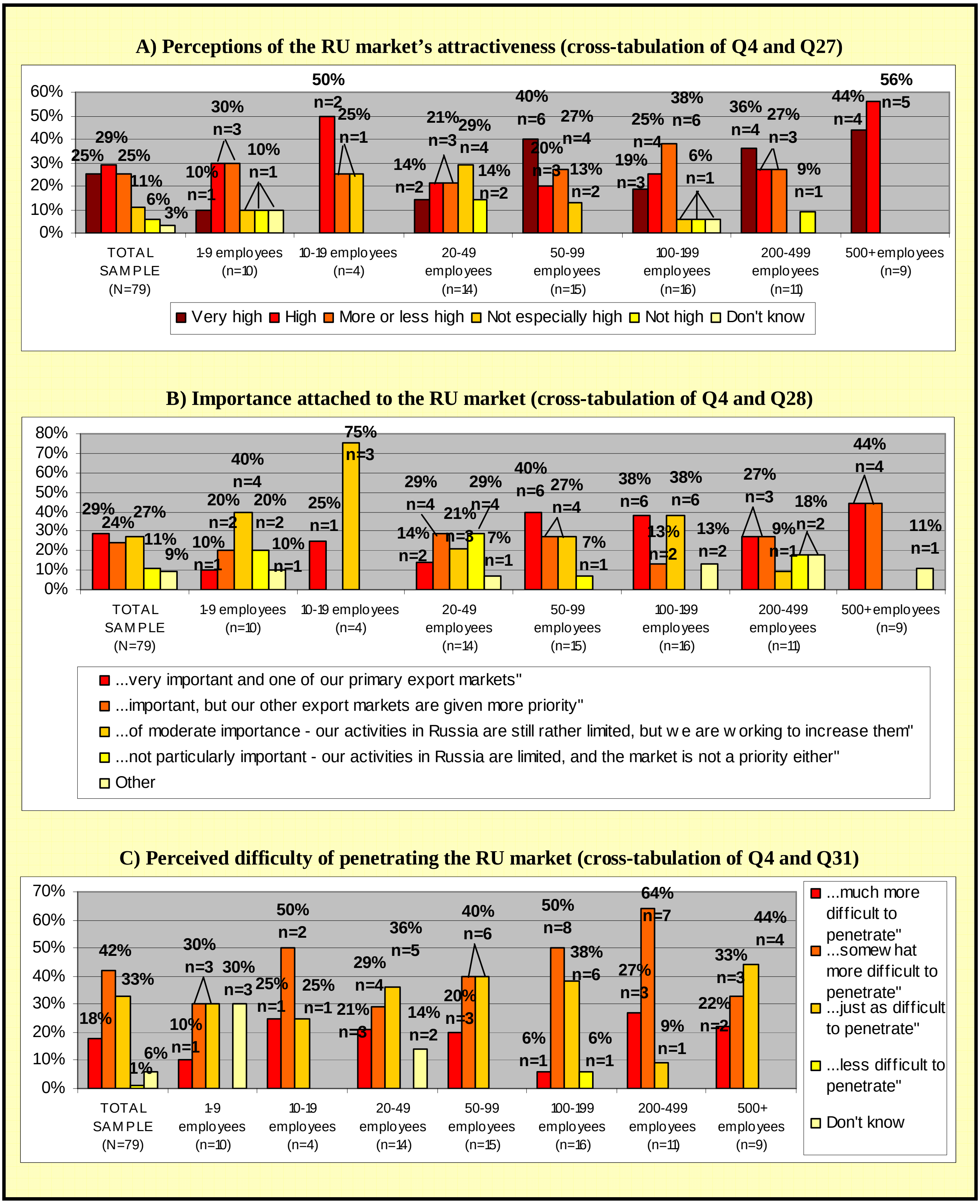


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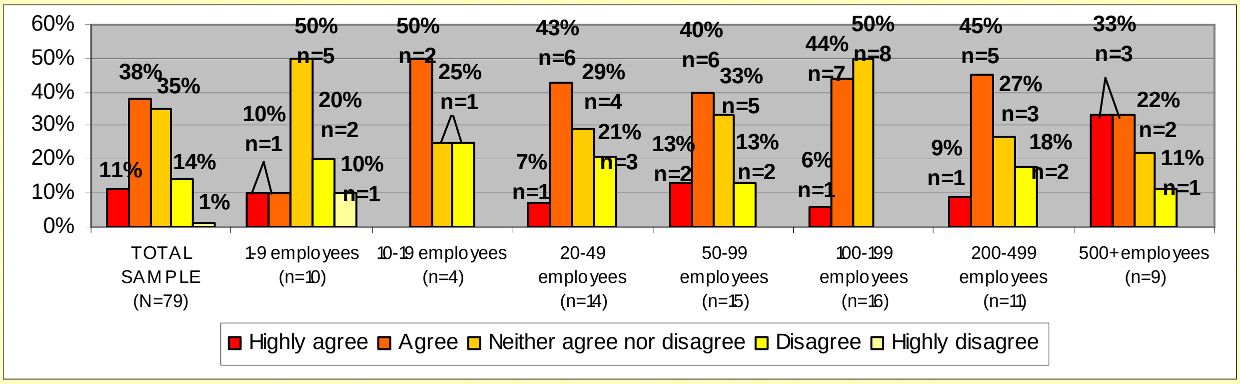
Figure 3-5 continued:

D) Do you agree or disagree with the following statement: "Russian mentality and business culture are very different and difficult to understand"? (cross-tabulation of Q4 and Q58.7)



As to the statement that RU mentality and business culture are very different and difficult to understand, the lowest rate of agreement (*"Highly agree"* and *"Agree"* combined) is found in the *1-9* category (20%), and the highest rate is found in the *500+* category – 66%, see *Figure 3-5 D)*. The trend could be an indication of higher cultural (and presumably linguistic) awareness in large businesses.

3.3.3 Perceptions dependent on the industry variable

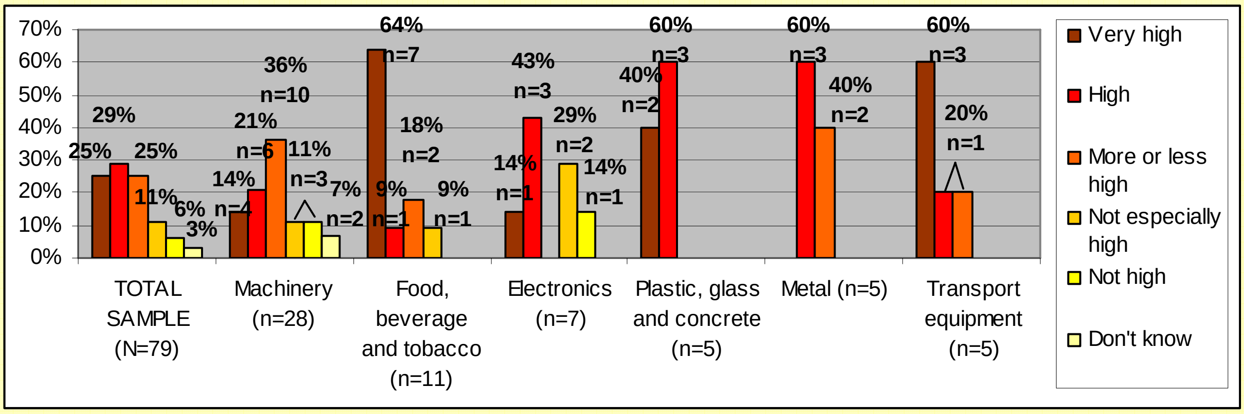
In the following, only industries that are represented by at least 5 respondents are assessed, namely *machinery* (n=28), *food/beverage/tobacco* (n=11), *electronics* (n=7), *metal* (n=5), *plastic/glass/concrete* (n=5), and *transport equipment* (n=5). Obviously, due to the low number of respondents in the majority of the industries, the numbers may not be entirely representative. For more details on how the sample was broken down by industry see *Appendix I, Industry variable.*

<u>Market attractiveness & industry</u>

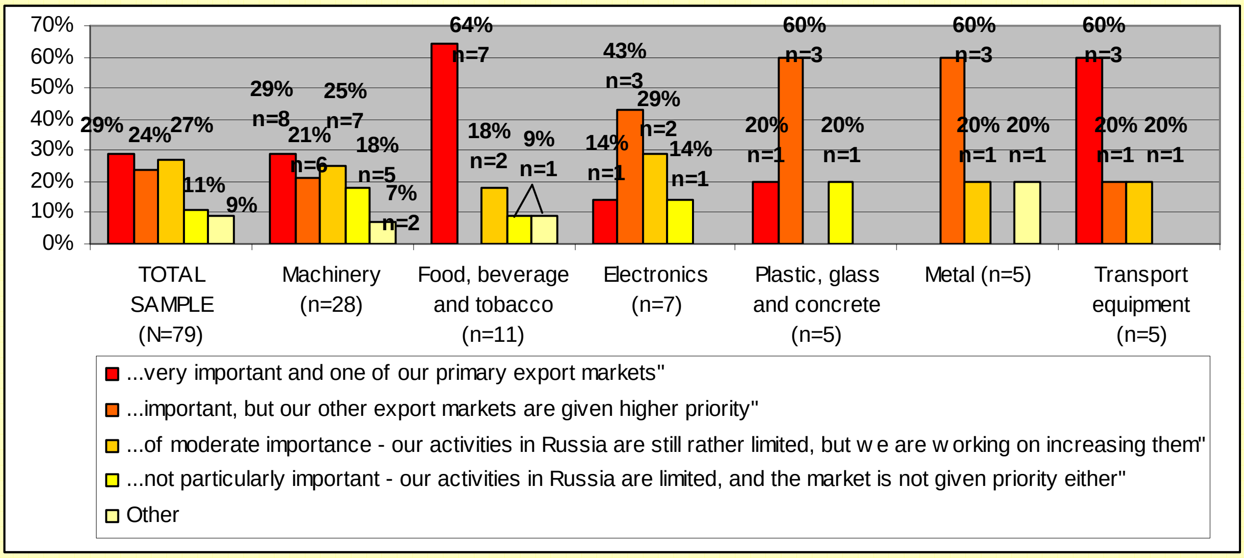
Figure 3-6 A) reveals that businesses operating in the *plastic/glass/concrete* industry assess the market most positively, solely opting for the answers *"Very high"* and *"High"*, 40% and 60% respectively. It should be noted, though, that, despite being in the same industry, these businesses' products are very dissimilar ranging from office supplies and packaging to building materials.

Figure 3-6 – Perceptions of the Russian market by industry

A) Perceptions of the RU market's attractiveness (cross-tabulation of Q8 and Q27)



B) Importance attached to the RU market (cross-tabulation of Q8 and Q28)



C) Perceived difficulty of penetrating the RU market (cross-tabulation of Q8 and Q31)

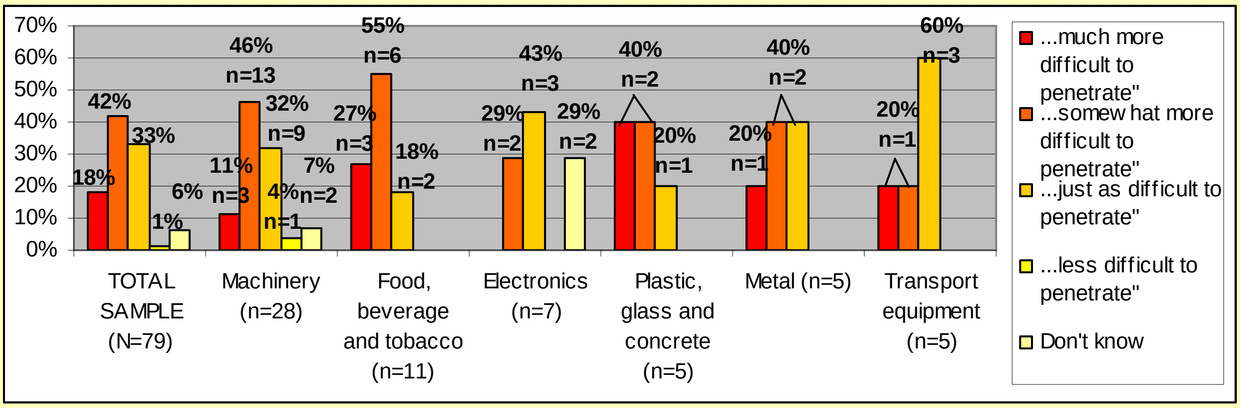
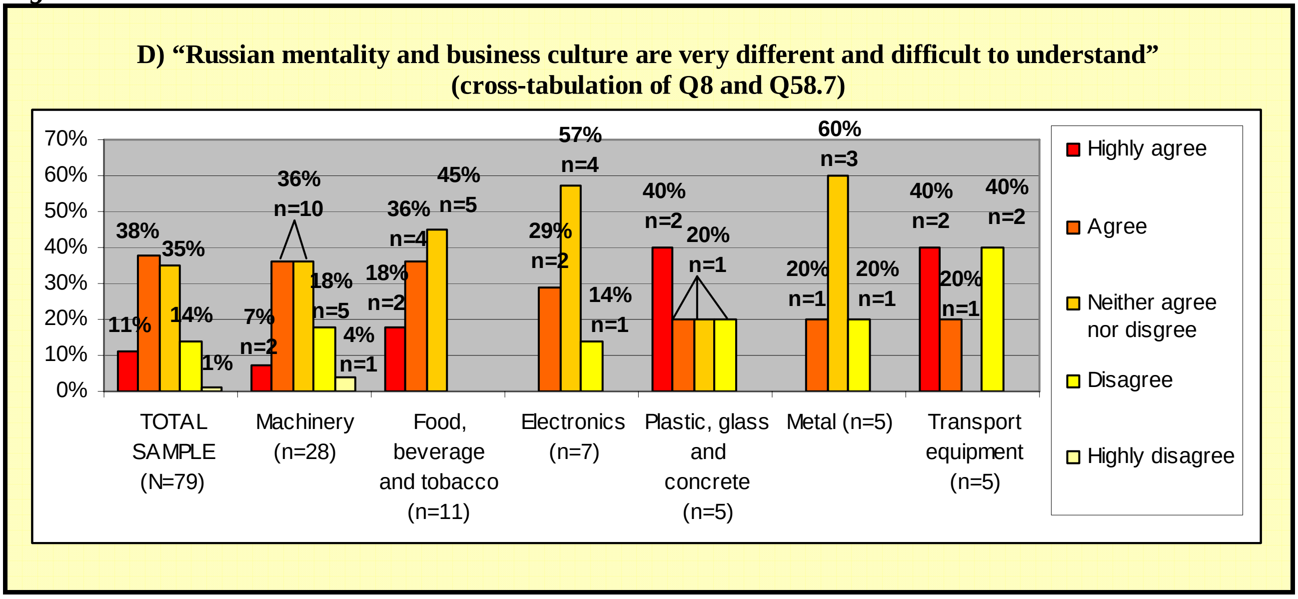


Figure 3-6 continued:



Businesses in the *food/beverage/tobacco* along with *transport equipment* and *metal* industries also perceive the market more positively than the total sample on average – 82%, 80%, and 60%, respectively, opted for one of the two most positive ratings. The *machinery* industry with only 35% assessing the RU market's attractiveness as either *"Very high"* or *"High"* is significantly below the sample average of 54%, which makes it the only industry where the two most positive ratings in aggregate are not opted for by a majority.

In the *electronics* industry, perceptions are divided the most - a little more than half of these businesses (57%) assess the market's attractiveness as "*Very high*" or *"High"*, whereas a little less than half rate it negatively as either *"Not especially high"* or *"Not high"* (43%).

Market importance & industry

In the individual industries, businesses' assessments of the RU market's importance largely follow their assessments of its attractiveness, see *Figure 3-6 B)*. It is especially businesses operating in the *transport equipment*, *plastic/glass/concrete*, *food/beverage/tobacco* as well as *metal* industries that prioritize the RU market the most – 80%, 80%, 64%, and 60%, respectively, assess the market as either *"very important"* or *"important"*. And as noted in subsection 3.2.2**,** all the respondents who opted for the answer *"Other"* stated that the market *was* important to them. Consequently, as many as 8 of the 11 businesses in the *food/beverage/tobacco* and 4 of the 5 businesses in the *metal* industry see the market as either *"very important"* or *"important"*.

The corresponding number for the businesses in the *electronics* industry is 57% (columns 1 and 2 combined), which is slightly above the sample average of 53%. The distribution of perceptions in the *machinery* industry resembles the total sample's pattern.

Difficulty of entry & industry

The only industry where the RU market is not perceived as *"much more difficult to penetrate"* is the *electronics* industry, see *Figure 3-6 C)*. As many as 43% perceive the market as equally difficult to penetrate as any other market, 29% find it *"somewhat more difficult"*, and another 29% were uncertain.

The second smallest share of businesses assessing the RU market as more challenging is found in the *transport equipment* industry, where a total of 40% opted for either of the first two answers, but the remaining 60% stated the market is equally challenging as other markets.

In the remaining four industries, the majority of businesses find that, compared to other foreign markets, the RU market is either *"much more"* or *"somewhat more"* challenging – in aggregate, 82% in the *food/beverage/tobacco*, 80% in the *plastic/glass/concrete*, 60% in the *metal*, and 57% in the *machinery* industry.

As to the statement that RU mentality and business culture are difficult to understand, the only industry where none of the respondents disagree with it is the *food/beverage/tobacco* industry – more than half (54%) either highly agree or agree with the statement, and the rest neither agree nor disagree, see *Figure 3-6 D)*. This may be said to maintain the above finding that this industry has the largest share of businesses perceiving the RU market as more challenging compared to other markets (82%) and the lowest share assessing it as equally challenging.

The agreement rate is also high among businesses in the *plastic/glass/concrete* industry as well as in the *transport equipment* industry – 60% in both cases. The majority in the *electronics* and *metal* industries, 57% and 60% respectively, neither agreed nor agreed with the statement, and only 29% and 20%, respectively, agreed.

3.4 Summary and conclusions

The brief objective review of the RU market indicated that Russia is an attractive market with great potential and growth opportunities. This assessment was confirmed by the exporters' predominantly positive perceptions of the FM's attractiveness across the sample and the finding that most of the exporters attach significant importance to the market and expect it to gain even more importance in the future. It was also found that almost half of the respondents find that RU mentality and business culture are very different and difficult to understand, and that the RU market is perceived as either much more or somewhat more difficult to penetrate than other FMs by a majority. These findings indicate that many exporters face a number of unique challenges on this FM and that the linguistic and cultural dimensions may well account for some of them. In the light of these findings, it is reasonable to expect that, across the sample, the exporters will tend to rely on the *adaptation strategy,* involving extensive use of Russian in their communication with the FM, which should be reflected in their demand for RU skills. *Chapters 4 and 5* will scrutinise whether this actually is the case.

The cross-tab analysis scrutinized how the variables *DI-membership vs. non-membership, size,* and *industry* are reflected in the exporters' perceptions and revealed a number of trends. Compared with non-members, DI-members appear to be slightly more likely to rate the market more positively and attach greater importance to it, and notably more likely to see it as more challenging to enter than other FMs and to agree that RU mentality and business culture are difficult to understand. This may be an indication of higher cultural (and presumably also linguistic) awareness among DI-members, which may be due to DI's knowledge pool, various market-specific initiatives and networks available to them.

As to the *size* variable, an especially strong relationship was revealed in the *500+* category – these businesses rate the market's attractiveness exclusively as *"Very high"* or *"High"* and assess it as *"very important"* or *"important"*. An immediate explanation could be the already mentioned link between a business's size and its resources. Obviously, large companies with more resources at their disposal are much better equipped to overcome trade barriers, including the linguistic and cultural ones, compete with other foreign and domestic businesses on the RU market and, thus, to capitalise on the market's opportunities. Unlike large companies, smaller businesses may often be held back by various obstacles (including the language barrier, as Erhvervs- og Boligstyrelsen (2004) indicated), which, in turn, may make the market's opportunities appear less attractive. Moreover, the analysis indicated that larger businesses are more likely to perceive the market as more challenging to enter compared to other FMs and to agree that RU mentality and business culture are very different and difficult to understand. This may also be an indication of larger businesses possessing higher cultural and linguistic awareness.

It was also found that there are differences in perceptions across industries. However, it was more difficult to establish unambiguous relationships between the individual industries and businesses’ perceptions (like in the case of the *500+ employees* category above).

As a result, it may be concluded that the variables *DI-membership, size,* and *industry* may play a role in the exporters’ perceptions of and attitudes towards the RU market. It is reasonable to assume that the identified differences in perceptions may affect their approaches to the language aspects of their RU operations, and that the three variables will similarly be reflected in such approaches. For example, it may be expected that businesses that perceive the market’s attractiveness more positively, attach more importance to it and find it more difficult to penetrate than other FMs will be more likely to employ the *adaptation language strategy*. A case in point could be DI-members as opposed to non-members or businesses with 500+ employees as opposed to businesses in other size categories, etc. Whether the identified differences in perceptions and their correlations with the selected variables are actually in evidence in the exporters’ FL strategies will be verified in *Chapter 5*.

It should be noted that the correlation of the exporters’ perceptions with the three variables did not always produce strong and unambiguous relationships, which is reflected in the answers being more or less spread across the entire scale within some of the categories. This could indicate that other factors than the ones scrutinized in this paper come into play.

4. Danish exporters' linguistic awareness and needs for Russian skills

This chapter is the second step towards the verification of *Proposition 1* set out in the introduction. The objectives of the chapter are:

- *to assess exporters' overall linguistic awareness in terms of availability of FL communication strategies and the value they attach to formal FL skills,*
- *to assess exporters' current and future needs for Russian skills,*
- *to identify the most frequent communication situations exporters face with their RU relations and the FL skills they use,* and
- *to correlate exporters' needs for and use of Russian skills with their perceptions of the market established in Chapter 3.*

4.1 Availability of FL communication strategies

Possession of formalised FL communication strategies aimed at supporting businesses' foreign trade may be seen as the ultimate indicator of high linguistic awareness. The sample's linguistic awareness in relation to their FMs in general and the RU market in particular is illustrated in *Figure 4-1*. It appears that slightly more than every fifth exporter (22%) claims always to consider the FL aspects of their international operations, and every third (34%) - to some extent, but not for all their FMs. Thus, in aggregate more than half of the sample display at least some degree of linguistic awareness as regards their export activities, whereas 29% admit they never consider FL strategies and simply rely on *ELF* when communicating internationally, see *Figure 4-1 A).*

Interestingly, despite the fact that 22% of the respondents stated always to consider the FL aspects of their international activities, only one business (1%) claimed to have a formalised communication strategy for the RU market, and 18% stated they had some general guidelines for managing the FL aspects of their RU operations, see *Figure 4-1 B).* A large majority of 67% of the sample stated they did not plan their FL communication with the RU market strategically at all.

Some of the comments given by the 11 respondents who opted for the answer *"Other"* in *Figure 4-1 B)* indicate some linguistic awareness and planning in their handling of RU operations. For instance, one of the exporters notes that their marketing material is translated into Russian by their agents in Russia, whereas another points out that they have an employee proficient in Russian who is a key person in the business's communication with the market, and a third respondent notes that they get help from a native speaker of Russian who works for their partners in France. Obviously, these businesses acknowledge the need for RU skills and at least some degree of linguistic adaptation to their RU relations. However, five other of the 11 respondents explicitly stated they only use English when communicating with their RU relations. In this connection, the way one of the respondents worded his comment was particularly interesting. His reply to *Q36* was:

"Our current operations are confined to English-speaking businesses in Russia"[2].

Firstly, the comment suggests that, if the exporter's RU relations are proficient in English, there is no need for FL strategies, which illustrates the trend discussed in *Chapter 2* that English is not perceived as a true FL by the DK corporate world any more, but rather as a universal language everyone is expected to master. And secondly, the word "confined" - whether the respondent chose it deliberately or not – really hits the bull's eye as regards DK businesses' widespread (and arguably blind) reliance on English as the *lingua franca* of international trade that may result in limited market and growth opportunities.

It is possible that a business may not find it necessary to embed FL aspects into their export strategies for a particular FM if the business's communication with the market is infrequent (e.g. due to insignificant or infrequent sales to the FM). But this is hardly the case for the DK exporters to Russia participating in this study, as more than half (52%) claim to communicate with their RU customers often, and another 29% - from time to time (*Q40*).

4.2 Value attached to formal FL qualifications and FL training for staff

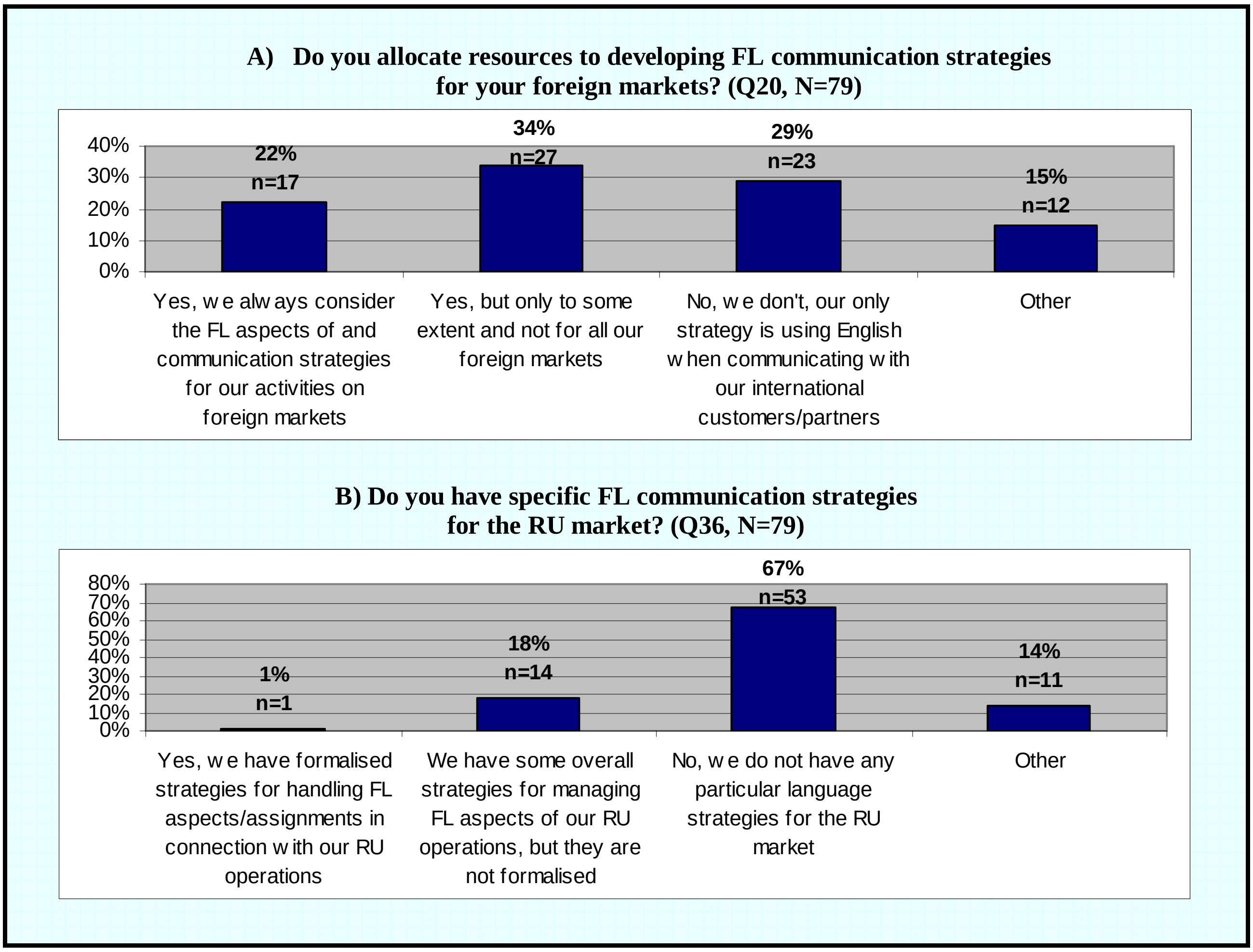
FL training for staff is an important part of a business's language management, and, if available, is another indication of high linguistic awareness and recognition of FLs' value.

In general, as regards the importance DK exporters attach to formal FL qualifications, roughly every third exporter (34%) finds it important that their FL communication is managed by linguistically-trained staff, whereas close to half of the respondents (46%) do not, see *Figure 4-2 A)***.** The majority of the 16 exporters who opted for the answer *"Other"* noted that FL skills

[2] NB: My translation and emphasis. The original comment in Danish read: "Vi er p.t. begrænset til samarbejde med engelsktalende russiske virksomheder".

were important and an advantage, but whether the skills were acquired through an actual language education or otherwise (e.g. a stay abroad) was immaterial.

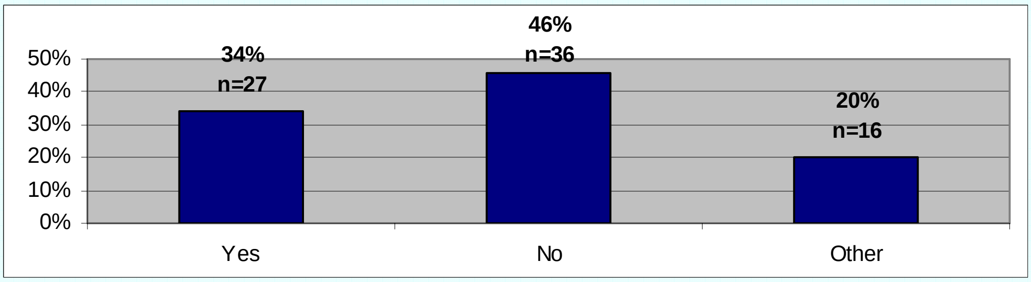
Figure 4-1 – Availability of FL communication strategies for foreign markets in general and for the RU market specifically



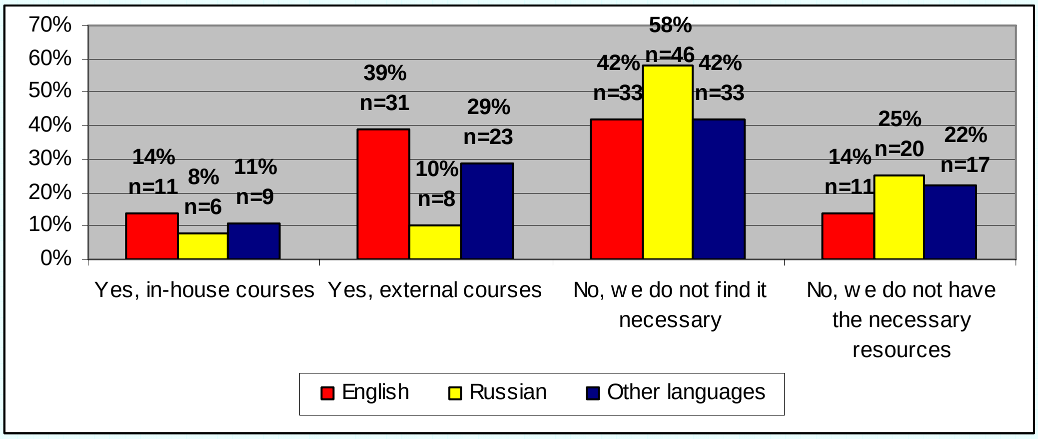
Several exporters stated that, since their engineers often were in direct contact with foreign customers, they were expected to have certain fluency in FLs and primarily in English. These findings are consistent with the conclusions in Verstraete-Hansen (2008) suggesting that *a)* graduates whose main subject of study is languages are rarely perceived as a source of valuable and profit-generating knowledge in DK businesses, *b)* proficiency in English is often taken for granted (i.e. everyone is expected to be able to communicate in English), and *c)* if anything, skills in other FLs are merely perceived as "bonus skills" and less valuable than other business- and product-specific skills (*ibid,* p. 41). Therefore, it is not surprising that the most frequent reply to the question dealing with FL training of staff was *"No, we do not find it necessary"*, as regards both English, Russian and other FLs, see *Figure 4-2 B)*. In businesses that do offer FL training, English appears to have a clear priority. Thus, 14% claim to offer in-house training in English and 39% offer external courses, whereas the corresponding figures for Russian are notably lower – 8% and 10%, respectively. Moreover, the shares of exporters finding RU training either unnecessary or impossible due to a lack of resources are larger than in the case of both English and other FLs. It should be noted, though, that the way the question was worded did not render it possible to establish whether the respondents find FL training unnecessary because they do not attach value to the FL skills in question, or because their current needs are met and they do not require additional skills.

Figure 4-2 – Importance of formal FL skills in FL communication and language training for staff

A) Is it important that the staff taking care of your FL communication are linguistically trained (possess formal FL qualifications)? (Q21, N=79)



B) Do you invest in improving your staff's FL skills? (Q57, N=79)



NB: Q57 is a multiple-choice question, thus, the same businesses may be represented in several answer categories

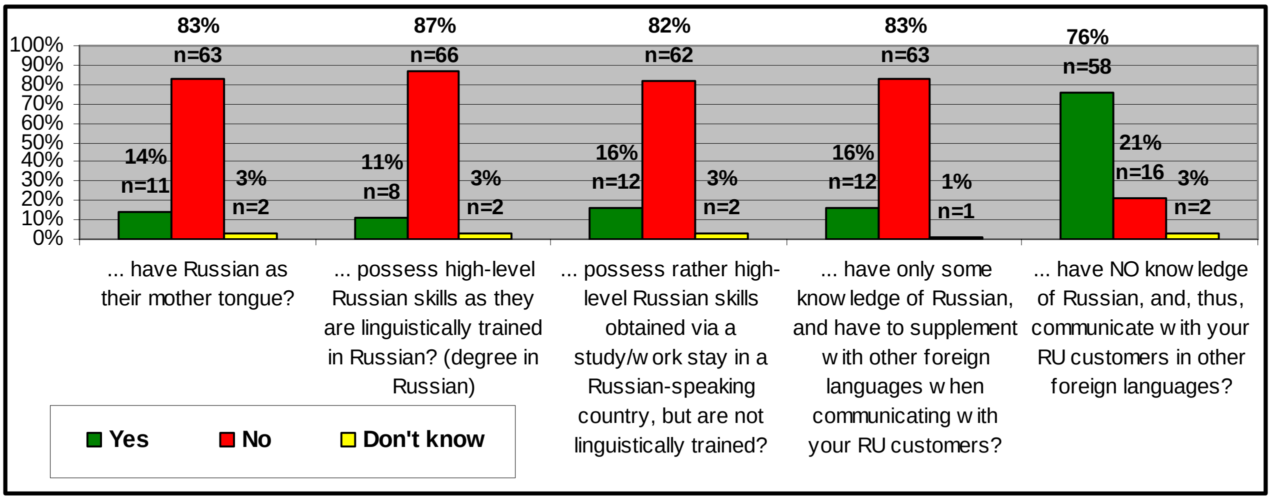
4.3 Exporters' needs for RU skills

4.3.1 Current availability of in-house RU skills

Figure 4-3 illustrates the type of in-house RU skills currently available across the sample. What immediately stands out is the large shares of businesses (over 80%) opting for the answer *"No"* in the first four questions, and *"Yes"* (76%) in the last one, which indicates that a vast majority of exporters do not possess own RU skills. Only 14% employ native speakers, 11% have linguistically-trained staff with RU skills, and another 16% have staff with a different (non-linguistic) educational background who are proficient in Russian.

It appears striking that as many as 76% of the exporters state their staff have *"no knowledge of Russian"* at all, especially in the light of their positive perceptions of the RU market's attractiveness and importance and their high expectations towards it established in *Chapter 3*. It should be noted, though, that *Q46* is a multiple-choice question, and, thus, businesses whose staff dealing with the RU market includes both native speakers and employees without RU skills contribute to this percentage, even though they do possess RU skills. In fact, RU skills of some sort are available in 11 of the 58 businesses in the last green column in *Figure 4-3*. Seven of the 11 exporters, though, have only *"some knowledge of Russian"*, but the remaining four have high-level RU skills. As a result, the number of businesses without any RU skills whatsoever is 47 (58-11=47), i.e. 62% of the sample.

Figure 4-3 – "Do your staff in Denmark in charge of the communication with the RU market…" (Q46, N=76)



NB: Multiple answers were possible. The total number of responses to this question was 76.

4.3.2 Most frequent communication situations and FL skills used

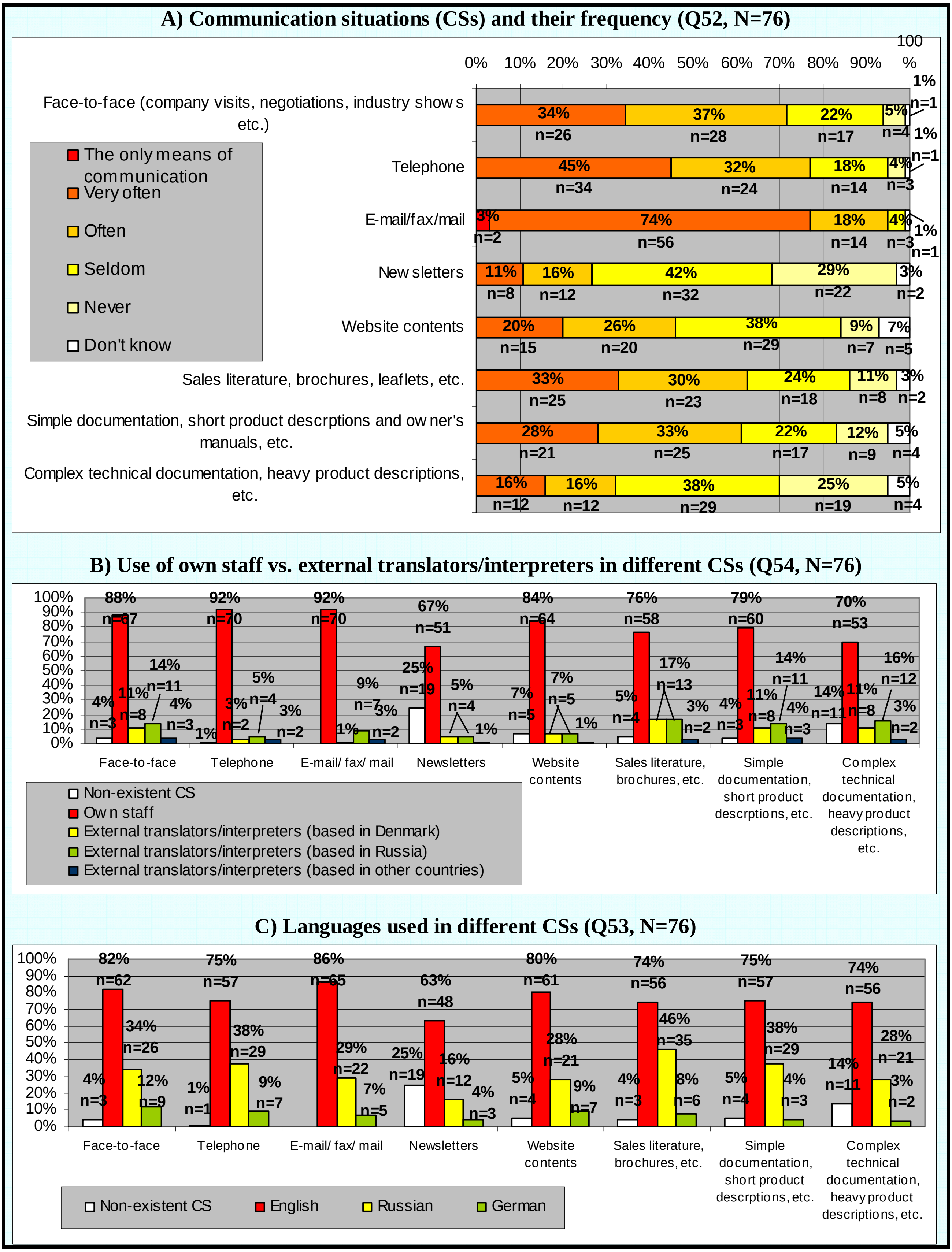
In the questionnaire, communication situations (CSs) were divided into eight categories ranging from personal face-to-face communication and e-mail to complex technical documentation. It appears from *Figure 4-4 A)* that, if the different CSs were to be listed in order of priority based on their frequency, the list for the total sample would look as follows:

1. E-mail (MOST FREQUENT)
2. Phone conversations
3. Face-to-face communication
4. Sales literature
5. Simple documentation
6. Website
7. Complex technical documentation
8. Newsletters (LEAST FREQUENT)

Figure 4-4 B) shows that both written and spoken communication is primarily taken care of by businesses' own staff. As to the use of external expertise in RU, the respondents stated to use both professional translators/interpreters based in Denmark and in Russia, and primarily in connection with more formal written communication, e.g. sales literature (DK- and RU-based translators are both used by 17% of the sample), complex technical documentation (DK-based translators are used by 11% and RU-based translators - by 16%), and simple documentation (DK-based translators are used by 11%, and RU-based translators - by 14%). Moreover, DK- and RU-based interpreters are used in face-to-face communication by 11% and 14% respectively. It may be concluded that reliance on external expertise in Russian in general is not widespread among DK exporters.

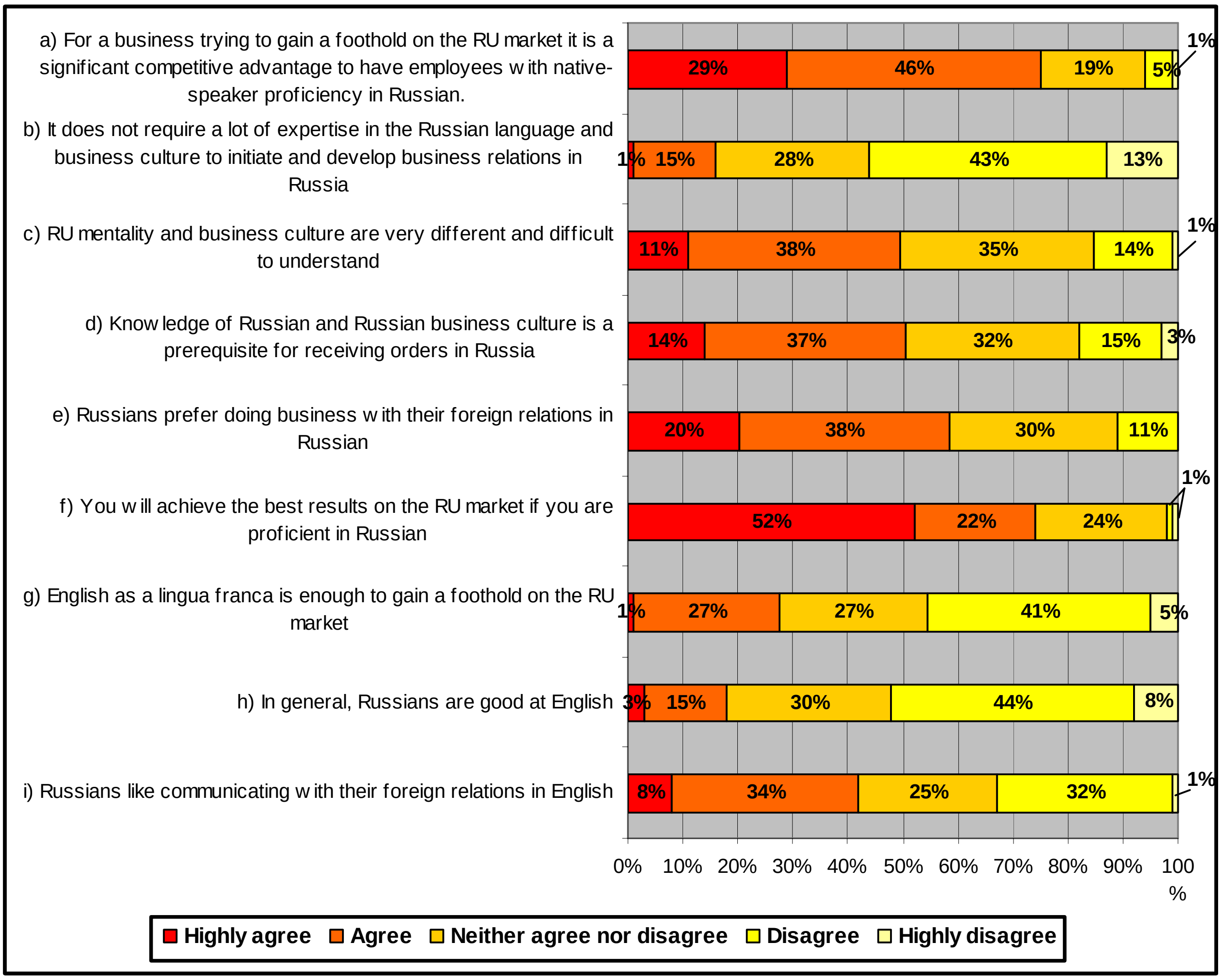
Finally, *Figure 4-4* C) reveals how predominant the position of English is in the exporters' communication with the RU market as opposed to the use of the local language, despite the fact that Russia is not a traditionally strong user of English. The "universal" language is extensively used both in written and spoken communication at different formality levels. Thus, across the sample, the share of respondents relying on English in any of the eight CSs ranges between as many as 74% and 86%, except from communication via newsletters, where English is used by 63%. The latter is, however, not due to a higher percentage of businesses using Russian, but

Figure 4-4 - Communication situations and FL skills used



NB:Q53 and Q54 are multiple-choice questions, so the same respondents may be represented in several answer options rather to the fact that as many as 25% do not use newsletters in their communication with RU relations at all. The corresponding figures for Russian are significantly lower and do not even reach 50% in any of the eight CSs. Reliance on German skills may be said to be rather insignificant. It should also be noted that none of the respondents use German as the sole means of communication with their RU relations, but rather as a supplementary language to English and/or Russian. These findings are interesting to see in the light of the businesses' perceptions of how useful English and Russian skills actually are on the RU market, see *Figure 4-5.*

Figure 4-5 - Based on your business's experience on the Russian market, do you agree or disagree with the following statements? (Q58, N=79)



NB: The darker the colour, the higher the degree of agreement

It appears that only 18% of the sample either highly agree or agree with the statement that Russians are good at English, and as many as 52% either highly disagree or disagree with it (*h*). Nevertheless, 42% of the respondents have experienced that Russians like communicating with their foreign relations in English (*i*). However, 58% of businesses state that, when it comes to doing business with their foreign relations, Russians prefer Russian (*e*) (only 11% disagree). Moreover, 51% even believe that the knowledge of Russian and the Russian business culture is a precondition for gaining orders on the market (*d)*. The highest percentage of businesses highly agreeing with a particular statement amounting to as many as 52% of the sample was expressed in relation to statement *f),* claiming that proficiency in Russian is crucial for achieving the best results on the market. Another 22% said they agreed, thus the total agreement rate is 74%. Moreover, only 16% find that initiating and developing business relations in Russia does not require much expertise in the RU language and business culture (*b),* and only 28% believe that English as a *lingua franca* is enough for gaining a foothold on the market (*g).*

Thus, there is evidence that the majority of the respondents, in fact, realize the importance of RU skills and cultural insight for gaining success in Russia and the limitations of English as a *lingua franca* on this particular market. However, as *Figure 4-3* and *Figure 4-4 C)* above suggest, there is a significant gap between this realisation and businesses' actual communication practices.

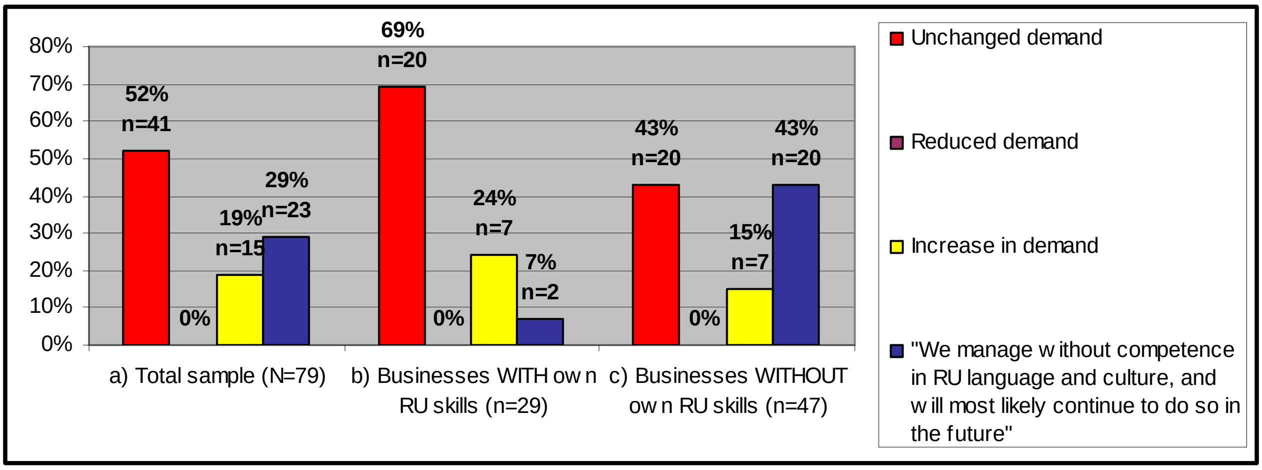
4.3.3 Future demand for RU skills

Future demand for in-house RU skills

Across the sample, almost every fifth exporter (19%) expects their demand for staff with RU skills to grow, 52% assess their needs will stay the same, whereas 29% expect to carry on without in-house RU skills, see *Figure 4-6 a).* Businesses with in-house RU skills are more likely to seek additional RU skills in the future than businesses not possessing such skills – 24% vs. 15%. A majority in both groups, however, do not expect their demand for in-house RU skills to change.

Technically, the 43% of businesses without own RU skills stating their demand will stay unchanged should be included in the blue column together with the 43% stating they will most likely continue managing their RU operations without RU skills. Together with the two businesses that possess RU skills without using them (*Figure 4-6 b*), this would mean that as many as 42 of the 76 respondents who are in direct contact with their RU customers (55%) do not find that staff with RU skills are essential for their performance on the RU market.

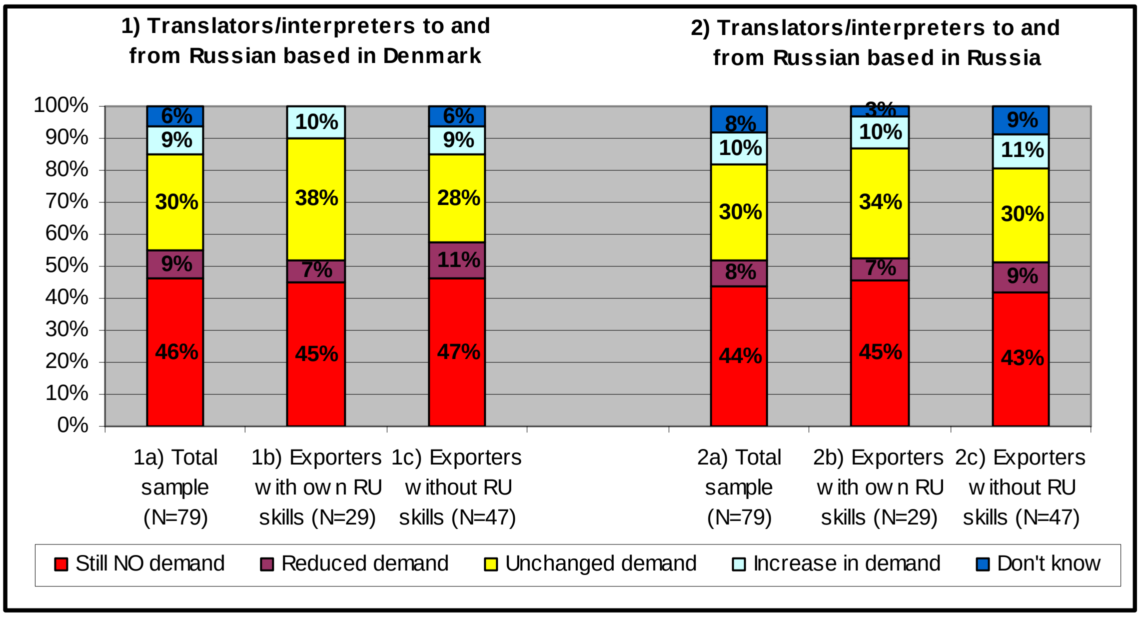
Figure 4-6 – Exporters' anticipated needs for staff with competence in RU language and culture (Q55)



Future demand for external assistance

Figure 4-7 reveals that roughly half of both businesses with and without in-house RU skills use neither translators/interpreters based in DK nor translators/interpreters based in Russia, and do not expect this to change. An average of 30% of the total sample assess their demand for both DK- and RU-based linguistic assistance will stay the same, and only 9-10% expect their needs to increase. However, the modest anticipated increase is offset by a comparable decrease projected by 8-9%.

Figure 4-7 – Exporters' anticipated needs for external assistance (Q56-1, 2)



4.4 Summary and conclusions

This chapter provides evidence that linguistic issues and staff with FLs as their core competence are frequently overlooked by DK businesses. Almost half of the respondents do not find it important that their FL communication is handled by staff with formal FL qualifications, and as many as 67% claim not to give the FL aspects of their RU operations any thought. FL training of existing staff is not common either, and if available, it mainly addresses English skills.

It was revealed that communication via e-mail was the most frequent form of communication across the sample, followed by the more demanding (in terms of FL proficiency) phone and face-to-face communication. Nevertheless, English appeared to be by far the most frequently used FL in all the seven CSs defined in the questionnaire.

In the light of the findings of *Chapter 3* and the fact that Russia is neither an English-speaking country nor a traditionally strong user of English, i.e. reliance on English skills in initiating and consolidating business relations is not always viable, one would expect RU skills to be in high demand among DK exporters to Russia. However, this chapter reveals that businesses' own perceptions of the RU market established in *Chapter 3* do not seem to be reflected in their needs for and use of RU skills. Only 38% stated to have in-house RU skills of some kind, and some of them only have *"some knowledge of Russian"* not sufficient for effective communication with the market. The conclusion is that staff with RU skills are not in overwhelming demand in businesses exporting to Russia, and are not seen as a key asset for their performance there, albeit 74% agree or highly agree that proficiency in Russian is crucial for achieving the best results on the market and only 28% believe that English as a *lingua franca* is enough. This finding is also interesting in the light of the section of *Chapter 3* dealing with DK exporters' performance on the RU market and the major trade barriers they face. One may question whether the high degree of bureaucracy, language and other trade barriers that DK businesses experience may be linked to the pronounced lack of RU skills revealed in this chapter.

As to the future demand, 24% of businesses with in-house RU skills assess they will need more staff proficient in Russian, but the majority (69%) do not expect their demand to change. As to the 47 businesses without own RU skills, only 15% expect their needs for such skills to increase, but the remaining 85% expect to continue doing business with Russia without RU skills. Consequently, a moderate increase in demand for RU skills may be expected in the future.

The current needs for external RU expertise may also be said to be rather modest. As to the future demand for external assistance, hardly any changes may be expected, as 9-10% of both businesses with and without own RU skills assess their needs for external assistance will increase, whereas 8-9% expect them to decrease.

These findings are far from what one would expect to see given the RU market's growth opportunities and anticipated importance in the global economy as well as the exporters' own predominantly positive perceptions of the market and, more importantly, the unique linguistic and cultural challenges they face there. The majority of exporters simply do not expect their projected growth on the RU market to be assisted through better knowledge of the RU language and culture. Presumably, these findings could in part be explained by the previously mentioned *ELISE* and *ELAN* studies and also Verstraete-Hansen (2008), suggesting that DK businesses' cultural and linguistic awareness is very low and so is their appreciation of FL skills other than English, which results in *unrecognized needs* for FL skills (Verstraete-Hansen, 2008). As a consequence of the lacking recognition, businesses may also simply not know *how* to handle professional multilingual communication, as the union *Kommunikation & Sprog* points out (Kommunikation & Sprog, 2009). On the other hand, some of the assessments may also be due to the fact that many businesses' RU operations are not significant. As *Chapter 3* revealed, in aggregate 38% of the 79 respondents perceive their RU activities as limited). And as one of the respondents without in-house RU skills put it, since Russia is a "small" market for them, a full-time position for an employee with RU expertise would not be justified. This suggests that the variable *market importance* may be a major factor in businesses' approaches to the FL aspects of their international activities.

It is understandable that recruiting language specialists for limited export operations would not pass the test of a cost-benefit analysis in many businesses, and would especially be beyond the means of an average SME. On the other hand, based on the suggestions in *Chapter 2,* one could question whether DK exporters in fact would stand a better chance of increasing their market shares in Russia (and other more "exotic" FMs) if they prioritised the knowledge of the customer's language? As discussed in *Chapter 2*, investing in diverse FL skills and integrating them into business planning may facilitate developing successful business relations in FMs and enhance export performance. As a result, the value accrued through such investments is very likely to exceed their cost. Moreover, with the competitive edge provided by the proficiency in FLs, businesses can compete globally on the basis of knowledge and skills rather than simply on the basis of lower costs, as the *ELAN* study also points out.

5. In-depth analysis of Danish exporters' foreign language communication strategies for the Russian market

This chapter is the final step towards the verification of *Propositions 1* and *2* set out in the introduction. The objectives of the chapter are:

- *to scrutinize the exporters' linguistic approaches and how these are linked to the variables introduced in Proposition 2 and the respondents' perceptions revealed in Chapter 3,* and
- *to link the exporters' linguistic approaches with their (perceived) success on the RU market.*

5.2 Exporters' approaches scrutinized – seven linguistic practices identified

In addition to the pre-formulated answer options in the questionnaire (cf. *Figure 4-1*), the respondents were asked to elaborate on how they manage the language aspects of their RU activities. A review of the answers revealed, first and foremost, that the concept of a FL communication strategy aiming at optimising a businesses' export performance on a particular market as such is far from well-established in the DK corporate world. Some of the answers were rather unclear and reflected the individual respondents' own interpretations of what constitutes such strategies, thus providing evidence that FL skills and language strategies are hardly ever integrated into businesses' planning of their export activities. This was further supported by the fact that while some businesses considered their way of addressing the language aspects of their RU operations as either a formalised or a non-formalised FL strategy (cf. *Figure 4-1 B)*), others with an identical approach stated they did not give any particular thought to such issues (cf. *Figure 5-1*).

The initial point of departure for this study was to categorize DK exporters' linguistic approaches as either the *standardization* or *adaptation* strategy (cf. *Proposition 1)*. As the preceding chapters have revealed, English is indeed widely used by a large majority of the respondents in all types of CSs with their RU relations. However, with few exceptions, the respondents' individual answers indicate that such an approach may hardly be seen as an actual *strategy* in the sense that it is <u>not</u> based on any deliberate decision or active planning to communicate with this particular FM in English, but rather simply reflects a *lack* of any such planning, English merely being the "default setting" for international communication.

Due to the above aspects, it was neither reasonable nor possible simply to categorize the respondents' ways of managing the linguistic dimension of their RU operations as either the *standardization* or *adaptation strategy*. Instead, based on a thorough analysis of the respondents' answers, seven different approaches, in the following referred to as *linguistic practices* (LPs), could be identified (cf. *Table 5-1*). The seven LPs reflect different degrees of linguistic responsiveness and adaptation to the RU market, depending on the use of the following four elements that enable linguistic adaptation:

1. in-house RU skills in businesses' HQ,
2. external linguistic expertise,
3. sales offices in Russia where native speakers are employed, and
4. agents in Russia.

Table 5-1 summarizes the key aspects of the seven LPs identified and displays their links to the BCC's linguistic exporter profiles introduced in *Chapter 1* (see also *Appendix II)*. The different shades of green signal the degree of linguistic adaptation – the darker the colour, the higher the degree of adaptation. It should be noted that the LPs #1 and #2 have the same shade, and so do the LPs #3 and #4, as the two practices in each of the two pairs represent a comparable degree of linguistic adaptation and are linked to the same linguistic exporter profiles.

In a nutshell, the LPs #1-#3 require the availability of staff proficient in Russian at businesses' HQ in Denmark, which enables high degrees of linguistic responsiveness and adaptation towards RU relations, whereas the LPs #4-#6 involve varying degrees of linguistic adaptation via the other three elements. The LP #7 does not involve any linguistic adaptation at all, English being the sole means of communication, occasionally supplemented with German.

5.2.1 Distribution of linguistic practices across the sample

Figure 5-1 depicts how widespread the seven LPs are across the sample, and also among businesses stating they have a formalised or non-formalised FL strategy for the RU market (including those who opted for the option *"Other"*) as opposed to those stating not to have any such strategy for the market. It appears that the LP #7 involving no linguistic adaptation at all is the most common approach across the sample (27%). Thus, more than every fourth exporter is a linguistic Opportunist.

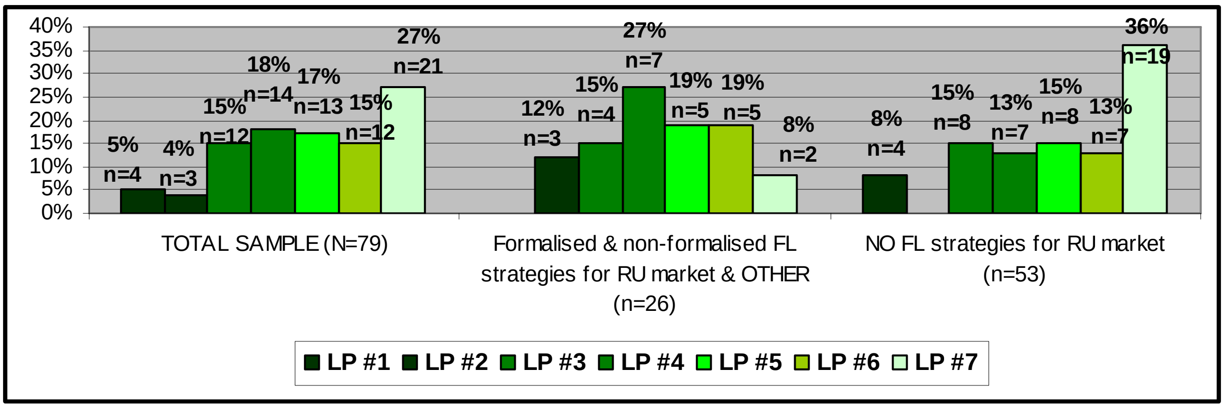
Table 5-1 - Seven linguistic practices and their link to BCC's linguistic exporter profiles

	LINGUISTIC PRACTICES (LPs)	KEY PROS	KEY CONS	BCC PRO FILE
LP #1	- Staff with Russian skills in DK HQ + own sales office/subsidiary in Russia employing locals/native speakers - NO use of external expertise - All communication primarily in Russian	- High degree of linguistic and cultural responsiveness both towards staff in Russia, RU partners and customers - Low risk of miscommunication and cultural clash - Local presence - Best opportunity for pro-active approach in initiating and building new business relations	- Highly cost- and HRM-intensive	ENABLERS
LP #2	- Staff with Russian skills in DK HQ - NO use of external expertise - All communication primarily in Russian	- High degree of linguistic and cultural responsiveness towards RU partners and customers - Low risk of miscommunication and cultural clash - Good opportunity for pro-active approach in initiating and building new business relations	- No local presence - Increased costs of acquiring in-house FL skills	ENABLERS
LP #3	- Staff with Russian and English skills in DK HQ + occasional use of external expertise - Communication in English - where possible, in Russian - where possible and necessary	- Rather high degree of linguistic and cultural responsiveness towards RU partners and customers - Good opportunity for pro-active approach in initiating and building new business relations	- No local presence - Higher risk of miscommunication when staff proficient only in English are involved	ADAPTORS/ ENABLERS
LP #4	- NO staff proficient in Russian in DK HQ, but own sales office in Russia employing locals/native speakers - Usually NO or seldom use of external expertise - DK HQ ←→ RU office - in English, Sales office ←→ RU customers/end users - in Russian	- High degree of linguistic and cultural responsiveness towards RU partners and customers - Local presence	- Low degree of linguistic and cultural responsiveness towards RU staff - Highly cost- and HRM-intensive	ADAPTORS/ ENABLERS
LP #5	- NO staff proficient in Russian + NO use of external expertise + RU agents entrusted with RU communication - Exporter ←→ agent - in English, agent ←→ customers/end users - in Russian	- High degree of linguistic adaptation towards end users - No extra costs of additional staff with FL skills or professional translators/interpreters - Low-cost alternative to own sales office	- NO assurance of quality and commitment on the part of the agent - ELAN: use of agents <u>does not</u> boost sales (CILT, the National Centre for Languages, 2007, p. 54) - Low degree of linguistic and cultural responsiveness towards agents - Limited market opportunities (only agents proficient in English)	DEVELOPERS/ ADAPTORS
LP #6	- NO staff proficient in Russian, but use of external expertise for specific assignments (e.g. negotiations, complex documentation, etc.) - Communication primarily in English, in Russian – occasionally	- Some/limited linguistic adaptation towards RU partners/customers - Professionals in charge of the most important literature, documents, etc.	- Extra costs of hiring professional translators/interpreters - Higher risk of miscommunication and cultural clash when communicating in English - "Interpreters influence meaning" (Usunier (2000), cited in (CILT, the National Centre for Languages, 2007, p. 16)	OPPORTUNISTS/ DEVELOPERS
LP #7	- NO staff proficient in Russian in DK HQ + very rare or NO use of external expertise - All communication primarily in English (rarely supplemented with German)	- No extra costs of additional staff with FL skills or professional translators/interpreters - Standardized sales literature, documentation, etc.	- Very low degree of linguistic and cultural responsiveness towards RU partners and customers - No local presence - Greatest risk of miscommu-nication and cultural clash - Limited market opportunities	OPPORTU-NISTS

The second most widespread approach is the LP #4 (Adaptors/Enablers), used by 18%. Enablers, using the LPs #1 and #2, involving the highest degrees of linguistic responsiveness and adaptation, are the least common ones - 5% and 4%, respectively. The remaining three LPs #3, #5, and #6 are used by almost even shares of businesses each, 15%, 17% and 15%, respectively.

Additionally, it appears that the opportunistic LP #7 is much more common among respondents who stated not to have given the language aspects any thought than among those who displayed at least some degree of linguistic awareness, 36% vs. 8%. Interestingly, the four respondents using the LP #1 are among the former. Thus, businesses with the most adaptive LP, with both staff with RU skills in HQ in Denmark and a local set-up in Russia, state not to have any particular communication strategy or guidelines for the RU market. This can only be interpreted as another indication of how little attention the language aspects of international trade are given and how low the awareness is about such aspects in the DK corporate world.

Figure 5-1 – Distribution of the seven linguistic practices (LPs)



5.2.2 Linguistic practices linked to exporters' perceptions and variables introduced in *Proposition 2*

Figure 5-1 depicts the relationship between the seven identified LPs and such variables as businesses' being *members* vs. *non-members of DI*, *size*, *industry*, the *importance* they attach to the RU market and their perceptions of its *attractiveness*. The most noteworthy findings evident from the figure are outlined below.

<u>*DI-members vs. non-members*</u>

Figure 5-2 A) reveals that, percentage-wise, reliance on LPs #1, #2 and #3 is similar among DI-members and non-members, whereas there are differences in the two groups' use of

the other four LPs. It appears that larger shares of DI-members employ LPs #4 and #5 compared with non-members, 21% vs. 12% and 19% vs. 12%, respectively. Non-members, in return, are more likely than DI-members to employ the most opportunistic LPs #6 and #7, 23% vs. 11% and 31% vs. 25% respectively. Thus, at least in the framework of this study, members of DI appear to be more likely to have higher degrees of linguistic responsiveness and adaptation than non-members, as the least adaptive LPs #6 and #7 in aggregate account for only 36% of the former vs. 54% of the latter.

Size variable

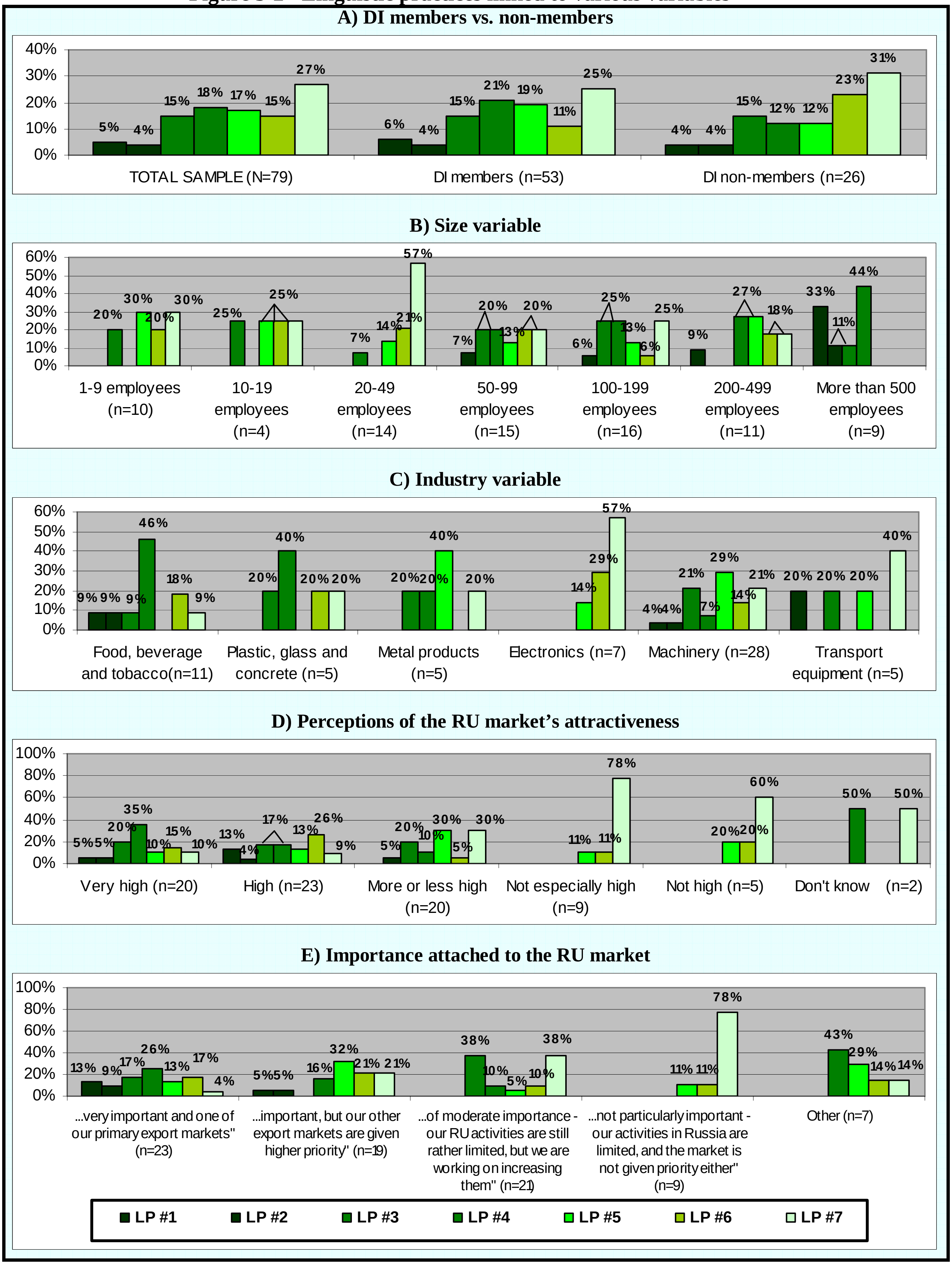
Figure 5-2 B) reveals that the highest degrees of linguistic adaptation are significantly more predominant in the right end of the size scale. Thus, there is a strong relationship between businesses with 500+ employees and the use of the most adaptive LPs #1-#4, and especially the LPs #1 and #4, involving a local set-up in Russia (33% and 44%, respectively). None of the businesses in the *1-9, 10-19* and *20-49 employees* categories has a local set-up in Russia. The most opportunistic LP #7 is most common in the *20-49 employees* category (57%), which may also be linked to the fact that the highest percentage of businesses perceiving the market's attractiveness as either *"Not especially high"* or *"Not high"* was found in this category (cf. *Chapter 3*). The LP #5, involving reliance on agents, is most widespread in the *1-9* (30%), *10-19* (25%), and *200-499 employees* (27%) categories.

The industry variable

Figure 5-2 C) reveals significant differences in the distribution of the seven LPs within the six selected industries. The highest degree of linguistic adaptation is found in the *food/beverage/tobacco* industry, where 46% use the LP #4 (Adaptors/Enablers). In aggregate, as many as 73% have staff proficient in Russian (LPs #1, #2, #3 and #4 combined), and 55% have a local set-up in Russia (LPs #1 and #4 combined). Businesses operating in this industry are least likely to rely on the opportunistic LP #7 (9%). Moreover, none of these businesses, like the businesses in the *plastic/glass/concrete* industry, use the LP #5.

The *electronics* industry displayed the lowest degree of linguistic adaptation – none of the businesses in this category have own staff with RU skills, and as many as 57% are Opportunists using the LP #7, whereas 29% occasionally use professional translators/interpreters for specific tasks (LP #6), and the remaining 14% entrust their RU agents with the communication with their

Figure 5-2 - Linguistic practices linked to various variables



RU customers (LP #5). Businesses exporting transport equipment appear to be the second most likely ones to have an opportunistic approach to language aspects, as 40% use the LP #7.

<u>*Market attractiveness & importance*</u>

Figure 5-2 D) and *E)* show unmistakably that the highest degrees of linguistic adaptation (and at the same time the least reliance on the opportunistic LP #7) are found among respondents who assess the RU market as *"very important and one of our primary markets"* and its attractiveness as *"Very high"* and *"High"*. Businesses that see the RU market as not especially attractive, not attractive and not particularly important are clearly most likely to have an opportunistic approach to the language aspects of their RU operations.

Also, it seems that a deliberate decision to target the market and give it a high priority has an impact on how such aspects are addressed. Thus, businesses that assess the RU market as only of *"moderate importance"*, but are committed to increasing their activities there, display a rather high degree of linguistic responsiveness, primarily employing LP #3 (in-house staff proficient in English and Russian supplemented with external expertise), and are, in fact, more likely to have in-house staff proficient in Russian (LPs #1-#4 combined amount to 48%) than businesses assessing the RU market as *"important, but our other export markets are given higher priority"* (26%).

5.3 Linguistic practices linked to export success

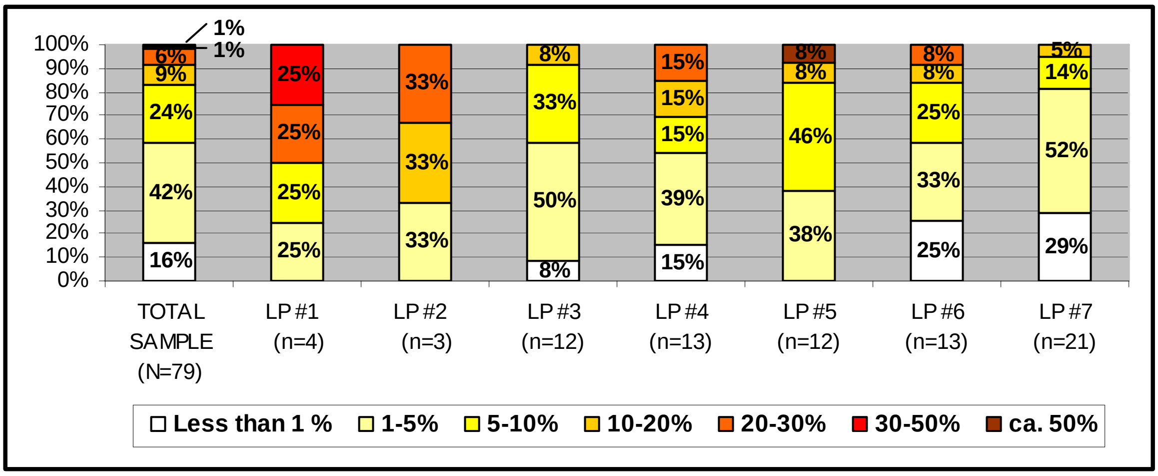
5.3.1 Export sales share

Figure 5-3 depicts RU export sales shares generated by businesses across the sample, and the link between the different LPs used and the sales shares achieved.

As only 7 respondents have been identified as Enablers, using the LPs #1 and #2, it is difficult to establish reliable trends for the two LPs and their link to export shares. It should be noted, however, that none of the 7 businesses have a sales share amounting to less than 1% of their total sales, only two businesses generate between 1-5% of their sales in Russia, another business – between 5-10%, whereas the remaining four have achieved sales shares of at least 10%, with one of them even generating 30-50% of their sales in Russia.

The largest share of businesses generating less than 1% of their sales is found among Opportunists (LP #7) - 29%. Only one of these businesses (5%) has gained a sales share of 10-20%, three businesses (14%) – 5-10%, whereas the majority (52%) only generate 1-5% of their sales in Russia. Thus, the sales shares of as many as 81% of Opportunists do not exceed 5% of their total sales. Opportunists/Developers, linked to the LP #6, have the second highest percentage of businesses generating less than 1% of their sales in Russia (25%).

Figure 5-3 – LPs and businesses' export sales shares generated from the RU market (Q29)



NB: *The darker the colour, the larger the sales share.*
The number of respondents in LP #4 is 13, as one of the respondents declined to disclose information on their RU export sales share

Interestingly, Developers/Adaptors (LP #5), entrusting their agents with all the communication with their RU customers, appear to have achieved significant sales shares on the RU market, despite the fact that the LP #5 is categorized as the third least adaptive linguistic approach. None of these businesses generate less than 1% of their total sales in Russia, and almost half of them (46%) generate sales shares amounting to 5-10%. Even the top scorer in terms of the largest RU sales share amounting to ca. 50% is found among these businesses. As a result, these businesses even outdo businesses relying on the more adaptive LPs #3 and #4 in terms of their RU export sales shares.

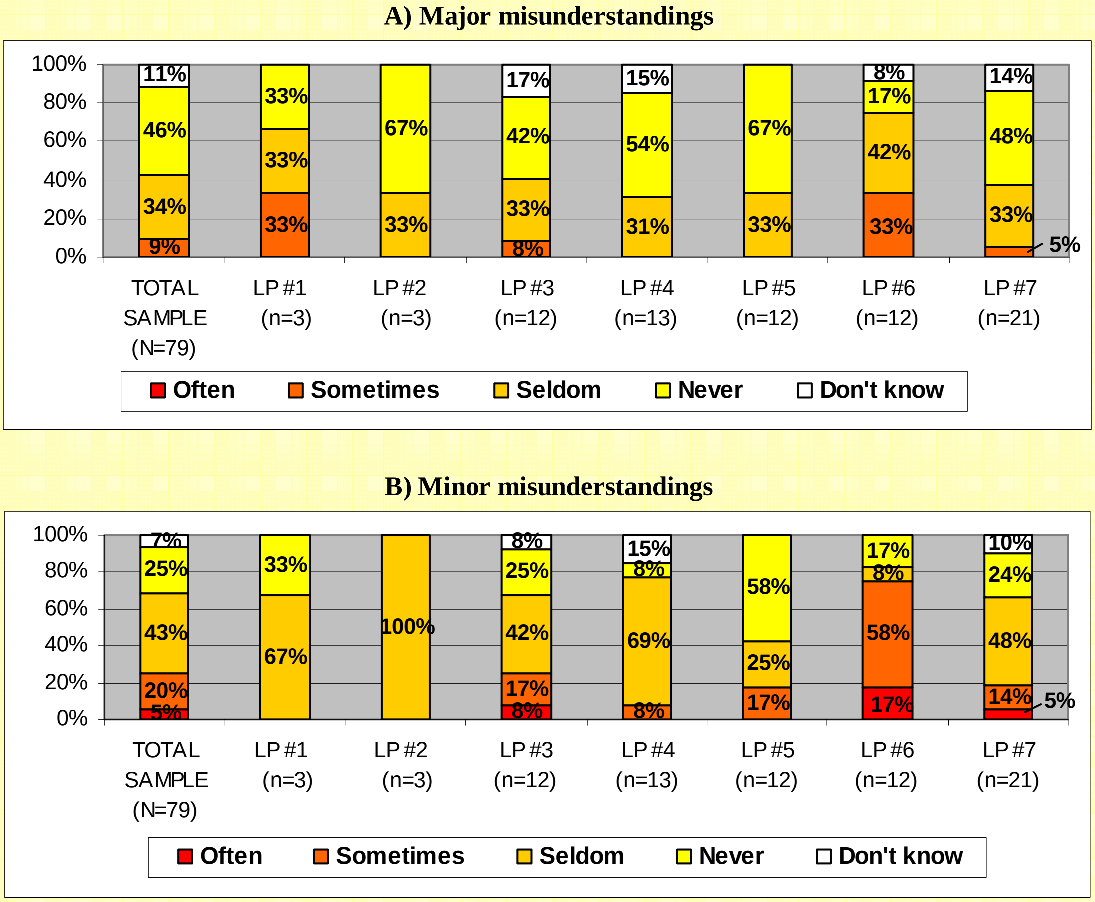
5.3.2 Frequency of miscommunication/misunderstandings

Figure 5-4 depicts the frequency of major and minor misunderstanding experienced by businesses with their RU relations across the sample and dependent on the LPs used. Across the sample, exporters meet with minor misunderstandings more often than with major ones.

It appears that Opportunists/Developers (LP #6), primarily communicating in English and using professional translators/interpreters for specific assignments, experience both major and minor misunderstandings more frequently than other businesses – 33% stated communication with their RU relations *sometimes* leads to major misunderstandings, whereas minor misunderstandings are *sometimes* experienced by 58% and *often* by 17%.

One of the six Enablers (LPs #1 and #2) admitted to *sometimes* meeting with major misunderstandings, two other – to experiencing them only *seldom*, and the remaining three stated they *never* face major misunderstandings. As to minor misunderstandings, five of the seven Enablers said they experience them *seldom*, and the remaining one – *never*.

Figure 5-4 - LPs and the frequency of miscommunication (Q43)



***NB:** The darker the colour, the higher the frequency of miscommunication.*
Three respondents did not answer this question, which is why n=3 in LP #1, n=13 in LP #4, and n=12 in LP #6.

Interestingly, miscommunication is most seldom experienced by Developers/Adaptors relying on the LP #5 (use of agents) – 67% and 58% claim <u>never</u> to experience major or minor misunderstandings, respectively.

Another interesting finding is that Opportunists relying on the LP #7 do not seem to be experiencing communication problems noticeably more often than businesses with more adaptive LPs, as one would expect. In fact, the (perceived) frequency of both major and minor misunderstandings is practically identical for businesses using the LP #7 and those using the LP #3.

5.3.3 Exporters' perceptions of their success

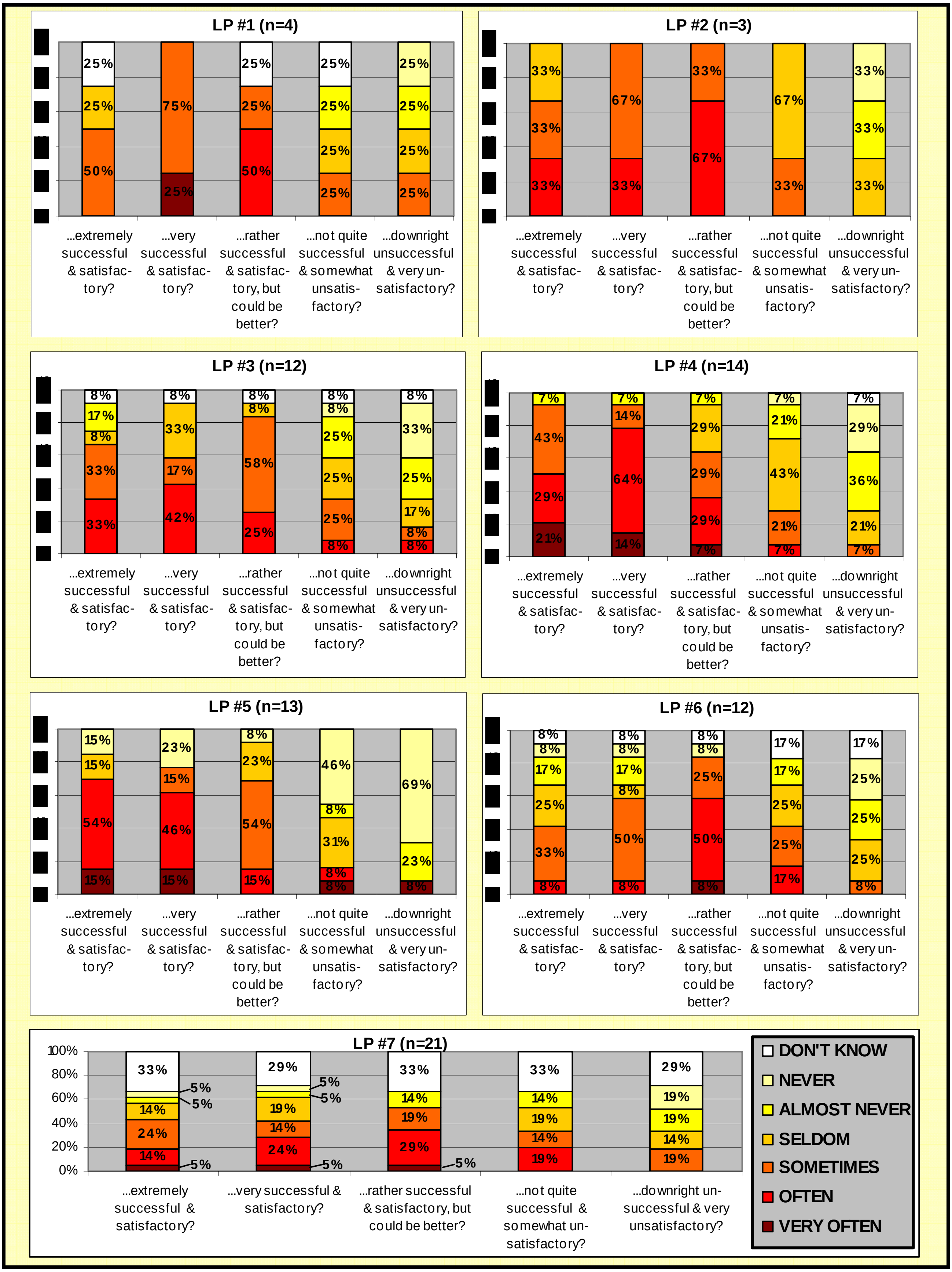
Figure 5-5 depicts businesses' own assessments of how often they achieve different degrees of success, ranging from great success to downright failure, depending on the LP used. It appears that businesses using the LP #5 (agents entrusted with RU communication) assess their RU activities as *"extremely successful and satisfactory"* most often - 54% of them said *"often"*, and another 15% - *"very often"*. In addition, 46% claim their activities are often *"very successful and satisfactory"*, and another 15% even say *"very often"*. At the same time, as many as 69% claim that their RU operations are never a downright failure and 23% say *"almost never"*.

Users of the LP #4 (local set-up in RU, but no staff with RU skills in HQ) are also highly likely to assess their export performance in Russia as either exceptionally or very successful and satisfactory. They rarely find their RU activities unsatisfactory or failed. Businesses relying on the LP #6 most often perceive their RU activities as merely *"rather successful and satisfactory, but could be better"*.

As to the Opportunists relying on the LP #7, considerable shares (every third in almost all the answer options) were unable (or unwilling) to assess the success of their RU operations. But there is a clear indication that only a minority perceive them as exceptionally or very successful. Almost every fifth (19%) often finds them *"not quite successful and somewhat unsatisfactory"*, and sometimes – a downright failure.

As mentioned earlier, the Enablers using the most adaptive LPs #1 and #2 are too few for a reliable trend to be established. However, it should be noted that, contrary to expectations, these businesses do not seem to be noticeably more positive about the success of their RU activities than, for example, the users of the LPs #3, #4 and #5.

Figure 5-5 – How often are your export activities in Russia… (Q33)



5.4 Summary and conclusions

An analysis of the respondents' answers established that the envisaged categorization of their linguistic approaches as either the *standardization* or *adaptation* strategy merely based on whether English vs. Russian were used would not be adequate. It appears that the concept of language or communication strategies as such is still far from being embedded in exporters' planning of export activities. As there is no deliberate decision at the managerial level behind it (with few exceptions), the exporters' use of English can rarely be recognized as a strategy - English is merely a "default setting" for international communication. This is additional evidence that, in the DK corporate world, English skills are taken for granted and that the level of the so-called Anglophone complacency is high and not restricted to Anglophone countries (cf. *Chapter 2).* Surprisingly, even businesses that do adapt most of their communication with the RU market stated they did not possess any FL communication strategies or guidelines for the market, which emphasizes the low awareness of such aspects of international trade.

Based on a thorough review of the respondents' individual answers, four main elements enabling linguistic adaptation to the RU market were identified, i.e. in-house RU skills in HQ, sales offices in Russia, use of external linguistic expertise and local agents. Depending on the elements used, seven different linguistic practices (LPs), as opposed to the word *strategies*, were identified. The seven LPs were linked to the BCC's linguistic exporter profiles, namely Enablers (LPs #1 and #2), Adaptors/Enablers (LPs #3 and #4), Developers/Adaptors (LP #5), Opportunists/Developers (LP #6), and Opportunists (LP #7).

It was found that the most common approach is the LP #7 with no linguistic adaptation at all (27%).

Subsequent analysis revealed differences in the use of different LPs depending on the variables *size*, *industry* and *DI-membership* vs. *non-membership.* Also, the exporters' perceptions of the market's attractiveness and importance appeared to play a role. This confirms the assumption presented in *Chapter 3* that the differences in exporters' perceptions of the RU market depending on the variables *size, industry* and *DI-membership* vs. *non-membership* may be in evidence in their linguistic approaches.

As a result, *Proposition 2* may be said to be confirmed, albeit the relationships between the individual variables and LPs are not all equally strong. The most unambiguous links are observed in relation to the variable *size* – in particular, between large businesses and the most adaptive (and cost-intensive) LPs, – and to the exporters' perceptions of the market's attractiveness and importance. Thus, businesses attaching significant importance to the market and perceiving it as highly attractive proved to be least likely to rely on an opportunistic approach like the LP #7, and to be significantly more likely to have an adaptive communication approach than businesses that assess the market less positively. Consequently, the first part of *Proposition 1*, suggesting that DK exporters are more likely to use the local language rather than English when confronted with an *attractive* FM may be said to be confirmed provided that the exporters in question perceive the FM as attractive for their particular products and have deliberately chosen to focus on this FM.

The unambiguous link between the use of the opportunistic LP #7 and the lowest export sales shares and the finding that none of the businesses using the LPs #1 and #2 have RU export shares accounting for less than 1% of their total sales confirm the second part of *Proposition 1*, i.e. the link between more adaptive LPs and better export performance. Another confirming trend is that only a minority of Opportunists perceive their RU activities as exceptionally or very successful, whereas almost every fifth (19%) often finds them "*not quite successful and somewhat unsatisfactory*", and sometimes – a downright failure. It is certainly a drawback that the questionnaire did not provide an opportunity to establish whether businesses' sales shares were influenced positively as additional staff with RU skills were acquired or as investment in RU training of the existing staff was increased. However, as mentioned earlier, UK businesses that value FL skills were found to be experiencing growth, whereas businesses that do not were found to be losing their market shares (Sidnick, 2004, p. ii). Therefore, it is reasonable to assume that a similar link between greater investment in FL skills and higher (and perhaps even annually increasing) export sales would be applicable to the sample in this study and DK businesses in general. Also, the above-mentioned finding of Sidnick (2004) emphasizes the inadequacy of the monolingual focus on *ELF* in international trade, even when it is used by its native speakers.

Interestingly, Developers/Adaptors relying on agents (LP #5) appear to be very successful on the RU market, both in terms of export sales shares, the frequency of miscommunication (low) and their own perception of how successful their RU activities are, thus even outshining businesses with more adaptive LPs. This finding is especially interesting in the light of the finding of the *ELAN* study that hiring agents (as opposed to employing native speakers, acquiring FL skills and using translators) does not boost sales abroad (CILT, the National Centre for Languages, 2007, p. 54). The positive results of using the LP #5 may be due to the fact that linguistic responsiveness and adaptation are, in fact, high in relation to RU end users, since RU agents are in charge of all the communication. At the same time, hiring agents may provide the benefits of local presence – an aspect perceived as crucial to success on the RU market (cf. *Chapter 3, 3.2.3*) – without the high costs of establishing own sales office, which is especially relevant for SMEs. The greatest drawback of this LP is, obviously, the fact that DK exporters are limited to co-operation with agents proficient in English. Several respondents have pointed out that finding business relations with adequate English skills may be a challenge in Russia (cf. *Figure 4-5 h)*). On the other hand, several respondents have also indicated that, once the right (and English speaking) agents are found, very successful and long-lasting co-operation may be established. Nevertheless, it is reasonable to suggest that availability of in-house RU skills can only boost DK exporters' existing co-operation with agents and further enhance their market opportunities and performance, as they will no longer be limited to working with agents proficient in English. In this connection, it could be interesting to conduct a study of DK exporters' relationship building and management with their foreign agents, focusing on the role of the linguistic and cultural dimensions.

Another remarkable finding is that businesses using the LP #6 (communication primarily in English supplemented with occasional use of professional translators/interpreters) tend to experience both major and minor misunderstandings most frequently. In this connection, it should be noted that a couple of respondents have stated that communication via an interpreter is not always satisfactory and often leads to loss of information. This could be another interesting topic for further research.

6. Final conclusions

On the basis of a sample of 79 DK exporters to Russia, this study has scrutinized how these exporters address the language issues of their operations on this linguistically and culturally distant and challenging market. The initial starting point was Sonja Vandermeeren's *standardization* and *adaptation* communication strategies (Vandermeeren, 1998: 38; cited in Verstraete-Hansen, 2008: 29-30). The study sought to establish how the choice of either of the two strategies is affected by variables *size*, *industry*, *membership* vs. *non-membership of DI* and exporters' perceptions of the RU market's *attractiveness* and *importance*. More importantly, the study sought to establish the relationship between the choice of a communication strategy and export performance.

One of the main findings of the study is the fact that the notion of language or communication strategies as such is still far from being embedded in DK exporters' planning of their export activities. There is a pronounced lack of awareness of language issues, and a deliberate decision at the managerial level to communicate with a particular FM in a particular language using particular language elements is rather the exception than the rule. Contrary to expectations, English proved to be extensively used by DK exporters with their RU relations. However, an analysis of the exporters' considerations in this respect revealed that this use of English can rarely be recognized as a true strategy. Instead, English is merely a "default setting" for international communication, regardless of the FM in question, which indicates a lack of linguistic awareness and language planning and a high degree of "Anglophone complacency" among DK exporters. As a result, attempting to categorize the exporters' linguistic approaches as either the *standardization* or *adaptation* strategies was found inadequate. Instead, based on the use of four main elements enabling linguistic adaptation, seven linguistic practices, LPs #1 – #7, representing different degrees of linguistic and cultural responsiveness and adaptation, were identified.

It was found that the most widespread LP among exporters (27%) was the least adaptive one, i.e. the LP #7/Opportunists, followed by the LP #4/Adaptors/Enablers (local set-up in Russia, but no in-house RU skills in HQ) – 18% and the LP #5/Developers/Adaptors (reliance on agents) – 17%. The most adaptive LPs #1/Enablers (local set-up in Russia and own RU skills in HQ) and #2/Enablers (in-house RU skills in HQ) are used by as few as 5% and 4%, respectively. RU skills are available in 38% of the sample, some of which only have *"some knowledge of Russian"* not adequate for effective communication. These findings stand in stark contrast to the finding that 74% of the sample agree that RU proficiency is crucial for achieving the best results on the market, 51% believe that the knowledge of Russian and the RU business culture is a prerequisite for gaining orders on the market, and only 28% agree that *ELF* is enough. Clearly, there is a gap between these beliefs and the actual communication practices in DK businesses.

Drawing a link between the seven LPs and the variables introduced in *Proposition 2* (including the additional variable *DI-membership* vs. *non-membership*) revealed a number of links. For instance, it was found that non-members of DI were more likely to use the least adaptive LPs #6 and #7 than DI-members. Businesses in the *food/beverage/tobacco* industry proved to have the most adaptive LPs, whereas the *electronics* industry displayed the lowest degree of linguistic adaptation with none of these businesses possessing own staff with RU skills. There is a strong relationship between the most cost- and HRM-intensive LPs #1 and #4 and large businesses (especially with 500+ employees), which is most likely a reflection of the link between size and resources. Correspondingly, small businesses were found to be more likely to rely on the least adaptive (and also least cost-intensive) LPs #6 and #7. All these links are also supported by the findings of *Chapter 3*, e.g. that the RU market is perceived more positively and is attached more importance to by DI-members than non-member, by large businesses than small ones, and by businesses operating in the *food/beverage/tobacco* industry than by those belonging to the *electronics* industry, etc.

Consequently, *Proposition 2* may be said to be confirmed, albeit the links between the individual variables and LPs are not all equally strong. Furthermore, the part of *Proposition 1* suggesting that, when confronted with an attractive FM that is neither an English-speaking country nor a strong user of English, DK exporters are more likely to use the local language may be said to be confirmed <u>provided</u> that the exporter has a clear recognition of the FM's attractiveness coupled with a deliberate decision to target the FM. Obviously, the determination to focus on a particular FM should also be supported by the necessary investments. And, as this study also indicates, investments in linguistic and cultural expertise are often underestimated.

The second part of *Proposition 1*, i.e. the link between a high degree of linguistic adaptation and export success, may also be said to be confirmed, as the study has found that Opportunists relying on the least adaptive LPs are most likely to have the lowest export sales shares (less than 1% or 1-5%), whereas none of the businesses using the most adaptive LPs #1 and #2 have RU export shares accounting for less than 1% of their total sales. Moreover, the former are notably less likely to perceive their RU activities as exceptionally or very successful.

Interestingly, exporters employing RU agents reported high degrees of success, both in terms of export sales shares, low frequency of miscommunication and their own perception of how successful their RU activities are.

Once again, it should be noted that the correlation of the exporters' answers with the different variables did not always produce strong and unambiguous relationships, which could indicate that other factors than the ones scrutinized in this paper come into play. A case in point could be such external factors as the differences in the RU demand for the individual respondents' products, and, perhaps, the differences in the level of competition they face on this particular market and the level of various product-specific trade barriers they have to overcome, as well as other internal or organizational issues. These are, however, outside the scope of this paper.

It should also be noted that this study does not provide compelling evidence that a particular linguistic approach to the RU market is the only right one or superior to others. Instead, it demonstrates that the importance of linguistic and cultural responsiveness and adaptation to a foreign market should not be underestimated, as these elements may facilitate export performance and enhance market opportunities. Perhaps, exporters of niche products possessing unique know-how and not challenged by competition just *yet* may have an advantage that allows them solely to rely on English, as their products "speak for themselves". However, given the dynamics of the modern global economy, such exclusive market positions are rare and hard to maintain indefinitely. Therefore, a well thought out communication approach that recognizes diverse foreign language and intercultural skills as important assets may lend DK exporters the competitive edge they need in order to keep up with and even outshine their competitors on the global marketplace.

Appendix I - The study sample and variables

Sample of participating businesses

The final study sample consists of 79 respondents. Initially, approximately 1500 DK businesses were contacted (primarily by e-mail). The businesses' contact information was obtained from the Danish Embassy in Moscow and Krak - Eniro Denmark A/S (the co-publisher of Denmark's official export directory *Danish Exporters*). According to Krak - Eniro Denmark A/S, apart from the 218 businesses explicitly stating Russia is one of their export markets in the export directory, some businesses only mentioning Eastern Europe as their export area could also have operations in Russia, which together with the contact information provided by the Danish Embassy in Moscow resulted in a list of ca. 1500 potentially relevant businesses.

Only 274 of the contacted businesses had responded, 101 of which were willing to participate in this study. The rest were either not interested (24 businesses), or did not deem themselves relevant as they do not have any direct contact with their Russian customers (e.g. all the communication is managed by an office in a different country like Germany, Poland or Finland) (7 businesses), or stated they neither had business relations with Russia nor planned to expand their activities to this market any time soon (142 companies). Interestingly, among these 142 businesses were also those from the above-mentioned 218 businesses listing Russia as their export market in the directory *Danish Exporters*, whereas more than half of the 101 businesses willing to participate in the study had not explicitly listed Russia as their export market (had only stated Eastern Europe). Obviously, no precise and reliable number of DK exporters to Russia is available.

The electronic questionnaire was sent out to 101 DK exporters and returned by 79. Since the exact number of DK exporters to Russia is not available, it is not possible to calculate the percentage of DK exporters to Russia represented by the 79 respondents in this study.

Questionnaire design

The electronic questionnaire was created by means of the internet-based software provided by **defgo.net®.** The questions were grouped into four sections (see *Appendix III*).

Section 1 gathers general information on the respondents, establishing variables like size, company type, industry, geographic location, and the relative importance of the respondents' different export areas.

Section 2 aims at assessing the respondents' general level of awareness of the linguistic aspects of their activities, e.g. their choice of corporate language, availability of language policies, use of foreign languages, etc.

The focus of *Section 3* is on the Russian market's importance relative to the respondents' other export markets, the exporters' perceptions of the market's attractiveness, the difficulty of penetrating it compared with other FMs, and the exporters' expectations for the future.

Finally, *Section 4* focuses on the way the respondents actually deal with the language issues of their RU activities. It seeks to identify the most typical communication contexts in which the exporters "meet" their RU relations, and the language strategies they employ, e.g. use of FL skills in different communication situations, availability of in-house RU skills, use of external language expertise (translators and interpreters), investing in employees' FL training, etc.

In the majority of the questions, the respondents were presented with a range of pre-formulated answer options. In questions where all the possible answers are difficult to predict, the respondents had the possibility to formulate their own answers. Other questions used semantic differentials based on a several-point scale, e.g. in terms of frequency (a 6-point scale: *Always – Very often – Often – Sometimes – Seldom – Never*) or agreement (a 3-point scale: *Agree – Disagree – Neutral/Don't know/No opinion*).

Definitions of study variables

Size variable

Based on the finding in Verstraete-Hansen (2008) that the variable *size* matters, the study sample was also grouped into several size categories. The classification in this study is more detailed than that in Verstraete-Hansen (2008), as the respondents are grouped in the same way as in the export directory *Danish Exporters*:

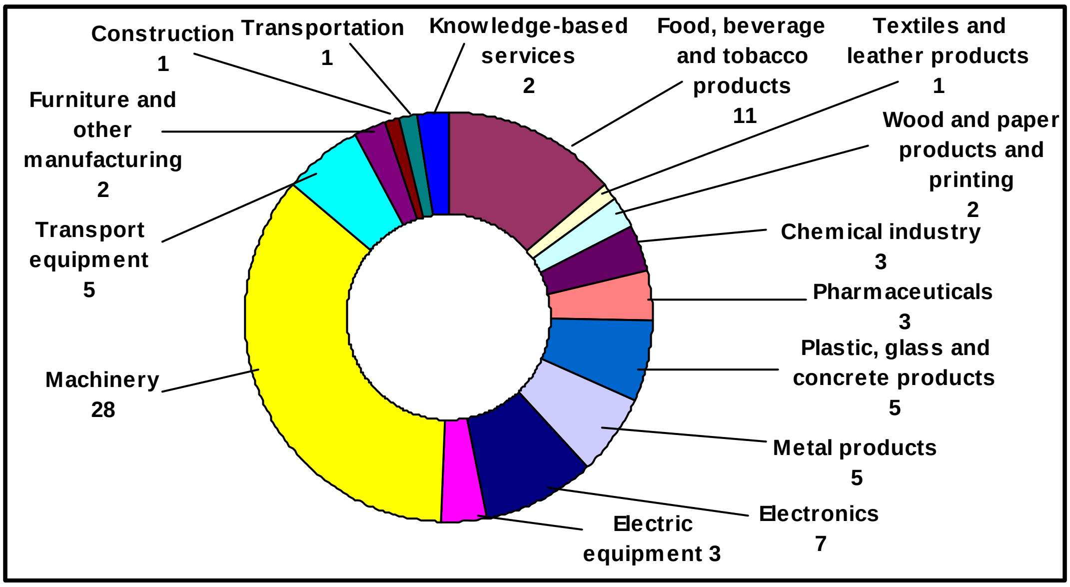
1) 1-9 employees
2) 10-19 employees
3) 20-49 employees
4) 50-99 employees
5) 100-199 employees
6) 200-499
7) More than 500 employees

Industry variable

According to Statistics Denmark's 38-grouping of the registered industries (Danmarks Statistik, 2007, p. 441), the respondents' export products could be grouped into 15 industries (see the figure below). It is important to emphasize that the categorization according to industry is based on the products the respondents export to Russia, even though they do not necessarily produce these products themselves. Thus, for the purpose of this study, businesses that operate in the *trade industry* selling transport equipment or seafood would be categorized as operating in the *transport equipment* and *food industries*, respectively.

Some of the 15 identified industries are represented by as few as one or two businesses**.** In the analysis, only industries represented by at least 5 respondents were assessed, i.e. *machinery* (n=28), *food/beverage/tobacco* (n=11), *electronics* (n=7), *metal* (n=5), *plastic/glass/concrete* (n=5), and *transport equipment* (n=5).

Study sample broken down by industry (Q8, N=79)



Market attractiveness variable

For the purpose of this study, the variable *market attractiveness* is measured by means of the respondents' perceptions of the RU market's attractiveness in relation to their particular products (*Q27)*:

1) Meget høj *[Very high]*
2) Høj *[High]*
3) Nogenlunde høj *[More or less high]*

4) Ikke særlig høj *[Not especially high]*
5) Ikke høj *[Not high]*
6) Ved ikke *[Don't know]*

Market importance variable

For the purpose of this study, the variable *market importance* is measured by means of the respondents' own perceptions of the RU market's relative importance (*Q28)*:

1) Meget vigtigt og vores eneste eksportmarked *[Very important and our only export market]*
2) Meget vigtigt og et af vores primære eksportmarkeder *[Very important and one of our primary export markets]*
3) Vigtigt, men vores andre eskportmarkeder prioriteres højere *[Important, but our other export markets are given higher priority]*
4) Middelvigtigt - vores aktiviteter i Rusland er stadig ret begrænsede, men vi arbejder på at øge dem *[Of moderate importance, our activities in Russia are still rather limited, but we are working on increasing them]*
5) Ikke særlig vigtigt - vores aktiviteter i Rusland er ret begrænsede, og markedet har heller ikke prioritet *[Not particularly important - our export activities in Russia are limited, and the market is not given priority either]*

Appendix II - BCC's Linguistic Exporter Profiles

Linguistic exporter profiles proposed by the British Chambers of Commerce (BCC) in their study on the impact of foreign languages on UK business (Sidnick, 2004, p. ii):

1) *Opportunists* – exporting businesses that simply respond to approaches from foreign customers rather than instigate business development initiatives, most often failing to adapt and localise their offering to their markets and communicating only in English;
2) *Developers* – exporting businesses who are more prepared to adapt their products and services to foreign markets, but remain reactive towards export development and continue to communicate in English;
3) *Adaptors* – exporting businesses that make an effort to adjust their offering to their foreign markets, produce sales literature in foreign languages and have penetrated a wide range of markets;
4) *Enablers* – exporting businesses that are proactive in their approach, consciously choosing markets and adapting their products, services and literature to the markets' needs, and placing a great deal of importance on staff within their businesses having FL skills.

Appendix III - Questionnaire *“Danish exporters’ foreign language strategies for the Russian market”*

0% 0% 100%

1.

Mange tak for din interesse for min spørgeskemaundersøgelse!

Spørgeskemaet består af 4 dele.

Når du har besvaret et spørgsmål, kommer du videre til det næste ved at klikke på "Næste". Du kan ligeledes gå tilbage til et tidligere spørgsmål og rette i din besvarelse ved at trykke på "Tilbage". Du kan dog ikke gå videre i spørgeskemaet uden at have besvaret det aktuelle spørgsmål.

Til sidst skal du trykke på "Afslut", så vil din besvarelse blive registreret og sendt til min indbakke.

Hvis du bliver afbrudt undervejs i besvarelsen, er det muligt at genoptage din besvarelse fra det spørgsmål du er nået til. Du skal bare igen klikke på det link, som du har fået tilsendt med e-mail.

God fornøjelse!

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0% 1% 100%

2. Del 1 - I denne del af spørgeskemaet vil du blive bedt om at besvare nogle generelle spørgsmål om virksomheden, bl.a. om virksomhedens størrelse, branche, geografiske placering osv.

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0% 3% 100%

3. Angiv venligst virksomhedens ID-kode (tilsendt med e-mail) og din stilling i virksomheden: *

Ét svar i hver linje

Virksomhedens ID-kode:

Din stilling:

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0% 5% 100%

4. Virksomhedens størrelse: *

Kun ét svar

- 1-9 ansatte
- 10-19 ansatte
- 20-49 ansatte
- 50-99 ansatte
- 100-199 ansatte

- 200-499 ansatte
- Over 500 ansatte

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0% 6% 100%

5. Er virksomheden medlem af Dansk Industri? *

Kun ét svar

- Ja
- Nej

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Spring:
5=2 GOTO 7

0% 8% 100%

6. Har I deltaget i Dansk Industris initiativ "Own Man in Russia"? *

Kun ét svar

- Ja, det har vi
- Vi har hørt om initiativet, og har overvejet at deltage
- Vi har hørt om initiativet, men har ikke tænkt os at deltage
- Nej, og vi har heller ikke hørt om det
- Notér andet:

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0% 10% 100%

7. Virksomhedstype: *

Kun ét svar

- Produktion a) - industrivirksomhed
- Produktion b) - håndværksvirksomhed
- Handel a) - detailvirksomhed
- Handel b) - engrosvirksomhed
- Service

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0% 11% 100%

8. Hvilken branchehovedafdeling hører virksomheden under? *

Kun ét svar

- Landbrug, skovbrug og fiskeri

◯	Råstofudvinding
◯	Industri A - Føde-, drikke-, og tobaksvareindustri (Slagterier/fiskeindustri/mejerier/bagerier, brødfabrikker/Anden fødevareindustri/Drikkevareindustri/Tobaksindustri)
◯	Industri B - Tekstil- og læderindustri (Tekstil-/Beklædnings-/Læder- og fodtøjsindustri)
◯	Industri C - Træ- og papirindustri, trykkerier
◯	Industri D - Olieraffinaderier mv.
◯	Industri E - Kemisk industri (Fremst. af basiskemikalier/Fremst. af maling og sæbe mv.)
◯	Industri F - Medicinalindustri
◯	Industri G - Plast-, glas- og betonindustri (Plast- og gummiindustri/Glasindustri og keramisk industri/Betonindustri og teglværker)
◯	Industri H - Metalindustri (Fremst. af metal/Metalvareindustri)
◯	Industri I - Elektronikindustri (Fremst. af computere og kommunikationsudstyr mv./Fremst. af andet elektronisk udstyr)
◯	Industri J - Fremst. af elektrisk udstyr (elektriske motorer, ledninger, kabler, husholdningsapparater, lamper mv.)
◯	Industri K - Maskinindustri (Fremst. af motorer, vindmøller, pumper og andre maskiner)
◯	Industri L - Transportmiddelindustri (Fremst. af motorkøretøjer og dele hertil, skibe og andre transportmidler)
◯	Industri M - Møbel og anden industri (Møbelindustri/Fremst. af medicinske instrumenter/Legetøj og anden fremstillingsindustri/Reparation og installation af maskiner og udstyr mv.)
◯	Energiforsyning (El-, gas-, varmeforsyning)
◯	Vandforsyning og renovation (Vandforsyning/Kloak- og rensningsanlæg/Renovation og genbrug/Rensning af jord og grundvand)
◯	Bygge- og anlæg
◯	Handel
◯	Transport
◯	Hoteller og restauranter
◯	Information og kommunikation (Forlag, tv og radio/Telekommunikation/It- og informationstjenester)
◯	Finansiering og forsikring
◯	Ejendomshandel og udlejning
◯	Videnservice (Rådgivning - Advokatvirksomhed, revision og bogføring, virksomhedskonsulenter, arkitekter og rådgivende ingeniører/Forskning og udvikling/Reklame og øvrig erhvervsservice)
◯	Rejsebureauer, rengøring og anden operationel service
◯	Offentlig administration, forsvar og politi
◯	Undervisning
◯	Sundhed og socialvæsen
◯	Kultur, fritid og anden service
◯	Andre serviceydelser
◯	Specificér andet:

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0% 100%

13%

9. Virksomhedens geografiske placering: *

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Kun ét svar

- Nordjylland
- Midt-/Vestjylland
- Østjylland
- Sydjylland
- Fyn
- Lolland-Falster
- Sjælland
- Nordsjælland
- Storkøbenhavn
- Bornholm

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0% 15% 100%

10. Hvor eksportorienteret er virksomheden målt på eksportandel af den samlede omsætning? *

defgo.net

Kun ét svar

- 1-10%
- 11-20%
- 21-30%
- 31-40%
- 41-50%
- 51-60%
- 61-70%
- 71-80%
- 81-90%
- 91-100%

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0% 16% 100%

11. Vurdér venligst betydningen af følgende sprogområder for jeres eksportaktiviteter? *

defgo.net

Kun ét svar i hver linje

	Mest betydelige sprogområde	Ret betydeligt sprogområde	Begrænsede aktiviteter	Ingen aktiviteter	Ved ikke
Engelske					

Nordiske	○	○	○	○	○
Tyske	○	○	○	○	○
Franske	○	○	○	○	○
Spanske	○	○	○	○	○
Portugisiske	○	○	○	○	○
Russiske (inkl. baltiske)	○	○	○	○	○
Kinesiske	○	○	○	○	○
Arabiske	○	○	○	○	○
Andre sprogområder	○	○	○	○	○

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0% 18% 100%

12. Del 2 - Denne del af spørgeskemaet har fokus på virksomhedens sproglige overvejelser GENERELT, såsom virksomhedens valg af arbejdssprog, sprogpolitikker, håndtering af sproglige opgaver på dansk og fremmedsprog osv.

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0% 20% 100%

13. Har virksomheden indført et virksomhedssprog? *

Kun ét svar

defgo.net

- ○ Ja
- ○ Nej

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Spring:
13=2 GOTO 15

0% 21% 100%

14. Jeres virksomhedssprog er... *

Kun ét svar

defgo.net

- ○ ...dansk
- ○ ...engelsk
- ○ ...både dansk og engelsk
- ○ Notér andet:

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0% 23% 100%

15. Har virksomheden en sprogpolitik, dvs. retningslinjer for virksomhedens sprogbrug og sproglige niveau generelt (både internt og eksternt) og især ift. skriftlig kommunikation både på dansk og evt. fremmedsprog? *

defgo.net

Kun ét svar

- Ja, vi har en nedskrevet sprogpolitik
- Vi har nogle generelle retningslinjer for sprogbrug i virksomheden, men de er ikke nedskrevet i form af en decideret sprogpolitik
- Nej, vi har ikke gjort os nogen overvejelser ift. sprogbrug i virksomheden
- Notér andet:

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Spring:
15=2 GOTO 17
15=3 GOTO 18

0% 25% 100%

16. Hvem har formuleret virksomhedens sprogpolitik? *

defgo.net

Kun ét svar

- Direktionen
- Ledelsen
- Kommunikationsafdelingen
- HR-afdelingen
- Notér andet:

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0% 26% 100%

17. Beskriv venligst i hovedtræk, hvad virksomhedens sprogpolitik (eller de ikke formaliserede retningslinjer for sprogbrug) går ud på: *

defgo.net

Gerne flere linjer

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Spring:
17=* GOTO 19

0% 28% 100%

18. Du har svaret, at jeres virksomhed p.t. ikke har nogen sprogpolitik. Har I måske overvejet at formulere sådan en politik (retningslinjer for sprogbrug generelt både eksternt og internt i virksomheden)? *

defgo.net

Kun ét svar

- Ja, det har vi
- Nej, det har vi ikke, fordi...
  (uddyb venligst i feltet til højre)

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0% 30% 100%

19. På hvilke sprog er der adgang til jeres hjemmeside? *

defgo.net

Gerne flere svar

- Dansk
- Engelsk
- Tysk
- Fransk
- Russisk
- Spansk
- Vi har ingen hjemmeside
- Andet/andre sprog, specificér venligst her:

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0% 31% 100%

20. Bruger I ressourcer på at overveje FREMMEDSPROGLIGE kommunikationsstrategier for de enkelte udenlandske markeder (strategier, som ikke nødvendigvis er omfattet af virksomhedens sprogpolitik)? *

defgo.net

Kun ét svar

- Ja, vi overvejer altid de fremmedsproglige aspekter af og kommunikationsstrategier for vores aktiviteter på udenlandske markeder
- Ja, men i begrænset omfang og ikke for alle vores udenlandske aktiviteter
- Nej, det gør vi ikke, vores eneste strategi er, at vi bare bruger engelsk til at kommunikere med alle vores udenlandske kunder/partnere
- Notér andet:

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0% 33% 100%

21. Lægger I vægt på, at de ansatte, som håndterer fremmedsproglig kommunikation med jeres udenlandske kunder/partnere, har en SPROGLIG uddannelse? (uanset sprogkombination) *

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Kun ét svar

- Ja
- Nej
- Notér andet:

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0% 35% 100%

22. Hvor ofte bruger I ekstern ekspertise (oversættelsesbureauer el.lign.) ifm. sproglige opgaver på følgende fremmedsprog? *

defgo.net

Kun ét svar i hver linje

	Meget ofte	Ofte	Af og til	Sjældent	Aldrig	Ved ikke
Engelsk						
Nordiske sprog						
Tysk						
Fransk						
Spansk						
Portugisisk						
Russisk						
Kinesisk						
Arabisk						
Andre sprog						

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0% 36% 100%

23. Del 3 - Denne del af spørgeskemaet indeholder nogle generelle spørgsmål om det russiske marked og dets betydning for jeres virksomhed.

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0% 38% 100%

24. Hvor længe har I opereret på det russiske marked? *

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Kun ét svar

- Under 1 år
- 1-2 år
- 2-5 år
- 5-10 år
- 10-15 år
- 15-20 år
- Over 20 år

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0% 40% 100%

25. Hvordan indleder I typisk relationer med kunder/forretningspartnere i Rusland? *

defgo.net

Kun ét svar i hver linje

	Stort set altid	Meget ofte	Ofte	Af og til	Sjældent	Aldrig
Vi deltager i fælles markedsfremstød arrangeret af f.eks. brancheorganisationer el. lign.	◯	◯	◯	◯	◯	◯
Vi opsøger aktivt kunder/partnere på messer/udstillinger el. lign.	◯	◯	◯	◯	◯	◯
Vi finder potentielle kunder/partnere gennem ambassader/handelskamrer/brancheorganisationer el.lign.	◯	◯	◯	◯	◯	◯
Vi bliver typisk kontaktet af kunden selv	◯	◯	◯	◯	◯	◯
Vi bruger internettet til at finde potentielle kunder/partnere i Rusland	◯	◯	◯	◯	◯	◯
Andet	◯	◯	◯	◯	◯	◯

NOTÉR ANDET:

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0% 41% 100%

26. Specificér venligst de produkter/produkttyper, som I eksporterer til Rusland: *

defgo.net

Gerne flere linjer

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0% 43% 100%

27. Hvordan ville du vurdere Ruslands atraktivitet som afsætningsmarked for netop jeres produkt(er)? *

defgo.net

Kun ét svar

- ◯ Meget høj
- ◯ Høj
- ◯ Nogenlunde høj
- ◯ Ikke særlig høj
- ◯ Ikke høj
- ◯ Ved ikke

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0% 45% 100%

28. Afslut venligst sætningen: "For vores virksomhed er det russiske marked p.t. ... *

defgo.net

Kun ét svar

- ...meget vigtigt og vores eneste eksportmarked"
- ...meget vigtigt og et af vores primære eksportmarkeder"
- ...vigtigt, men vores andre eskportmarkeder prioriteres højere"
- ...middelvigtigt - vores aktiviteter i Rusland er stadig ret begrænsede, men vi arbejder på at øge dem"
- ...ikke særlig vigtigt - vores aktiviteter i Rusland er ret begrænsede, og markedet har heller ikke prioritet"
- Notér andet:

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0% 46% 100%

29. Hvor stor en andel af jeres samlede omsætning kan henføres til eksportaktiviteterne i Rusland? *

defgo.net

Kun ét svar

- 90-100%
- 70-90%
- 50-70%
- ca. 50%
- 30-50%
- 20-30%
- 10-20%
- 5-10%
- 1-5%
- Under 1 %

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0% 48% 100%

30. Forventer I en vækst i omsætningen i Rusland... *

defgo.net

Kun ét svar i hver linje

	Ja	Nej	Ved ikke
...i nærmeste fremtid?			
...på længere sigt?			

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0% 50% 100%

31. Afslut venligst sætningen: "I forhold til andre udenlandske markeder er det russiske marked... *

defgo.net

Kun ét svar

- ...meget sværere at komme ind på"
- ...noget sværere at komme ind på"
- ...lige så svært at komme ind på"
- ...mindre svært at komme ind på"
- Vi har ingen erfaring med andre internationale markeder end det russiske
- Ved ikke

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0% 51% 100%

32. Er det svært at finde medarbejdere med gode kompetencer i russisk? *

defgo.net

Kun ét svar

- Ja
- Nej
- Ved ikke (vi har ikke forsøgt)
- Notér andet:

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0% 53% 100%

33. Hvor ofte er jeres eksportaktiviteter i Rusland ... *

defgo.net

Kun ét svar i hver linje

	Meget ofte	Ofte	Af og til	Sjældent	Næsten aldrig	Aldrig	Ved ikke
...yderst vellykkede og tilfredsstillende							
...meget vellykkede og meget tilfredsstillende							
...rimelig vellykkede og tilfredsstillende, men kunne være endnu bedre							
...ikke helt vellykkede og lidt utilfredsstillende							
...direkte mislykkede og meget utilfredsstillende							

powered by defgo.net® info | Ryd felter | < Tilbage | Næste >

0% 55% 100%

34. Alt i alt, hvad angår det russiske markeds FREMTIDIGE betydning, vil markedet højst sandsynligt... *

defgo.net

Kun ét svar

- ...få STØRRE betydning for virksomheden (ønske/planer om at øge eskporten)
- ...MISTE sin betydning for virksomheden (ønske/planer om at reducere eksporten)
- ...have SAMME betydning som på nuværende tidspunkt (ingen ønske/planer om hverken at øge eller reducere eksporten)
- Notér andet:

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0% 56% 100%

35. Del 4 - Denne sidste del af spørgeskemaet handler UDELUKKENDE om jeres eksportaktiviteter i Rusland og om hvordan I i praksis håndterer sproglige opgaver i forbindelse med disse.

defgo.net

powered by defgo.net® info | Ryd felter | < Tilbage | Næste >

0% 58% 100%

36. Har I bestemte fremmedsproglige kommunikationsstrategier for det RUSSISKE marked? *

defgo.net

Kun ét svar

- Ja, vi har formaliserede strategier for håndtering af de sproglige aspekter/opgaver ifm. vores aktiviteter i Rusland
- Ja, vi har nogle overordnede strategier for at håndtere de sproglige aspekter af vores aktiviteter i Rusland, men de er ikke formaliseret
- Nej, vi har p.t. ingen særlige sproglige strategier for det russiske marked
- Notér andet:

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Spring:
36=3 GOTO 38

0% 60% 100%

37. Beskriv venligst i hovedtræk jeres sproglige strategier for det russiske marked: *

defgo.net

Gerne flere linjer

powered by defgo.net® info | Ryd felter | < Tilbage | Næste >

Spring:
37=* GOTO 39

0% 61% 100%

38. Du har svaret, at I p.t. ikke har nogen sproglige strategier for det russiske marked. Beskriv venligst i hovedtræk, hvordan I bærer jer ad rent sprogligt, når det handler om MUNDTLIG og SKRIFTLIG kommunikation med jeres russiske kunder? *

defgo.net

Gerne flere linjer

powered by defgo.net® info Ryd felter < Tilbage Næste >

0% 63% 100%

39. Afslut venligst sætningen: "Generelt set, hvad angår vores ansattes fremmedsproglige og kulturelle kompetencer og virksomhedens behov taget i betragtning, er vores virksomhed... *

defgo.net

Kun ét svar

- ( ) ...meget godt rustet til at klare sig på det russiske marked"
- ( ) ...godt rustet til at klare sig på det russiske marked"
- ( ) ...nogenlunde godt rustet til at klare sig på det russiske marked"
- ( ) ...dårligt klædt på til at klare sig på det russiske marked"
- ( ) Notér andet:

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0% 65% 100%

40. Har du eller virksomhedens andre ansatte herhjemme i Danmark (haft) direkte kontakt til jeres russiske kunder (f.eks. personlige møder, telefonsamtaler, korrespondance via e-mail eller breve)? *

defgo.net

Kun ét svar

- ( ) Ja, ofte
- ( ) Ja, af og til
- ( ) Ja, men sjældent
- ( ) Nej, aldrig

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Spring:
40=4 GOTO 47

0% 66% 100%

41. Hvor ofte bruger du/I disse sprog til at kommunikere med kunderne i Rusland? *

defgo.net

Kun ét svar i hver linje

	Eneste kommunikations-sprog	Primært	Ofte	Af og til	Sjældent	Aldrig
Dansk	( )	( )	( )	( )	( )	( )
Engelsk	( )	( )	( )	( )	( )	( )
Russisk	( )	( )	( )	( )	( )	( )
Tysk	( )	( )	( )	( )	( )	( )

Andet	○	○	○	○	○	○

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Spring:
41=5/6 GOTO 43

0% 68% 100%

42. Du har angivet, at I kommunikerer på andre sprog end dansk, engelsk, russisk eller tysk med jeres russiske kunder. Specificér venligst: *

Gerne flere linjer

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0% 70% 100%

43. Har I oplevet større eller mindre misforståelser/kommunikationsproblemer med jeres russiske kunder? *

Kun ét svar i hver linje

	Ja, ofte	Ja, af og til	Ja, men sjældent	Nej, aldrig	Ved ikke
Større misforståelser/kommunikationsproblemer	○	○	○	○	○
Mindre misforsåtelser/kommunikationsproblemer	○	○	○	○	○

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0% 71% 100%

44. I hvor høj grad, tror du, at de misforståelser og kommunikationsproblemer, som I har oplevet med jeres russiske kunder, skyldes... *

Kun ét svar i hver linje

	I meget høj grad	I høj grad	I nogen grad	I ringe grad	I ingen grad	Ved ikke
...deres (kundernes) utilstrækkelige engelskkundskaber?	○	○	○	○	○	○
...jeres medarbejderes utilstrækkelige engelskkundskaber?	○	○	○	○	○	○
...jeres medarbejderes utilstrækkelige russiskkundskaber?	○	○	○	○	○	○

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0% 73% 100%

45. Har de ansatte herhjemme i Danmark, som tager sig af kommunikationen med kunderne i Rusland... *(sprogkombinationen er uden betydning i nedenstående svarmuligheder)* *

Kun ét svar i hver linje

	Ja	Nej	Ved ikke
...en ikke-sproglig uddannelse?	○	○	○
...afsluttet en BA i erhvervssprog?	○	○	○
...afsluttet en cand.ling.merc.-uddannelse?	○	○	○
...afsluttet en cand.mag.-uddannelse?	○	○	○

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0% 75% 100%

46. Har de ansatte herhjemme i Danmark, som tager sig af kommunikationen med kunderne i Rusland... *

Kun ét svar i hver linje

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	Ja	Nej	Ved ikke
...russisk som modersmål?	○	○	○
...kompetencer i russisk på ret højt niveau, da de har taget en (erhvervs)sproglig uddannelse i russisk?	○	○	○
...en ikke-sproglig uddannelse, men har kompetencer i russisk på ret højt niveau, som de har erhvervet sig i forbindelse med et studie-/arbejdsophold i et russisktalende land?	○	○	○
...lidt kendskab til russisk, men er nødt til også at anvende andre fremmedsprog når de kommunikerer med jeres russiske kunder?	○	○	○
...ingen kompetencer i russisk, og kommunikerer derfor på andre fremmedsprog med jeres russiske kunder?	○	○	○

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Spring:
46=* GOTO 52

0% 76% 100%

47. Du har angivet, at hverken du eller virksomhedens andre ansatte herhjemme i Danmark har direkte kontakt med jeres russiske kunder. Hvem tager sig så af kommunikationen? *

Kun ét svar

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- ○ Vi sælger via en forhandler/agent i Rusland, som tager sig af al kommunikationen med vores russiske kunder
- ○ Vi har etableret et salgskontor i Rusland, hvor de lokale tager sig af al kommunikationen med vores russiske kunder
- ○ Vi har et salgskontor i et andet land, som tager sig af al kommunikationen med vores russiske kunder
- ○ Vi sælger til det russiske marked via importører, hvorfor vi ingen direkte kontakt har med vores russiske kunder
- ○ Notér andet:

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0% 78% 100%

48. Hvor ligger jeres kontor, som tager sig af kommunikationen med jeres russiske kunder? *

Ét svar i hver linje

Kontorets beliggenhed:

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0% 80% 100%

49. På hvilke sprog kommunikerer I med jeres salgskontor/forhandler/agent/importører, som tager sig af kommunikationen med jeres russiske kunder? *

Kun ét svar i hver linje

	Altid	Oftest	Ret ofte	Af og til	Sjældent	Aldrig
Dansk	○	○	○	○	○	○
Engelsk	○	○	○	○	○	○
Russisk	○	○	○	○	○	○
Tysk	○	○	○	○	○	○
Andet	○	○	○	○	○	○

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0% 81% 100%

50. Du har angivet, at I bruger andre sprog end dansk, engelsk, russisk eller tysk, når I kommunikerer med jeres salgskontor/forhandler/agent/importører ifm. eksport til Rusland. Specificér venligst: *

Ét svar i hver linje

Sprog:

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0% 83% 100%

51. Jeres nuværende behov for EKSTERN assistance i form af tolke/oversættere til og fra RUSSISK ifm. aktiviteterne i Rusland: *

Kun ét svar i hver linje

	Ingen behov	Lille behov	Moderat behov	Stort behov
Tolke/oversættere til og fra russisk bosat i Danmark	○	○	○	○
Tolke/oversættere til og fra russisk bosat i Rusland	○	○	○	○
Tolke/oversættere til og fra russisk bosat i andre lande	○	○	○	○

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0% 85% 100%

52. Hvor ofte benytter I jer af følgende typer kommunikation ifm. jeres

kunder i Rusland (uanset hvilke sprog kommunikationen foregår på)? *

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Kun ét svar i hver linje

	Eneste kommuni-kationsform	Meget ofte	Ofte	Sjældent	Aldrig	Ved ikke
Personlig kontakt (virksomhedsbesøg, forhandlinger, messer, osv.)	○	○	○	○	○	○
Telefonisk kontakt	○	○	○	○	○	○
Kontakt via e-mail/fax/breve	○	○	○	○	○	○
Nyhedsbreve	○	○	○	○	○	○
Indhold på jeres hjemmeside	○	○	○	○	○	○
Salgsmateriale, brochurer, foldere el.lign.	○	○	○	○	○	○
Ukompliceret dokumentation, korte produktbeskrivelser og manualer el.lign.	○	○	○	○	○	○
Kompliceret teknisk dokumentation, tunge produktbeskrivelser el.lign.	○	○	○	○	○	○

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0% 86% 100%

53. Hvilke sprog bruger I typisk ifm. de netop omtalte typer kommunikation med jeres russiske kunder? *

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Gerne flere svar i hver linje

	Ikke-eksisterende kommuni-kationsform	Dansk	Engelsk	Russisk	Tysk	Andet fremmed-sprog
Personlig kontakt (virksomhedsbesøg, forhandlinger, messer, osv.)	☐	☐	☐	☐	☐	☐
Telefonisk kontakt	☐	☐	☐	☐	☐	☐
Kontakt via e-mail/fax/breve	☐	☐	☐	☐	☐	☐
Nyhedsbreve	☐	☐	☐	☐	☐	☐
Indhold på hjemmesiden	☐	☐	☐	☐	☐	☐
Salgsmateriale, brochurer, foldere el.lign.	☐	☐	☐	☐	☐	☐
Ukompliceret dokumentation, korte produktbeskrivelser og manualer el.lign.	☐	☐	☐	☐	☐	☐
Kompliceret teknisk dokumentation, tunge produktbeskrivelser el.lign.	☐	☐	☐	☐	☐	☐

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0% 88% 100%

54. Hvordan løser I typisk de omtalte kommunikationsopgaver ifm. jeres russiske kunder? *

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Gerne flere svar i hver linje

Eksternt - af

	Ikke-eksisterende kommunikationsform	Internt af egne medarbejdere	Eksternt - af oversættere/tolke bosat i Danmark	Eksternt - af oversættere/tolke bosat i Rusland	oversættere/tolke bosat i andre lande
Personlig kontakt (virksomhedsbesøg, forhandlinger, messer, osv.)	☐	☐	☐	☐	☐
Telefonisk kontakt	☐	☐	☐	☐	☐
Kontakt via e-mail/fax/breve	☐	☐	☐	☐	☐
Nyhedsbreve	☐	☐	☐	☐	☐
Indhold på hjemmesiden	☐	☐	☐	☐	☐
Salgsmateriale, brochurer, foldere el.lign.	☐	☐	☐	☐	☐
Ukompliceret dokumentation, korte produktbeskrivelser og manualer el.lign.	☐	☐	☐	☐	☐
Kompliceret teknisk dokumentation, tunge produktbeskrivelser el.lign.	☐	☐	☐	☐	☐

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0% 90% 100%

55. Afslut venligst sætningen: "Vi forventer, at vores fremtidige behov for medarbejdere med kompetencer i russisk sprog og kultur højst sandsynligt... *

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Kun ét svar

- ◯ ...vil være uændret"
- ◯ ...vil være mindre"
- ◯ ...vil være større"
- ◯ Vi klarer os uden kompetencer i russisk sprog og kultur og regner heller ikke med at få brug for dem i fremtiden
- ◯ Ved ikke

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0% 91% 100%

56. Vurdér venligst jeres højst sandsynlige fremtidige behov for EKSTERN bistand i russisk og engelsk ifm. jeres aktiviteter på det RUSSISKE marked (IKKE andre udenlandske markeder): *

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Kun ét svar i hver linje

	Fortsat ingen behov	Reduceret behov	Samme behov som nu	Større behov	Ved ikke
Tolke/oversættere til og fra RUSSISK bosat i					

Danmark	○	○	○	○	○
Tolke/oversættere til og fra RUSSISK bosat i Rusland	○	○	○	○	○
Tolke/oversættere til og fra RUSSISK bosat i andre lande	○	○	○	○	○
Tolke/oversættere til og fra ENGELSK bosat i Danmark	○	○	○	○	○
Tolke/oversættere til og fra ENGELSK bosat i Rusland	○	○	○	○	○
Tolke/oversættere til og fra ENGELSK bosat i andre lande	○	○	○	○	○

Notér andet:

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0% 93% 100%

57. Bruger I ressourcer på at forbedre medarbejdernes kompetencer i engelsk, russisk eller andre fremmedsprog? *

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Gerne flere svar i hver linje

	Ja, i form af interne kurser	Ja, i form af eksterne kurser	Nej, vi føler ikke det er nødvendigt	Nej, vi har ikke ressourcer til det
Engelsk	☐	☐	☐	☐
Russisk	☐	☐	☐	☐
Andre sprog	☐	☐	☐	☐

Notér andet:

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0% 95% 100%

58. På baggrund af virksomhedens erfaring på det russiske marked, hvor enig eller uenig er du i følgende udsagn? *

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Kun ét svar i hver linje

	Meget enig	Enig	Hverken enig eller uenig	Uenig	Meget uenig
Russerne er glade for at kommunikere med deres udenlandske forbindelser på engelsk	○	○	○	○	○
Russerne er generelt gode til engelsk	○	○	○	○	○
Engelsk som lingua franca er nok til at få fodfæste på det russiske marked	○	○	○	○	○
Man opnår de bedste resultater på det russiske marked, hvis man					

behersker russisk	○	○	○	○	○
Russerne foretrækker at gøre foretninger med deres udenlandske forbindelser på russisk	○	○	○	○	○
Kendskab til russisk og den russiske forretningskultur er en forudsætning for at få ordrer i Rusland	○	○	○	○	○
Den russiske mentalitet og forretningskultur er meget anderledes og svære at finde ud af	○	○	○	○	○
Man behøver IKKE det store kendskab til russisk og den russiske forretningskultur for at indlede og udvikle forretningsforbindelser i Rusland	○	○	○	○	○
For en virksomhed, som prøver at få fodfæste på det russiske marked, er det en stor konkurrencemæssig fordel at have medarbejdere, hvis modersmål er russisk	○	○	○	○	○

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0% 96% 100%

59. Hvis du har andre relevante kommentarer, ønsker eller tanker omkring jeres aktiviteter i Rusland, vil det være til stor hjælp, hvis du uddyber dem her:

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Gerne flere linjer

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0% 98% 100%

60. Må jeg eventuelt kontakte dig igen på et senere tidspunkt i forbindelse med min undersøgelse? *

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Kun ét svar

○ Ja

○ Nej

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0% 100% 100%

61. Tusind tak, fordi du har taget dig tid til at besvare dette spørgeskema. Dine svar bliver registreret, når du trykker på "Afslut". Fortsat rigtig god dag!

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