

## RAIL SUPPLY GROUP – SUPPLY CHAIN SURVEY

Methodology: ComRes interviewed 80 members of the UK rail supply chain by telephone between 10<sup>th</sup> March and 10<sup>th</sup> April 2017. Contacts were sourced from Rail Supply Group stakeholder lists. ComRes is a member of the British Polling Council and abides by its rules.

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## JN303351 Rail Supply Group - Supply Chain Survey

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## JN303351 Rail Supply Group - Supply Chain Survey

### D2. To the best of your knowledge, how many employees does your organisation employ in its rail sector enterprises

Base: All respondents

	COMPANY SIZE				SECTOR							TURNOVER (RAIL SECTOR ENTERPRISES)					
	Total	Large - 250+	Large/ Medium 50+	Small 10-49	Micro <10	Civils	Infrastructure	Professional services / Consultancy	Rolling stock manufacturing	Signalling and Communications	Other	Civils/ Infrastructure	More than £36m	More than £10.2m	At least £10.2m but less than £36m	At least £630k but less than £10.2m	Less than £630k
Total	80 100%	7 100%	28 100%	27 100%	25 100%	4 100%	20 100%	27 100%	14 100%	16 100%	23 100%	22 100%	4 100%	12 100%	8 100%	41 100%	26 100%
250+	7 9%	7 100%	7 25%	- -	- -	1 25%	2 10%	4 15%	1 7%	2 13%	2 9%	3 14%	3 75%	4 33%	1 13%	3 7%	- -
50-249	21 26%	- -	21 75%	- -	- -	- -	7 35%	4 15%	4 29%	5 31%	2 9%	7 32%	1 25%	8 67%	7 88%	9 22%	4 15%
10-49	27 34%	- -	- -	27 100%	- -	2 50%	5 25%	10 37%	8 57%	6 38%	7 30%	5 23%	- -	- -	- -	20 49%	7 27%
<10	25 31%	- -	- -	- -	25 100%	1 25%	6 30%	9 33%	1 7%	3 19%	12 52%	7 32%	- -	- -	- -	9 22%	15 58%
Don't know	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -

## JN303351 Rail Supply Group - Supply Chain Survey

### D3. Which of the following areas of work best describes your organisation's principle area of operations?

Base: All respondents

	COMPANY SIZE				SECTOR							TURNOVER (RAIL SECTOR ENTERPRISES)					
	Total	Large - 250+	Large/ Medium 50+	Small 10-49	Micro <10	Civils	Infrastructure	Professional services / Consultancy	Rolling stock manufacturing	Signalling and Communications	Other	Civils/ Infrastructure	More than £36m	More than £10.2m	At least £10.2m but less than £36m	At least £630k but less than £10.2m	Less than £630k
Total	80 100%	7 100%	28 100%	27 100%	25 100%	4 100%	20 100%	27 100%	14 100%	16 100%	23 100%	22 100%	4 100%	12 100%	8 100%	41 100%	26 100%
Civil engineering	4 5%	1 14%	1 4%	2 7%	1 4%	4 100%	2 10%	1 4%	1 7%	2 13%	1 4%	4 18%	1 25%	1 8%	-	2 5%	1 4%
Infrastructure	20 25%	2 29%	9 32%	5 19%	6 24%	2 50%	20 100%	3 11%	4 29%	5 31%	3 13%	20 91%	2 50%	5 42%	3 38%	11 27%	3 12%
Professional services / consultancy	27 34%	4 57%	8 29%	10 37%	9 36%	1 25%	3 15%	27 100%	2 14%	3 19%	2 9%	4 18%	2 50%	3 25%	1 13%	14 34%	9 35%
Rolling stock manufacturing	14 18%	1 14%	5 18%	8 30%	1 4%	1 25%	4 20%	2 7%	14 100%	3 19%	2 9%	4 18%	1 25%	1 8%	-	10 24%	2 8%
Signalling and communications	16 20%	2 29%	7 25%	6 22%	3 12%	2 50%	5 25%	3 11%	3 21%	16 100%	4 17%	6 27%	1 25%	4 33%	3 38%	7 17%	4 15%
Other	23 29%	2 29%	4 14%	7 26%	12 48%	1 25%	3 15%	2 7%	2 14%	4 25%	23 100%	3 14%	1 25%	2 17%	1 13%	9 22%	11 42%

## JN303351 Rail Supply Group - Supply Chain Survey

### D4. Which of the following bands does your organisation's turnover from its rail sector enterprises fall?

Base: All respondents

	COMPANY SIZE				SECTOR							TURNOVER (RAIL SECTOR ENTERPRISES)						
	Total	Large - 250+	Large/ Medium 50+	Small 10-49	Micro <10	Civils	Infrastructure	Professional services / Consultancy	Rolling stock manufacturing	Signalling and Communications	Other	Civils/ Infrastructure	More than £36m	More than £10.2m	At least £10.2m but less than £36m	At least £630k but less than £10.2m	Less than £630k	
Total	80 100%	7 100%	28 100%	27 100%	25 100%	4 100%	20 100%	27 100%	14 100%	16 100%	23 100%	22 100%	4 100%	12 100%	8 100%	41 100%	26 100%	
More than £36m	4 5%	3 43%	4 14%	- -	- -	1 25%	2 10%	2 7%	1 7%	1 6%	1 4%	3 14%	4 100%	4 33%	- -	- -	- -	
At least £10.2m but less than £36m	8 10%	1 14%	8 29%	- -	- -	- -	3 15%	1 4%	- -	3 19%	1 4%	3 14%	- -	8 67%	8 100%	- -	- -	
At least £630k but less than £10.2m	41 51%	3 43%	12 43%	20 74%	9 36%	2 50%	11 55%	14 52%	10 71%	7 44%	9 39%	11 50%	- -	- -	- -	41 100%	- -	
Less than £630k	26 33%	- -	4 14%	7 26%	15 60%	1 25%	3 15%	9 33%	2 14%	4 25%	11 48%	4 18%	- -	- -	- -	- -	- -	26 100%
Prefer not to answer	1 1%	- -	- -	- -	1 4%	- -	1 5%	1 4%	1 7%	1 6%	1 4%	1 5%	- -	- -	- -	- -	- -	

## JN303351 Rail Supply Group - Supply Chain Survey

### Q1. On average, how often does your company sign an NDA when dealing with a Large Company?

Base: All respondents

	COMPANY SIZE				SECTOR							TURNOVER (RAIL SECTOR ENTERPRISES)					
	Total	Large - 250+	Large/ Medium 50+	Small 10-49	Micro <10	Civils	Infrastructure	Professional services / Consultancy	Rolling stock manufacturing	Signalling and Communications	Other	Civils/ Infrastructure	More than £36m	More than £10.2m	At least £10.2m but less than £36m	At least £630k but less than £10.2m	Less than £630k
Total	80 100%	7 100%	28 100%	27 100%	25 100%	4 100%	20 100%	27 100%	14 100%	16 100%	23 100%	22 100%	4 100%	12 100%	8 100%	41 100%	26 100%
0-24% of the time	45 56%	3 43%	18 64%	12 44%	15 60%	2 50%	15 75%	12 44%	6 43%	10 63%	14 61%	16 73%	2 50%	9 75%	7 88%	19 46%	16 62%
25-49% of the time	7 9%	-	2 7%	2 7%	3 12%	1 25%	1 5%	2 7%	2 14%	3 19%	2 9%	1 5%	-	1 8%	1 13%	3 7%	3 12%
50-74% of the time	11 14%	3 43%	6 21%	4 15%	1 4%	-	1 5%	5 19%	3 21%	1 6%	3 13%	1 5%	1 25%	1 8%	-	6 15%	4 15%
75-100% of the time	16 20%	1 14%	2 7%	9 33%	5 20%	1 25%	3 15%	7 26%	3 21%	2 13%	4 17%	4 18%	1 25%	1 8%	-	13 32%	2 8%
Don't know	1 1%	-	-	-	1 4%	-	-	1 4%	-	-	-	-	-	-	-	-	1 4%

## JN303351 Rail Supply Group - Supply Chain Survey

### Q2. At what stage of discussions with Large Companies do you usually sign an NDA?

Base: All respondents

	COMPANY SIZE				SECTOR							TURNOVER (RAIL SECTOR ENTERPRISES)					
	Total	Large - 250+	Large/ Medium 50+	Small 10-49	Micro <10	Civils	Infrastructure	Professional services / Consultancy	Rolling stock manufacturing	Signalling and Communications	Other	Civils/ Infrastructure	More than £36m	More than £10.2m	At least £10.2m but less than £36m	At least £630k but less than £10.2m	Less than £630k
Total	80 100%	7 100%	28 100%	27 100%	25 100%	4 100%	20 100%	27 100%	14 100%	16 100%	23 100%	22 100%	4 100%	12 100%	8 100%	41 100%	26 100%
During initial discussions	50 63%	5 71%	18 64%	18 67%	14 56%	1 25%	9 45%	17 63%	11 79%	8 50%	14 61%	10 45%	3 75%	7 58%	4 50%	29 71%	14 54%
During the bid process	16 20%	2 29%	8 29%	4 15%	4 16%	1 25%	6 30%	8 30%	2 14%	5 31%	2 9%	7 32%	1 25%	4 33%	3 38%	6 15%	5 19%
Once a project is won	3 4%	- -	- -	2 7%	1 4%	1 25%	2 10%	- -	1 7%	2 13%	1 4%	2 9%	- -	- -	- -	3 7%	- -
When you remember to	1 1%	- -	- -	1 4%	- -	1 25%	1 5%	- -	- -	- -	1 4%	1 5%	- -	- -	- -	1 2%	- -
Don't know	10 13%	- -	2 7%	2 7%	6 24%	- -	2 10%	2 7%	- -	1 6%	5 22%	2 9%	- -	1 8%	1 13%	2 5%	7 27%



## JN303351 Rail Supply Group - Supply Chain Survey

### Q3. In your opinion, who do you think benefits most from the use of NDAs?

Base: All respondents

	COMPANY SIZE				SECTOR							TURNOVER (RAIL SECTOR ENTERPRISES)					
	Total	Large - 250+	Large/ Medium 50+	Small 10-49	Micro <10	Civils	Infrastructure	Professional services / Consultancy	Rolling stock manufacturing	Signalling and Communications	Other	Civils/ Infrastructure	More than £36m	More than £10.2m	At least £10.2m but less than £36m	At least £630k but less than £10.2m	Less than £630k
Total	80 100%	7 100%	28 100%	27 100%	25 100%	4 100%	20 100%	27 100%	14 100%	16 100%	23 100%	22 100%	4 100%	12 100%	8 100%	41 100%	26 100%
Your company	4 5%	1 14%	2 7%	1 4%	1 4%	-	3 15%	2 7%	-	1 6%	1 4%	3 14%	-	-	-	3 7%	1 4%
Your company and the Large Company equally	33 41%	5 71%	13 46%	11 41%	9 36%	2 50%	9 45%	11 41%	10 71%	8 50%	9 39%	10 45%	4 100%	5 42%	1 13%	21 51%	6 23%
The Large Company	31 39%	1 14%	10 36%	12 44%	9 36%	2 50%	6 30%	11 41%	4 29%	5 31%	8 35%	7 32%	-	5 42%	5 63%	14 34%	12 46%
Don't know	12 15%	-	3 11%	3 11%	6 24%	-	2 10%	3 11%	-	2 13%	5 22%	2 9%	-	2 17%	2 25%	3 7%	7 27%

## JN303351 Rail Supply Group - Supply Chain Survey

### Q4. When signing an NDA do you normally contract using...

Base: All respondents

	COMPANY SIZE				SECTOR							TURNOVER (RAIL SECTOR ENTERPRISES)					
	Total	Large - 250+	Large/ Medium 50+	Small 10-49	Micro <10	Civils	Infrastructure	Professional services / Consultancy	Rolling stock manufacturing	Signalling and Communications	Other	Civils/ Infrastructure	More than £36m	More than £10.2m	At least £10.2m but less than £36m	At least £630k but less than £10.2m	Less than £630k
Total	80 100%	7 100%	28 100%	27 100%	25 100%	4 100%	20 100%	27 100%	14 100%	16 100%	23 100%	22 100%	4 100%	12 100%	8 100%	41 100%	26 100%
Your company's standard form of NDA	11 14%	2 29%	6 21%	3 11%	2 8%	-	4 20%	5 19%	2 14%	4 25%	3 13%	4 18%	1 25%	4 33%	3 38%	6 15%	1 4%
The Large Company's standard form of NDA	47 59%	3 43%	14 50%	19 70%	14 56%	3 75%	12 60%	15 56%	9 64%	7 44%	13 57%	13 59%	1 25%	5 42%	4 50%	25 61%	16 62%
Other	20 25%	2 29%	7 25%	5 19%	8 32%	1 25%	4 20%	6 22%	2 14%	5 31%	7 30%	5 23%	2 50%	3 25%	1 13%	10 24%	7 27%
Don't know	2 3%	-	1 4%	-	1 4%	-	-	1 4%	1 7%	-	-	-	-	-	-	-	2 8%

## JN303351 Rail Supply Group - Supply Chain Survey

### Q5. Overall, would you say that the use of NDA's has a positive, negative or neutral impact on your company?

Base: All respondents

	COMPANY SIZE				SECTOR							TURNOVER (RAIL SECTOR ENTERPRISES)					
	Total	Large - 250+	Large/ Medium 50+	Small 10-49	Micro <10	Civils	Infrastructure	Professional services / Consultancy	Rolling stock manufacturing	Signalling and Communications	Other	Civils/ Infrastructure	More than £36m	More than £10.2m	At least £10.2m but less than £36m	At least £630k but less than £10.2m	Less than £630k
Total	80 100%	7 100%	28 100%	27 100%	25 100%	4 100%	20 100%	27 100%	14 100%	16 100%	23 100%	22 100%	4 100%	12 100%	8 100%	41 100%	26 100%
Positive	20 25%	2 29%	7 25%	5 19%	8 32%	1 25%	5 25%	5 19%	4 29%	7 44%	8 35%	6 27%	1 25%	3 25%	2 25%	8 20%	8 31%
Neutral	48 60%	5 71%	19 68%	19 70%	10 40%	1 25%	12 60%	20 74%	10 71%	8 50%	9 39%	12 55%	3 75%	8 67%	5 63%	30 73%	10 38%
Negative	3 4%	- -	1 4%	- -	2 8%	1 25%	1 5%	- -	- -	- -	1 4%	2 9%	- -	1 8%	1 13%	- -	2 8%
Don't know	9 11%	- -	1 4%	3 11%	5 20%	1 25%	2 10%	2 7%	- -	1 6%	5 22%	2 9%	- -	- -	- -	3 7%	6 23%

## JN303351 Rail Supply Group - Supply Chain Survey

### Q6. To what extent, if at all, do you feel that you are able to negotiate with large companies over their use of NDAs?

Base: All respondents

	COMPANY SIZE				SECTOR							TURNOVER (RAIL SECTOR ENTERPRISES)					
	Total	Large - 250+	Large/ Medium 50+	Small 10-49	Micro <10	Civils	Infrastructure	Professional services / Consultancy	Rolling stock manufacturing	Signalling and Communications	Other	Civils/ Infrastructure	More than £36m	More than £10.2m	At least £10.2m but less than £36m	At least £630k but less than £10.2m	Less than £630k
Total	80 100%	7 100%	28 100%	27 100%	25 100%	4 100%	20 100%	27 100%	14 100%	16 100%	23 100%	22 100%	4 100%	12 100%	8 100%	41 100%	26 100%
I have not felt the need to	31 39%	2 29%	10 36%	11 41%	10 40%	1 25%	8 40%	10 37%	2 14%	5 31%	11 48%	8 36%	- -	3 25%	3 38%	19 46%	9 35%
I would like to, but do not feel I can	9 11%	1 14%	3 11%	2 7%	4 16%	- -	2 10%	3 11%	1 7%	1 6%	3 13%	2 9%	1 25%	2 17%	1 13%	3 7%	4 15%
I feel I can	30 38%	4 57%	12 43%	12 44%	6 24%	3 75%	8 40%	12 44%	10 71%	9 56%	5 22%	10 45%	3 75%	6 50%	3 38%	17 41%	6 23%
Don't know	10 13%	- -	3 11%	2 7%	5 20%	- -	2 10%	2 7%	1 7%	1 6%	4 17%	2 9%	- -	1 8%	1 13%	2 5%	7 27%

## JN303351 Rail Supply Group - Supply Chain Survey

### Q7. Do you usually negotiate with large companies over their use of NDAs?

Base: All who have felt the need to negotiate

	COMPANY SIZE				SECTOR							TURNOVER (RAIL SECTOR ENTERPRISES)					
	Total	Large - 250+	Large/ Medium 50+	Small 10-49	Micro <10	Civils	Infrastructure	Professional services / Consultancy	Rolling stock manufacturing	Signalling and Communications	Other	Civils/ Infrastructure	More than £36m	More than £10.2m	At least £10.2m but less than £36m	At least £630k but less than £10.2m	Less than £630k
Total	39 100%	5 100%	15 100%	14 100%	10 100%	3 100%	10 100%	15 100%	11 100%	10 100%	8 100%	12 100%	4 100%	8 100%	4 100%	20 100%	10 100%
Yes - successfully	25 64%	3 60%	9 60%	9 64%	7 70%	3 100%	7 70%	10 67%	8 73%	9 90%	5 63%	9 75%	3 75%	5 63%	2 50%	14 70%	5 50%
Yes - unsuccessfully	4 10%	-	2 13%	1 7%	1 10%	-	2 20%	2 13%	-	-	-	2 17%	-	1 13%	1 25%	2 10%	1 10%
No	10 26%	2 40%	4 27%	4 29%	2 20%	-	1 10%	3 20%	3 27%	1 10%	3 38%	1 8%	1 25%	2 25%	1 25%	4 20%	4 40%
Don't know	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>NETS</b>																	
Net: Yes	29 74%	3 60%	11 73%	10 71%	8 80%	3 100%	9 90%	12 80%	8 73%	9 90%	5 63%	11 92%	3 75%	6 75%	3 75%	16 80%	6 60%

## JN303351 Rail Supply Group - Supply Chain Survey

**Q9. In the past two years, roughly what proportion of the bids that you have applied for ended in substitution?**

Base: All respondents

	COMPANY SIZE				SECTOR							TURNOVER (RAIL SECTOR ENTERPRISES)					
	Total	Large - 250+	Large/ Medium 50+	Small 10-49	Micro <10	Civils	Infrastructure	Professional services / Consultancy	Rolling stock manufacturing	Signalling and Communications	Other	Civils/ Infrastructure	More than £36m	More than £10.2m	At least £10.2m but less than £36m	At least £630k but less than £10.2m	Less than £630k
Total	80 100%	7 100%	28 100%	27 100%	25 100%	4 100%	20 100%	27 100%	14 100%	16 100%	23 100%	22 100%	4 100%	12 100%	8 100%	41 100%	26 100%
None	37 46%	5 71%	10 36%	13 48%	14 56%	2 50%	8 40%	13 48%	5 36%	6 38%	13 57%	9 41%	4 100%	6 50%	2 25%	17 41%	14 54%
1-24%	28 35%	2 29%	12 43%	8 30%	8 32%	-	8 40%	12 44%	5 36%	7 44%	6 26%	8 36%	-	4 33%	4 50%	17 41%	6 23%
25%-49%	7 9%	-	2 7%	3 11%	2 8%	1 25%	2 10%	1 4%	1 7%	1 6%	4 17%	2 9%	-	1 8%	1 13%	4 10%	2 8%
50%-74%	2 3%	-	1 4%	-	1 4%	1 25%	1 5%	-	-	-	-	2 9%	-	1 8%	1 13%	-	1 4%
75%-100%	1 1%	-	-	1 4%	-	-	-	-	1 7%	-	-	-	-	-	-	1 2%	-
Don't know	5 6%	-	3 11%	2 7%	-	-	1 5%	1 4%	2 14%	2 13%	-	1 5%	-	-	-	2 5%	3 12%

## JN303351 Rail Supply Group - Supply Chain Survey

### Q10. And what impact, if any, does substitution have on your business?

Base: All respondents

	COMPANY SIZE				SECTOR							TURNOVER (RAIL SECTOR ENTERPRISES)					
	Total	Large - 250+	Large/ Medium 50+	Small 10-49	Micro <10	Civils	Infrastructure	Professional services / Consultancy	Rolling stock manufacturing	Signalling and Communications	Other	Civils/ Infrastructure	More than £36m	More than £10.2m	At least £10.2m but less than £36m	At least £630k but less than £10.2m	Less than £630k
Total	80 100%	7 100%	28 100%	27 100%	25 100%	4 100%	20 100%	27 100%	14 100%	16 100%	23 100%	22 100%	4 100%	12 100%	8 100%	41 100%	26 100%
It does not cause my company problems	22 28%	1 14%	5 18%	8 30%	9 36%	1 25%	5 25%	7 26%	4 29%	3 19%	8 35%	5 23%	-	1 8%	1 13%	12 29%	9 35%
It causes my company some problems	36 45%	3 43%	16 57%	10 37%	10 40%	2 50%	9 45%	12 44%	4 29%	8 50%	7 30%	10 45%	-	5 42%	5 63%	21 51%	10 38%
It causes my company significant problems	19 24%	3 43%	7 25%	8 30%	4 16%	1 25%	6 30%	7 26%	6 43%	5 31%	6 26%	7 32%	4 100%	6 50%	2 25%	8 20%	4 15%
Don't know	3 4%	-	-	1 4%	2 8%	-	-	1 4%	-	-	2 9%	-	-	-	-	-	3 12%

## JN303351 Rail Supply Group - Supply Chain Survey

### Q11. To what extent, if at all, do you feel that you are able to negotiate with large companies over their use of substitution?

Base: All respondents

	COMPANY SIZE				SECTOR							TURNOVER (RAIL SECTOR ENTERPRISES)					
	Total	Large - 250+	Large/ Medium 50+	Small 10-49	Micro <10	Civils	Infrastructure	Professional services / Consultancy	Rolling stock manufacturing	Signalling and Communications	Other	Civils/ Infrastructure	More than £36m	More than £10.2m	At least £10.2m but less than £36m	At least £630k but less than £10.2m	Less than £630k
Total	80 100%	7 100%	28 100%	27 100%	25 100%	4 100%	20 100%	27 100%	14 100%	16 100%	23 100%	22 100%	4 100%	12 100%	8 100%	41 100%	26 100%
I have not felt the need to	32 40%	2 29%	7 25%	15 56%	10 40%	1 25%	7 35%	10 37%	6 43%	8 50%	10 43%	7 32%	1 25%	4 33%	3 38%	20 49%	8 31%
I would like to, but do not feel I can	21 26%	1 14%	8 29%	8 30%	5 20%	1 25%	4 20%	7 26%	4 29%	3 19%	6 26%	4 18%	- -	4 33%	4 50%	10 24%	7 27%
I feel I can	18 23%	4 57%	10 36%	2 7%	6 24%	2 50%	7 35%	8 30%	3 21%	5 31%	3 13%	9 41%	3 75%	4 33%	1 13%	8 20%	5 19%
Don't know	9 11%	- -	3 11%	2 7%	4 16%	- -	2 10%	2 7%	1 7%	- -	4 17%	2 9%	- -	- -	- -	3 7%	6 23%



## JN303351 Rail Supply Group - Supply Chain Survey

### Q12. Do you usually negotiate with large companies over their use of substitution?

Base: All who have felt the need to negotiate

	COMPANY SIZE				SECTOR							TURNOVER (RAIL SECTOR ENTERPRISES)					
	Total	Large - 250+	Large/ Medium 50+	Small 10-49	Micro <10	Civils	Infrastructure	Professional services / Consultancy	Rolling stock manufacturing	Signalling and Communications	Other	Civils/ Infrastructure	More than £36m	More than £10.2m	At least £10.2m but less than £36m	At least £630k but less than £10.2m	Less than £630k
Total	39 100%	5 100%	18 100%	10 100%	11 100%	3 100%	11 100%	15 100%	7 100%	8 100%	9 100%	13 100%	3 100%	8 100%	5 100%	18 100%	12 100%
Yes - successfully	8 21%	1 20%	4 22%	2 20%	2 18%	1 33%	4 36%	2 13%	1 14%	2 25%	1 11%	5 38%	2 67%	2 25%	-	4 22%	2 17%
Yes - unsuccessfully	12 31%	1 20%	5 28%	1 10%	6 55%	-	2 18%	6 40%	1 14%	1 13%	2 22%	2 15%	-	2 25%	2 40%	7 39%	3 25%
No	17 44%	2 40%	8 44%	6 60%	3 27%	1 33%	5 45%	5 33%	5 71%	3 38%	6 67%	5 38%	-	3 38%	3 60%	7 39%	6 50%
Don't know	2 5%	1 20%	1 6%	1 10%	-	1 33%	-	2 13%	-	2 25%	-	1 8%	1 33%	1 13%	-	-	1 8%
<b>NETS</b>																	
Net: Yes	20 51%	2 40%	9 50%	3 30%	8 73%	1 33%	6 55%	8 53%	2 29%	3 38%	3 33%	7 54%	2 67%	4 50%	2 40%	11 61%	5 42%

## JN303351 Rail Supply Group - Supply Chain Survey

### Q13. How easy or difficult is it to find out how the Large Companies use the information you provide for inclusion in their bid submissions?

Base: All respondents

	COMPANY SIZE				SECTOR							TURNOVER (RAIL SECTOR ENTERPRISES)					
	Total	Large - 250+	Large/ Medium 50+	Small 10-49	Micro <10	Civils	Infrastructure	Professional services / Consultancy	Rolling stock manufacturing	Signalling and Communications	Other	Civils/ Infrastructure	More than £36m	More than £10.2m	At least £10.2m but less than £36m	At least £630k but less than £10.2m	Less than £630k
Total	80 100%	7 100%	28 100%	27 100%	25 100%	4 100%	20 100%	27 100%	14 100%	16 100%	23 100%	22 100%	4 100%	12 100%	8 100%	41 100%	26 100%
Very easy	2 3%	-	2 7%	-	-	-	2 10%	-	-	-	-	2 9%	1 25%	2 17%	1 13%	-	-
Fairly easy	13 16%	4 57%	8 29%	3 11%	2 8%	1 25%	7 35%	6 22%	2 14%	2 13%	3 13%	8 36%	2 50%	5 42%	3 38%	6 15%	2 8%
Fairly difficult	27 34%	2 29%	10 36%	10 37%	7 28%	1 25%	6 30%	10 37%	5 36%	6 38%	8 35%	6 27%	1 25%	3 25%	2 25%	17 41%	6 23%
Very difficult	26 33%	1 14%	7 25%	8 30%	11 44%	1 25%	4 20%	8 30%	3 21%	6 38%	6 26%	5 23%	-	2 17%	2 25%	13 32%	11 42%
Don't know	12 15%	-	1 4%	6 22%	5 20%	1 25%	1 5%	3 11%	4 29%	2 13%	6 26%	1 5%	-	-	-	5 12%	7 27%
<b>NETS</b>																	
Net: Easy	15 19%	4 57%	10 36%	3 11%	2 8%	1 25%	9 45%	6 22%	2 14%	2 13%	3 13%	10 45%	3 75%	7 58%	4 50%	6 15%	2 8%
Net: Difficult	53 66%	3 43%	17 61%	18 67%	18 72%	2 50%	10 50%	18 67%	8 57%	12 75%	14 61%	11 50%	1 25%	5 42%	4 50%	30 73%	17 65%

## JN303351 Rail Supply Group - Supply Chain Survey

### Q15a. Please can you tell me the percentage of your invoices (by value) paid late by Large Companies

Base: All respondents

	COMPANY SIZE				SECTOR							TURNOVER (RAIL SECTOR ENTERPRISES)					
	Total	Large - 250+	Large/ Medium 50+	Small 10-49	Micro <10	Civils	Infrastructure	Professional services / Consultancy	Rolling stock manufacturing	Signalling and Communications	Other	Civils/ Infrastructure	More than £36m	More than £10.2m	At least £10.2m but less than £36m	At least £630k but less than £10.2m	Less than £630k
Total	80 100%	7 100%	28 100%	27 100%	25 100%	4 100%	20 100%	27 100%	14 100%	16 100%	23 100%	22 100%	4 100%	12 100%	8 100%	41 100%	26 100%
0%	12 15%	1 14%	2 7%	5 19%	5 20%	-	3 15%	1 4%	2 14%	2 13%	8 35%	3 14%	-	1 8%	1 13%	5 12%	6 23%
1%	1 1%	1 14%	1 4%	-	-	-	-	-	-	-	1 4%	-	1 25%	1 8%	-	-	-
3%	4 5%	-	2 7%	2 7%	-	1 5%	1 4%	1 7%	1 6%	-	-	1 5%	-	1 8%	1 13%	2 5%	1 4%
4%	2 3%	-	-	2 7%	-	-	-	-	1 7%	-	1 4%	-	-	-	-	2 5%	-
5%	3 4%	-	1 4%	1 4%	1 4%	-	2 10%	-	-	2 13%	-	2 9%	-	-	-	2 5%	1 4%
9%	1 1%	-	1 4%	-	-	-	-	1 4%	-	-	-	-	-	-	-	1 2%	-
10%	11 14%	1 14%	3 11%	4 15%	4 16%	-	2 10%	4 15%	2 14%	3 19%	3 13%	2 9%	1 25%	2 17%	1 13%	6 15%	3 12%
15%	3 4%	-	1 4%	-	2 8%	-	1 5%	-	-	1 6%	2 9%	1 5%	-	-	-	1 2%	2 8%
20%	6 8%	-	3 11%	2 7%	1 4%	-	2 10%	1 4%	2 14%	-	1 4%	2 9%	-	2 17%	2 25%	3 7%	1 4%
25%	2 3%	-	-	1 4%	1 4%	1 25%	1 5%	1 4%	1 7%	1 6%	-	1 5%	-	-	-	1 2%	1 4%
26%	1 1%	-	1 4%	-	-	-	-	1 4%	-	-	-	-	-	-	-	1 2%	-
28%	1 1%	-	-	1 4%	-	1 25%	1 5%	-	-	-	1 4%	1 5%	-	-	-	1 2%	-
30%	4 5%	1 14%	3 11%	-	1 4%	-	-	2 7%	1 7%	1 6%	-	-	-	2 17%	2 25%	2 5%	-
50%	10 13%	-	2 7%	5 19%	3 12%	-	1 5%	7 26%	-	1 6%	2 9%	1 5%	-	1 8%	1 13%	4 10%	5 19%
60%	1 1%	-	-	-	1 4%	-	1 5%	-	-	-	-	1 5%	-	-	-	1 2%	-
75%	2 3%	1 14%	1 4%	1 4%	-	-	-	2 7%	-	-	-	-	-	-	-	2 5%	-
80%	2 3%	-	-	-	2 8%	-	-	1 4%	-	-	1 4%	-	-	-	-	-	2 8%

## JN303351 Rail Supply Group - Supply Chain Survey

### Q15a. Please can you tell me the percentage of your invoices (by value) paid late by Large Companies

Base: All respondents

	COMPANY SIZE				SECTOR							TURNOVER (RAIL SECTOR ENTERPRISES)					
	Total	Large - 250+	Large/ Medium 50+	Small 10-49	Micro <10	Civils	Infrastructure	Professional services / Consultancy	Rolling stock manufacturing	Signalling and Communications	Other	Civils/ Infrastructure	More than £36m	More than £10.2m	At least £10.2m but less than £36m	At least £630k but less than £10.2m	Less than £630k
Total	80 100%	7 100%	28 100%	27 100%	25 100%	4 100%	20 100%	27 100%	14 100%	16 100%	23 100%	22 100%	4 100%	12 100%	8 100%	41 100%	26 100%
85%	1 1%	-	-	-	1 4%	1 25%	-	-	-	-	-	1 5%	-	-	-	-	1 4%
90%	3 4%	-	2 7%	1 4%	-	-	1 5%	-	2 14%	1 6%	1 4%	1 5%	-	-	-	3 7%	-
Don't know	10 13%	2 29%	5 18%	2 7%	3 12%	1 25%	4 20%	5 19%	2 14%	3 19%	2 9%	5 23%	2 50%	2 17%	-	4 10%	3 12%
<b>NETS</b>																	
Net: 1-24%	31 39%	2 29%	12 43%	11 41%	8 32%	-	8 40%	7 26%	6 43%	7 44%	8 35%	8 36%	2 50%	6 50%	4 50%	17 41%	8 31%
Net: 25-49%	8 10%	1 14%	4 14%	2 7%	2 8%	2 50%	2 10%	4 15%	2 14%	2 13%	1 4%	2 9%	-	2 17%	2 25%	5 12%	1 4%
Net: 50-74%	11 14%	-	2 7%	5 19%	4 16%	-	2 10%	7 26%	-	1 6%	2 9%	2 9%	-	1 8%	1 13%	5 12%	5 19%
Net: 75-99%	8 10%	1 14%	3 11%	2 7%	3 12%	1 25%	1 5%	3 11%	2 14%	1 6%	2 9%	2 9%	-	-	-	5 12%	3 12%
Mean %	25.3	23.2	26.0	22.7	27.5	46.0	21.3	34.7	25.2	19.5	18.2	25.1	5.5	17.4	20.4	26.7	26.4
Standard deviation	26.97	31.36	27.43	25.86	28.69	33.81	25.33	24.57	31.84	25.47	26.89	28.99	6.36	15.92	16.42	28.34	28.81
Standard error	3.22	14.03	5.72	5.17	6.12	19.52	6.33	5.24	9.19	7.06	5.87	7.03	4.50	5.04	5.81	4.66	6.01

## JN303351 Rail Supply Group - Supply Chain Survey

### Q15a. Please can you tell me the percentage of your invoices (by value) paid late by Large Companies

Base: All excluding don't know

	COMPANY SIZE				SECTOR							TURNOVER (RAIL SECTOR ENTERPRISES)					
	Total	Large - 250+	Large/ Medium 50+	Small 10-49	Micro <10	Civils	Infrastructure	Professional services / Consultancy	Rolling stock manufacturing	Signalling and Communications	Other	Civils/ Infrastructure	More than £36m	More than £10.2m	At least £10.2m but less than £36m	At least £630k but less than £10.2m	Less than £630k
Total	70 100%	5 100%	23 100%	25 100%	22 100%	3 100%	16 100%	22 100%	12 100%	13 100%	21 100%	17 100%	2 100%	10 100%	8 100%	37 100%	23 100%
0%	12 17%	1 20%	2 9%	5 20%	5 23%	-	3 19%	1 5%	2 17%	2 15%	8 38%	3 18%	-	1 10%	1 13%	5 14%	6 26%
1%	1 1%	1 20%	1 4%	-	-	-	-	-	-	-	1 5%	-	1 50%	1 10%	-	-	-
3%	4 6%	-	2 9%	2 8%	-	1 6%	1 5%	1 8%	1 8%	-	1 6%	-	1 10%	1 13%	2 5%	1 4%	
4%	2 3%	-	-	2 8%	-	-	-	1 8%	-	1 5%	-	-	-	-	2 5%	-	
5%	3 4%	-	1 4%	1 4%	1 5%	-	2 13%	-	1 -	2 15%	-	2 12%	-	-	-	2 5%	1 4%
9%	1 1%	-	1 4%	-	-	-	-	1 5%	-	-	-	-	-	-	-	1 3%	-
10%	11 16%	1 20%	3 13%	4 16%	4 18%	-	2 13%	4 18%	2 17%	3 23%	3 14%	2 12%	1 50%	2 20%	1 13%	6 16%	3 13%
15%	3 4%	-	1 4%	-	2 9%	-	1 6%	-	-	1 8%	2 10%	1 6%	-	-	-	1 3%	2 9%
20%	6 9%	-	3 13%	2 8%	1 5%	-	2 13%	1 5%	2 17%	-	1 5%	2 12%	-	2 20%	2 25%	3 8%	1 4%
25%	2 3%	-	-	1 4%	1 5%	1 33%	1 6%	1 5%	1 8%	1 8%	-	1 6%	-	-	-	1 3%	1 4%
26%	1 1%	-	1 4%	-	-	-	-	1 5%	-	-	-	-	-	-	-	1 3%	-
28%	1 1%	-	-	1 4%	-	1 33%	1 6%	-	-	-	1 5%	1 6%	-	-	-	1 3%	-
30%	4 6%	1 20%	3 13%	-	1 5%	-	-	2 9%	1 8%	1 8%	-	-	-	2 20%	2 25%	2 5%	-
50%	10 14%	-	2 9%	5 20%	3 14%	-	1 6%	7 32%	-	1 8%	2 10%	1 6%	-	1 10%	1 13%	4 11%	5 22%
60%	1 1%	-	-	-	1 5%	-	1 6%	-	-	-	-	1 6%	-	-	-	1 3%	-
75%	2 3%	1 20%	1 4%	1 4%	-	-	-	2 9%	-	-	-	-	-	-	-	2 5%	-
80%	2 3%	-	-	-	2 9%	-	-	1 5%	-	-	1 5%	-	-	-	-	-	2 9%

## JN303351 Rail Supply Group - Supply Chain Survey

### Q15a. Please can you tell me the percentage of your invoices (by value) paid late by Large Companies

Base: All excluding don't know

	COMPANY SIZE				SECTOR							TURNOVER (RAIL SECTOR ENTERPRISES)					
	Total	Large - 250+	Large/ Medium 50+	Small 10-49	Micro <10	Civils	Infrastructure	Professional services / Consultancy	Rolling stock manufacturing	Signalling and Communications	Other	Civils/ Infrastructure	More than £36m	More than £10.2m	At least £10.2m but less than £36m	At least £630k but less than £10.2m	Less than £630k
Total	70 100%	5 100%	23 100%	25 100%	22 100%	3 100%	16 100%	22 100%	12 100%	13 100%	21 100%	17 100%	2 100%	10 100%	8 100%	37 100%	23 100%
85%	1 1%	-	-	-	1 5%	1 33%	-	-	-	-	-	1 6%	-	-	-	-	1 4%
90%	3 4%	-	2 9%	1 4%	-	-	1 6%	-	2 17%	1 8%	1 5%	1 6%	-	-	-	3 8%	-
<b>NETS</b>																	
Net: 1-24%	31 44%	2 40%	12 52%	11 44%	8 36%	-	8 50%	7 32%	6 50%	7 54%	8 38%	8 47%	2 100%	6 60%	4 50%	17 46%	8 35%
Net: 25-49%	8 11%	1 20%	4 17%	2 8%	2 9%	2 67%	2 13%	4 18%	2 17%	2 15%	1 5%	2 12%	-	2 20%	2 25%	5 14%	1 4%
Net: 50-74%	11 16%	-	2 9%	5 20%	4 18%	-	2 13%	7 32%	-	1 8%	2 10%	2 12%	-	1 10%	1 13%	5 14%	5 22%
Net: 75-99%	8 11%	1 20%	3 13%	2 8%	3 14%	1 33%	1 6%	3 14%	2 17%	1 8%	2 10%	2 12%	-	-	-	5 14%	3 13%
Mean %	25.3	23.2	26.0	22.7	27.5	46.0	21.3	34.7	25.2	19.5	18.2	25.1	5.5	17.4	20.4	26.7	26.4
Standard deviation	26.97	31.36	27.43	25.86	28.69	33.81	25.33	24.57	31.84	25.47	26.89	28.99	6.36	15.92	16.42	28.34	28.81
Standard error	3.22	14.03	5.72	5.17	6.12	19.52	6.33	5.24	9.19	7.06	5.87	7.03	4.50	5.04	5.81	4.66	6.01

## JN303351 Rail Supply Group - Supply Chain Survey

**Q15b. Please can you tell me the average value of outstanding overdue invoices that you are chasing Large Companies for**

Base: All respondents

	COMPANY SIZE				SECTOR							TURNOVER (RAIL SECTOR ENTERPRISES)					
	Total	Large - 250+	Large/ Medium 50+	Small 10-49	Micro <10	Civils	Infrastructure	Professional services / Consultancy	Rolling stock manufacturing	Signalling and Communications	Other	Civils/ Infrastructure	More than £36m	More than £10.2m	At least £10.2m but less than £36m	At least £630k but less than £10.2m	Less than £630k
Total	80 100%	7 100%	28 100%	27 100%	25 100%	4 100%	20 100%	27 100%	14 100%	16 100%	23 100%	22 100%	4 100%	12 100%	8 100%	41 100%	26 100%
0	8 10%	1 14%	1 4%	3 11%	4 16%	-	2 10%	1 4%	1 7%	-	6 26%	2 9%	-	-	-	4 10%	4 15%
250	1 1%	-	-	1 4%	-	1 25%	1 5%	-	1 7%	1 6%	-	1 5%	-	-	-	1 2%	-
2000	1 1%	-	-	1 4%	-	-	-	-	-	-	1 4%	-	-	-	-	1 2%	-
2500	2 3%	-	1 4%	-	1 4%	-	-	1 4%	-	-	1 4%	-	-	-	-	-	2 8%
4000	1 1%	-	-	-	1 4%	-	-	1 4%	-	-	-	-	-	-	-	1 2%	-
5500	1 1%	-	-	-	1 4%	-	-	1 4%	-	-	-	-	-	-	-	1 2%	-
7500	1 1%	-	1 4%	-	-	-	-	1 4%	-	-	-	-	-	-	-	1 2%	-
8000	1 1%	-	-	1 4%	-	-	-	-	1 7%	-	-	-	-	-	-	1 2%	-
10000	5 6%	-	1 4%	1 4%	3 12%	-	-	2 7%	-	-	3 13%	-	-	1 8%	1 13%	-	4 15%
15000	1 1%	-	-	-	1 4%	-	-	1 4%	-	-	-	-	-	-	-	-	1 4%
20000	8 10%	-	2 7%	4 15%	2 8%	-	3 15%	2 7%	1 7%	2 13%	1 4%	3 14%	-	-	-	7 17%	1 4%
25000	2 3%	-	-	2 7%	-	-	-	1 4%	-	2 13%	1 4%	-	-	-	-	-	2 8%
30000	3 4%	-	2 7%	-	1 4%	-	1 5%	1 4%	-	-	1 4%	1 5%	-	-	-	1 2%	2 8%
40000	2 3%	-	1 4%	1 4%	-	-	1 5%	1 4%	-	-	-	1 5%	-	1 8%	1 13%	-	1 4%
45000	1 1%	-	-	1 4%	-	1 25%	1 5%	-	-	-	1 4%	1 5%	-	-	-	1 2%	-
50000	9 11%	1 14%	3 11%	2 7%	4 16%	-	4 20%	1 4%	2 14%	2 13%	2 9%	4 18%	-	1 8%	1 13%	4 10%	4 15%
60000	1 1%	-	1 4%	-	-	-	-	-	-	1 6%	-	-	-	1 8%	1 13%	-	-

## JN303351 Rail Supply Group - Supply Chain Survey

**Q15b. Please can you tell me the average value of outstanding overdue invoices that you are chasing Large Companies for**

Base: All respondents

	COMPANY SIZE				SECTOR							TURNOVER (RAIL SECTOR ENTERPRISES)					
	Total	Large - 250+	Large/ Medium 50+	Small 10-49	Micro <10	Civils	Infrastructure	Professional services / Consultancy	Rolling stock manufacturing	Signalling and Communications	Other	Civils/ Infrastructure	More than £36m	More than £10.2m	At least £10.2m but less than £36m	At least £630k but less than £10.2m	Less than £630k
Total	80 100%	7 100%	28 100%	27 100%	25 100%	4 100%	20 100%	27 100%	14 100%	16 100%	23 100%	22 100%	4 100%	12 100%	8 100%	41 100%	26 100%
70000	1 1%	-	-	1 4%	-	-	-	1 4%	-	-	-	-	-	-	-	1 2%	-
75000	1 1%	-	1 4%	-	-	-	1 5%	-	-	-	-	1 5%	-	1 8%	1 13%	-	-
80000	1 1%	-	-	-	1 4%	-	-	-	-	1 6%	1 4%	-	-	-	-	1 2%	-
100000	4 5%	1 14%	2 7%	-	2 8%	-	-	1 4%	1 7%	1 6%	1 4%	-	1 25%	1 8%	-	2 5%	1 4%
200000	3 4%	-	1 4%	1 4%	1 4%	1 25%	-	1 4%	1 7%	-	-	1 5%	-	-	-	2 5%	1 4%
250000	2 3%	-	-	1 4%	1 4%	-	-	2 7%	-	-	-	-	-	-	-	1 2%	1 4%
300000	2 3%	-	-	1 4%	1 4%	-	-	1 4%	-	-	1 4%	-	-	-	-	2 5%	-
1300000	1 1%	-	1 4%	-	-	-	1 5%	-	-	-	-	1 5%	-	1 8%	1 13%	-	-
1500000	1 1%	-	1 4%	-	-	-	1 5%	-	-	-	-	1 5%	-	-	-	1 2%	-
2500000	1 1%	-	-	1 4%	-	-	-	-	1 7%	-	-	-	-	-	-	-	1 4%
5000000	1 1%	-	-	1 4%	-	-	-	1 4%	-	-	-	-	-	-	-	1 2%	-
Don't know	14 18%	4 57%	9 32%	4 15%	1 4%	1 25%	4 20%	6 22%	5 36%	6 38%	3 13%	5 23%	3 75%	5 42%	2 25%	7 17%	1 4%
<b>NETS</b>																	
1-5,500	6 8%	-	1 4%	2 7%	3 12%	1 25%	1 5%	3 11%	1 7%	1 6%	2 9%	1 5%	-	-	-	4 10%	2 8%
5,501 – 20,000	16 20%	-	4 14%	6 22%	6 24%	-	3 15%	6 22%	2 14%	2 13%	4 17%	3 14%	-	1 8%	1 13%	9 22%	6 23%
20,001 – 50,000	17 21%	1 14%	6 21%	6 22%	5 20%	1 25%	7 35%	4 15%	2 14%	4 25%	5 22%	7 32%	-	2 17%	2 25%	6 15%	9 35%
50,001 – 100,000	8 10%	1 14%	4 14%	1 4%	3 12%	-	1 5%	2 7%	1 7%	3 19%	2 9%	1 5%	1 25%	3 25%	2 25%	4 10%	1 4%



## JN303351 Rail Supply Group - Supply Chain Survey

**Q15b. Please can you tell me the average value of outstanding overdue invoices that you are chasing Large Companies for**

Base: All respondents

	COMPANY SIZE				SECTOR							TURNOVER (RAIL SECTOR ENTERPRISES)					
	Total	Large - 250+	Large/ Medium 50+	Small 10-49	Micro <10	Civils	Infrastructure	Professional services / Consultancy	Rolling stock manufacturing	Signalling and Communications	Other	Civils/ Infrastructure	More than £36m	More than £10.2m	At least £10.2m but less than £36m	At least £630k but less than £10.2m	Less than £630k
Total	80 100%	7 100%	28 100%	27 100%	25 100%	4 100%	20 100%	27 100%	14 100%	16 100%	23 100%	22 100%	4 100%	12 100%	8 100%	41 100%	26 100%
100,001 – 200,000	3 4%	-	1 4%	1 4%	1 4%	1 25%	-	1 4%	1 7%	-	-	1 5%	-	-	-	2 5%	1 4%
200,001 - 1,300,000	5 6%	-	1 4%	2 7%	2 8%	-	1 5%	3 11%	-	-	1 4%	1 5%	-	1 8%	1 13%	3 7%	1 4%
1,300,001 - 5,000,000	3 4%	-	1 4%	2 7%	-	-	1 5%	1 4%	1 7%	-	-	1 5%	-	-	-	2 5%	1 4%
Mean in 000's	207.0	50.0	191.9	376.3	56.6	81.7	203.1	305.3	325.3	43.0	36.8	202.9	100.0	233.6	255.8	251.3	139.2
Standard deviation	711.28	50.00	429.56	1132.22	81.92	104.92	469.13	1079.81	817.99	30.84	68.31	454.23	-	471.09	512.00	878.59	495.54
Standard error	87.55	28.87	98.55	236.08	16.72	60.58	117.28	235.63	272.66	9.75	15.27	110.17	-	178.05	209.02	150.68	99.11

## JN303351 Rail Supply Group - Supply Chain Survey

**Q15b. Please can you tell me the average value of outstanding overdue invoices that you are chasing Large Companies for**

Base: All excluding don't know

	COMPANY SIZE				SECTOR							TURNOVER (RAIL SECTOR ENTERPRISES)					
	Total	Large - 250+	Large/ Medium 50+	Small 10-49	Micro <10	Civils	Infrastructure	Professional services / Consultancy	Rolling stock manufacturing	Signalling and Communications	Other	Civils/ Infrastructure	More than £36m	More than £10.2m	At least £10.2m but less than £36m	At least £630k but less than £10.2m	Less than £630k
Total	66 100%	3 100%	19 100%	23 100%	24 100%	3 100%	16 100%	21 100%	9 100%	10 100%	20 100%	17 100%	1 100%	7 100%	6 100%	34 100%	25 100%
0	8 12%	1 33%	1 5%	3 13%	4 17%	-	2 13%	1 5%	1 11%	-	6 30%	2 12%	-	-	-	4 12%	4 16%
250	1 2%	-	-	1 4%	-	1 33%	1 6%	-	1 11%	1 10%	-	1 6%	-	-	-	1 3%	-
2000	1 2%	-	-	1 4%	-	-	-	-	-	-	1 5%	-	-	-	-	1 3%	-
2500	2 3%	-	1 5%	-	1 4%	-	-	1 5%	-	-	1 5%	-	-	-	-	-	2 8%
4000	1 2%	-	-	-	1 4%	-	-	1 5%	-	-	-	-	-	-	-	1 3%	-
5500	1 2%	-	-	-	1 4%	-	-	1 5%	-	-	-	-	-	-	-	1 3%	-
7500	1 2%	-	1 5%	-	-	-	-	1 5%	-	-	-	-	-	-	-	1 3%	-
8000	1 2%	-	-	1 4%	-	-	-	-	1 11%	-	-	-	-	-	-	1 3%	-
10000	5 8%	-	1 5%	1 4%	3 13%	-	-	2 10%	-	-	3 15%	-	-	1 14%	1 17%	-	4 16%
15000	1 2%	-	-	-	1 4%	-	-	1 5%	-	-	-	-	-	-	-	-	1 4%
20000	8 12%	-	2 11%	4 17%	2 8%	-	3 19%	2 10%	1 11%	2 20%	1 5%	3 18%	-	-	-	7 21%	1 4%
25000	2 3%	-	-	2 9%	-	-	-	1 5%	-	2 20%	1 5%	-	-	-	-	-	2 8%
30000	3 5%	-	2 11%	-	1 4%	-	1 6%	1 5%	-	-	1 5%	1 6%	-	-	-	1 3%	2 8%
40000	2 3%	-	1 5%	1 4%	-	-	1 6%	1 5%	-	-	-	1 6%	-	1 14%	1 17%	-	1 4%
45000	1 2%	-	-	1 4%	-	1 33%	1 6%	-	-	-	1 5%	1 6%	-	-	-	1 3%	-
50000	9 14%	1 33%	3 16%	2 9%	4 17%	-	4 25%	1 5%	2 22%	2 20%	2 10%	4 24%	-	1 14%	1 17%	4 12%	4 16%
60000	1 2%	-	1 5%	-	-	-	-	-	-	1 10%	-	-	-	1 14%	1 17%	-	-

## JN303351 Rail Supply Group - Supply Chain Survey

**Q15b. Please can you tell me the average value of outstanding overdue invoices that you are chasing Large Companies for**

Base: All excluding don't know

	COMPANY SIZE				SECTOR							TURNOVER (RAIL SECTOR ENTERPRISES)					
	Total	Large - 250+	Large/ Medium 50+	Small 10-49	Micro <10	Civils	Infrastructure	Professional services / Consultancy	Rolling stock manufacturing	Signalling and Communications	Other	Civils/ Infrastructure	More than £36m	More than £10.2m	At least £10.2m but less than £36m	At least £630k but less than £10.2m	Less than £630k
Total	66 100%	3 100%	19 100%	23 100%	24 100%	3 100%	16 100%	21 100%	9 100%	10 100%	20 100%	17 100%	1 100%	7 100%	6 100%	34 100%	25 100%
70000	1 2%	-	-	1 4%	-	-	-	1 5%	-	-	-	-	-	-	-	1 3%	-
75000	1 2%	-	1 5%	-	-	-	1 6%	-	-	-	-	1 6%	-	1 14%	1 17%	-	-
80000	1 2%	-	-	-	1 4%	-	-	-	-	1 10%	1 5%	-	-	-	-	1 3%	-
100000	4 6%	1 33%	2 11%	-	2 8%	-	-	1 5%	1 11%	1 10%	1 5%	-	1 100%	1 14%	-	2 6%	1 4%
200000	3 5%	-	1 5%	1 4%	1 4%	1 33%	-	1 5%	1 11%	-	-	1 6%	-	-	-	2 6%	1 4%
250000	2 3%	-	-	1 4%	1 4%	-	-	2 10%	-	-	-	-	-	-	-	1 3%	1 4%
300000	2 3%	-	-	1 4%	1 4%	-	-	1 5%	-	-	1 5%	-	-	-	-	2 6%	-
1300000	1 2%	-	1 5%	-	-	-	1 6%	-	-	-	-	1 6%	-	1 14%	1 17%	-	-
1500000	1 2%	-	1 5%	-	-	-	1 6%	-	-	-	-	1 6%	-	-	-	1 3%	-
2500000	1 2%	-	-	1 4%	-	-	-	-	1 11%	-	-	-	-	-	-	-	1 4%
5000000	1 2%	-	-	1 4%	-	-	-	1 5%	-	-	-	-	-	-	-	1 3%	-
Don't know	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>NETS</b>																	
1-5,500	6 9%	-	1 5%	2 9%	3 13%	1 33%	1 6%	3 14%	1 11%	1 10%	2 10%	1 6%	-	-	-	4 12%	2 8%
5,501 – 20,000	16 24%	-	4 21%	6 26%	6 25%	-	3 19%	6 29%	2 22%	2 20%	4 20%	3 18%	-	1 14%	1 17%	9 26%	6 24%
20,001 – 50,000	17 26%	1 33%	6 32%	6 26%	5 21%	1 33%	7 44%	4 19%	2 22%	4 40%	5 25%	7 41%	-	2 29%	2 33%	6 18%	9 36%
50,001 – 100,000	8 12%	1 33%	4 21%	1 4%	3 13%	-	1 6%	2 10%	1 11%	3 30%	2 10%	1 6%	1 100%	3 43%	2 33%	4 12%	1 4%

## JN303351 Rail Supply Group - Supply Chain Survey

**Q15b. Please can you tell me the average value of outstanding overdue invoices that you are chasing Large Companies for**

Base: All excluding don't know

	COMPANY SIZE				SECTOR							TURNOVER (RAIL SECTOR ENTERPRISES)					
	Total	Large - 250+	Large/ Medium 50+	Small 10-49	Micro <10	Civils	Infrastructure	Professional services / Consultancy	Rolling stock manufacturing	Signalling and Communications	Other	Civils/ Infrastructure	More than £36m	More than £10.2m	At least £10.2m but less than £36m	At least £630k but less than £10.2m	Less than £630k
Total	66 100%	3 100%	19 100%	23 100%	24 100%	3 100%	16 100%	21 100%	9 100%	10 100%	20 100%	17 100%	1 100%	7 100%	6 100%	34 100%	25 100%
100,001 – 200,000	3 5%	-	1 5%	1 4%	1 4%	1 33%	-	1 5%	1 11%	-	-	1 6%	-	-	-	2 6%	1 4%
200,001 - 1,300,000	5 8%	-	1 5%	2 9%	2 8%	-	1 6%	3 14%	-	-	1 5%	1 6%	-	1 14%	1 17%	3 9%	1 4%
1,300,001 - 5,000,000	3 5%	-	1 5%	2 9%	-	-	1 6%	1 5%	1 11%	-	-	1 6%	-	-	-	2 6%	1 4%
Mean in 000's	207.0	50.0	191.9	376.3	56.6	81.7	203.1	305.3	325.3	43.0	36.8	202.9	100.0	233.6	255.8	251.3	139.2
Standard deviation	711.28	50.00	429.56	1132.22	81.92	104.92	469.13	1079.81	817.99	30.84	68.31	454.23	-	471.09	512.00	878.59	495.54
Standard error	87.55	28.87	98.55	236.08	16.72	60.58	117.28	235.63	272.66	9.75	15.27	110.17	-	178.05	209.02	150.68	99.11

## JN303351 Rail Supply Group - Supply Chain Survey

### Q16. When signing a contract, how many days do you most commonly agree to be paid within?

Base: All respondents

	COMPANY SIZE				SECTOR							TURNOVER (RAIL SECTOR ENTERPRISES)					
	Total	Large - 250+	Large/ Medium 50+	Small 10-49	Micro <10	Civils	Infrastructure	Professional services / Consultancy	Rolling stock manufacturing	Signalling and Communications	Other	Civils/ Infrastructure	More than £36m	More than £10.2m	At least £10.2m but less than £36m	At least £630k but less than £10.2m	Less than £630k
Total	80 100%	7 100%	28 100%	27 100%	25 100%	4 100%	20 100%	27 100%	14 100%	16 100%	23 100%	22 100%	4 100%	12 100%	8 100%	41 100%	26 100%
0 days	1 1%	-	-	-	1 4%	-	-	-	-	-	1 4%	-	-	-	-	1 2%	-
28 days	2 3%	-	1 4%	1 4%	-	-	1 4%	-	-	1 6%	-	-	-	1 8%	1 13%	-	1 4%
30 days	57 71%	6 86%	18 64%	21 78%	18 72%	4 100%	16 80%	21 78%	7 50%	9 56%	17 74%	18 82%	4 100%	10 83%	6 75%	28 68%	19 73%
31 days	1 1%	-	1 4%	-	-	-	-	1 4%	-	-	-	-	-	-	-	1 2%	-
35 days	1 1%	-	1 4%	-	-	-	1 5%	-	-	-	-	1 5%	-	-	-	1 2%	-
42 days	1 1%	-	1 4%	-	-	-	-	-	-	1 6%	-	-	-	1 8%	1 13%	-	-
45 days	3 4%	-	1 4%	1 4%	1 4%	-	-	2 7%	-	1 6%	-	-	-	-	-	2 5%	1 4%
60 days	9 11%	1 14%	2 7%	4 15%	3 12%	-	2 10%	1 4%	3 21%	3 19%	3 13%	2 9%	-	-	-	6 15%	3 12%
90 days	3 4%	-	1 4%	-	2 8%	-	1 5%	1 4%	2 14%	1 6%	2 9%	1 5%	-	-	-	1 2%	1 4%
Don't know	2 3%	-	2 7%	-	-	-	-	-	2 14%	-	-	-	-	-	-	1 2%	1 4%
Mean # of days	36.1	34.3	35.8	34.9	37.8	30.0	36.3	34.4	47.5	40.9	37.8	35.7	30.0	30.8	31.3	36.2	36.5
Standard deviation	15.17	11.34	14.03	11.05	19.90	-	15.63	13.05	23.79	17.81	20.66	14.98	-	3.56	4.40	15.08	15.09
Standard error	1.72	4.29	2.75	2.13	3.98	-	3.50	2.51	6.87	4.45	4.31	3.19	-	1.03	1.56	2.38	3.02

## JN303351 Rail Supply Group - Supply Chain Survey

### Q17. To what extent, if at all, do you consider the issue of late payment to be a problem?

Base: All respondents

	COMPANY SIZE				SECTOR							TURNOVER (RAIL SECTOR ENTERPRISES)					
	Total	Large - 250+	Large/ Medium 50+	Small 10-49	Micro <10	Civils	Infrastructure	Professional services / Consultancy	Rolling stock manufacturing	Signalling and Communications	Other	Civils/ Infrastructure	More than £36m	More than £10.2m	At least £10.2m but less than £36m	At least £630k but less than £10.2m	Less than £630k
Total	80 100%	7 100%	28 100%	27 100%	25 100%	4 100%	20 100%	27 100%	14 100%	16 100%	23 100%	22 100%	4 100%	12 100%	8 100%	41 100%	26 100%
A great extent	26 33%	2 29%	10 36%	8 30%	8 32%	2 50%	7 35%	12 44%	5 36%	5 31%	5 22%	9 41%	2 50%	3 25%	1 13%	14 34%	9 35%
To some extent	37 46%	4 57%	14 50%	13 48%	10 40%	2 50%	12 60%	12 44%	7 50%	8 50%	9 39%	12 55%	1 25%	8 67%	7 88%	17 41%	11 42%
Not at all	16 20%	1 14%	4 14%	5 19%	7 28%	- -	1 5%	3 11%	2 14%	3 19%	8 35%	1 5%	1 25%	1 8%	- -	9 22%	6 23%
Don't know	1 1%	- -	- -	1 4%	- -	- -	- -	- -	- -	- -	1 4%	- -	- -	- -	- -	1 2%	- -
<b>NETS</b>																	
Net: To an extent	63 79%	6 86%	24 86%	21 78%	18 72%	4 100%	19 95%	24 89%	12 86%	13 81%	14 61%	21 95%	3 75%	11 92%	8 100%	31 76%	20 77%

## JN303351 Rail Supply Group - Supply Chain Survey

### Q18. To what extent, if at all, do you feel that you are able to negotiate with large companies over late payment?

Base: All respondents

	COMPANY SIZE				SECTOR							TURNOVER (RAIL SECTOR ENTERPRISES)					
	Total	Large - 250+	Large/ Medium 50+	Small 10-49	Micro <10	Civils	Infrastructure	Professional services / Consultancy	Rolling stock manufacturing	Signalling and Communications	Other	Civils/ Infrastructure	More than £36m	More than £10.2m	At least £10.2m but less than £36m	At least £630k but less than £10.2m	Less than £630k
Total	80 100%	7 100%	28 100%	27 100%	25 100%	4 100%	20 100%	27 100%	14 100%	16 100%	23 100%	22 100%	4 100%	12 100%	8 100%	41 100%	26 100%
I have not felt the need to	11 14%	-	1 4%	6 22%	4 16%	-	1 5%	3 11%	1 7%	3 19%	4 17%	1 5%	-	-	-	7 17%	4 15%
I would like to, but do not feel I can	13 16%	1 14%	4 14%	3 11%	6 24%	1 25%	5 25%	6 22%	-	-	3 13%	5 23%	-	-	-	10 24%	3 12%
I feel I can	52 65%	6 86%	20 71%	17 63%	15 60%	3 75%	13 65%	18 67%	12 86%	12 75%	15 65%	15 68%	3 75%	10 83%	7 88%	22 54%	19 73%
Don't know	4 5%	-	3 11%	1 4%	-	-	1 5%	-	1 7%	1 6%	1 4%	1 5%	1 25%	2 17%	1 13%	2 5%	-

## JN303351 Rail Supply Group - Supply Chain Survey

### Q19. Do you usually negotiate with large companies over late payment?

Base: All who have felt the need to negotiate

	COMPANY SIZE				SECTOR							TURNOVER (RAIL SECTOR ENTERPRISES)					
	Total	Large - 250+	Large/ Medium 50+	Small 10-49	Micro <10	Civils	Infrastructure	Professional services / Consultancy	Rolling stock manufacturing	Signalling and Communications	Other	Civils/ Infrastructure	More than £36m	More than £10.2m	At least £10.2m but less than £36m	At least £630k but less than £10.2m	Less than £630k
Total	65 100%	7 100%	24 100%	20 100%	21 100%	4 100%	18 100%	24 100%	12 100%	12 100%	18 100%	20 100%	3 100%	10 100%	7 100%	32 100%	22 100%
Yes - successfully	38 58%	3 43%	14 58%	13 65%	11 52%	2 50%	11 61%	12 50%	11 92%	9 75%	10 56%	12 60%	2 67%	7 70%	5 71%	16 50%	14 64%
Yes - unsuccessfully	6 9%	1 14%	2 8%	- -	4 19%	- -	1 6%	4 17%	- -	- -	1 6%	1 5%	- -	1 10%	1 14%	5 16%	- -
No	20 31%	3 43%	7 29%	7 35%	6 29%	2 50%	6 33%	7 29%	1 8%	3 25%	7 39%	7 35%	1 33%	2 20%	1 14%	10 31%	8 36%
Don't know	1 2%	- -	1 4%	- -	- -	- -	- -	1 4%	- -	- -	- -	- -	- -	- -	- -	1 3%	- -
<b>NETS</b>																	
Net: Yes	44 68%	4 57%	16 67%	13 65%	15 71%	2 50%	12 67%	16 67%	11 92%	9 75%	11 61%	13 65%	2 67%	8 80%	6 86%	21 66%	14 64%



## JN303351 Rail Supply Group - Supply Chain Survey

### Q20. On whose payment terms do you normally contract?

Base: All respondents

	COMPANY SIZE				SECTOR							TURNOVER (RAIL SECTOR ENTERPRISES)					
	Total	Large - 250+	Large/ Medium 50+	Small 10-49	Micro <10	Civils	Infrastructure	Professional services / Consultancy	Rolling stock manufacturing	Signalling and Communications	Other	Civils/ Infrastructure	More than £36m	More than £10.2m	At least £10.2m but less than £36m	At least £630k but less than £10.2m	Less than £630k
Total	80 100%	7 100%	28 100%	27 100%	25 100%	4 100%	20 100%	27 100%	14 100%	16 100%	23 100%	22 100%	4 100%	12 100%	8 100%	41 100%	26 100%
My company's standard payment terms	32 40%	4 57%	10 36%	13 48%	9 36%	1 25%	9 45%	12 44%	6 43%	8 50%	11 48%	10 45%	3 75%	5 42%	2 25%	15 37%	11 42%
The Large Company's standard payment terms	36 45%	2 29%	14 50%	9 33%	13 52%	1 25%	9 45%	12 44%	5 36%	5 31%	9 39%	9 41%	-	4 33%	4 50%	21 51%	11 42%
Other	12 15%	1 14%	4 14%	5 19%	3 12%	2 50%	2 10%	3 11%	3 21%	3 19%	3 13%	3 14%	1 25%	3 25%	2 25%	5 12%	4 15%

## JN303351 Rail Supply Group - Supply Chain Survey

### Q22. Does your company operate in sectors other than rail?

Base: All respondents

	COMPANY SIZE				SECTOR							TURNOVER (RAIL SECTOR ENTERPRISES)					
	Total	Large - 250+	Large/ Medium 50+	Small 10-49	Micro <10	Civils	Infrastructure	Professional services / Consultancy	Rolling stock manufacturing	Signalling and Communications	Other	Civils/ Infrastructure	More than £36m	More than £10.2m	At least £10.2m but less than £36m	At least £630k but less than £10.2m	Less than £630k
Total	80 100%	7 100%	28 100%	27 100%	25 100%	4 100%	20 100%	27 100%	14 100%	16 100%	23 100%	22 100%	4 100%	12 100%	8 100%	41 100%	26 100%
Yes	61 76%	4 57%	20 71%	21 78%	20 80%	3 75%	16 80%	19 70%	12 86%	11 69%	19 83%	18 82%	2 50%	7 58%	5 63%	29 71%	24 92%
No	19 24%	3 43%	8 29%	6 22%	5 20%	1 25%	4 20%	8 30%	2 14%	5 31%	4 17%	4 18%	2 50%	5 42%	3 38%	12 29%	2 8%

## JN303351 Rail Supply Group - Supply Chain Survey

**Q23\_SUM.** For each of the issues covered in this survey, would you say they are more or less of a problem in the rail sector than in other sectors, or are they about the same?

### SUMMARY TABLE

Base: All whose company operates in sectors other than rail

	Total	More of a problem	No more or no less of a problem	Less of a problem	Don't know
NDA's	61	3	42	11	5
	100%	5%	69%	18%	8%
Substitution	61	7	32	17	5
	100%	11%	52%	28%	8%
Late Payment	61	7	37	14	3
	100%	11%	61%	23%	5%

## JN303351 Rail Supply Group - Supply Chain Survey

**Q23\_1. For each of the issues covered in this survey, would you say they are more or less of a problem in the rail sector than in other sectors, or are they about the same?**

### NDA's

Base: All whose company operates in sectors other than rail

	COMPANY SIZE				SECTOR							TURNOVER (RAIL SECTOR ENTERPRISES)					
	Total	Large - 250+	Large/ Medium 50+	Small 10-49	Micro <10	Civils	Infrastructure	Professional services / Consultancy	Rolling stock manufacturing	Signalling and Communications	Other	Civils/ Infrastructure	More than £36m	More than £10.2m	At least £10.2m but less than £36m	At least £630k but less than £10.2m	Less than £630k
Total	61 100%	4 100%	20 100%	21 100%	20 100%	3 100%	16 100%	19 100%	12 100%	11 100%	19 100%	18 100%	2 100%	7 100%	5 100%	29 100%	24 100%
More of a problem	3 5%	-	-	-	3 15%	-	1 6%	2 11%	-	-	2 11%	1 6%	-	-	-	1 3%	2 8%
No more or no less of a problem	42 69%	2 50%	14 70%	17 81%	11 55%	2 67%	12 75%	15 79%	7 58%	9 82%	10 53%	13 72%	1 50%	4 57%	3 60%	21 72%	16 67%
Less of a problem	11 18%	1 25%	5 25%	3 14%	3 15%	-	3 19%	-	4 33%	1 9%	5 26%	3 17%	-	2 29%	2 40%	6 21%	3 13%
Don't know	5 8%	1 25%	1 5%	1 5%	3 15%	1 33%	-	2 11%	1 8%	1 9%	2 11%	1 6%	1 50%	1 14%	-	1 3%	3 13%

## JN303351 Rail Supply Group - Supply Chain Survey

**Q23\_2. For each of the issues covered in this survey, would you say they are more or less of a problem in the rail sector than in other sectors, or are they about the same?**

### Substitution

Base: All whose company operates in sectors other than rail

	COMPANY SIZE				SECTOR							TURNOVER (RAIL SECTOR ENTERPRISES)					
	Total	Large - 250+	Large/ Medium 50+	Small 10-49	Micro <10	Civils	Infrastructure	Professional services / Consultancy	Rolling stock manufacturing	Signalling and Communications	Other	Civils/ Infrastructure	More than £36m	More than £10.2m	At least £10.2m but less than £36m	At least £30k but less than £10.2m	Less than £30k
Total	61 100%	4 100%	20 100%	21 100%	20 100%	3 100%	16 100%	19 100%	12 100%	11 100%	19 100%	18 100%	2 100%	7 100%	5 100%	29 100%	24 100%
More of a problem	7 11%	1 25%	3 15%	1 5%	3 15%	- -	2 13%	2 11%	2 17%	1 9%	2 11%	2 11%	- -	2 29%	2 40%	2 7%	3 13%
No more or no less of a problem	32 52%	1 25%	9 45%	12 57%	11 55%	2 67%	8 50%	14 74%	4 33%	6 55%	8 42%	9 50%	1 50%	1 14%	- -	17 59%	13 54%
Less of a problem	17 28%	1 25%	7 35%	6 29%	4 20%	- -	5 31%	2 11%	5 42%	3 27%	7 37%	5 28%	- -	3 43%	3 60%	8 28%	6 25%
Don't know	5 8%	1 25%	1 5%	2 10%	2 10%	1 33%	1 6%	1 5%	1 8%	1 9%	2 11%	2 11%	1 50%	1 14%	- -	2 7%	2 8%

## JN303351 Rail Supply Group - Supply Chain Survey

**Q23\_3. For each of the issues covered in this survey, would you say they are more or less of a problem in the rail sector than in other sectors, or are they about the same?**

### Late Payment

Base: All whose company operates in sectors other than rail

	COMPANY SIZE				SECTOR							TURNOVER (RAIL SECTOR ENTERPRISES)					
	Total	Large - 250+	Large/ Medium 50+	Small 10-49	Micro <10	Civils	Infrastructure	Professional services / Consultancy	Rolling stock manufacturing	Signalling and Communications	Other	Civils/ Infrastructure	More than £36m	More than £10.2m	At least £10.2m but less than £36m	At least £630k but less than £10.2m	Less than £630k
Total	61 100%	4 100%	20 100%	21 100%	20 100%	3 100%	16 100%	19 100%	12 100%	11 100%	19 100%	18 100%	2 100%	7 100%	5 100%	29 100%	24 100%
More of a problem	7 11%	1 25%	1 5%	2 10%	4 20%	1 33%	2 13%	4 21%	1 8%	- -	2 11%	3 17%	- -	1 14%	1 20%	3 10%	3 13%
No more or no less of a problem	37 61%	1 25%	12 60%	14 67%	11 55%	1 33%	12 75%	12 63%	7 58%	8 73%	10 53%	12 67%	1 50%	3 43%	2 40%	19 66%	14 58%
Less of a problem	14 23%	1 25%	6 30%	4 19%	4 20%	- -	2 13%	2 11%	3 25%	2 18%	6 32%	2 11%	- -	2 29%	2 40%	6 21%	6 25%
Don't know	3 5%	1 25%	1 5%	1 5%	1 5%	1 33%	- -	1 5%	1 8%	1 9%	1 5%	1 6%	1 50%	1 14%	- -	1 3%	1 4%

## JN303351 Rail Supply Group - Supply Chain Survey

**Q24\_SUM.** And finally, for each of the issues covered in this survey, for which of the following end clients, if any, are these particularly prevalent?

### SUMMARY TABLE

Base: All respondents

	NDAs	Substitution	Late Payment
Total	80 100%	80 100%	80 100%
Network Rail	14 18%	10 13%	15 19%
TfL	6 8%	5 6%	4 5%
HS1	2 3%	1 1%	- -
HS2	3 4%	1 1%	1 1%
CrossRail	5 6%	3 4%	3 4%
Department for Transport (including Scotland)	2 3%	1 1%	- -
A Train Operating Company	9 11%	6 8%	9 11%
A Passenger Transport Executive	2 3%	- -	3 4%
Don't know	3 4%	3 4%	2 3%
None	55 69%	60 75%	51 64%

## JN303351 Rail Supply Group - Supply Chain Survey

**Q24. And finally, for each of the issues covered in this survey, for which of the following end clients, if any, are these particularly prevalent?**

### NDA's

Base: All respondents

	COMPANY SIZE				SECTOR							TURNOVER (RAIL SECTOR ENTERPRISES)					
	Total	Large - 250+	Large/ Medium 50+	Small 10-49	Micro <10	Civils	Infrastructure	Professional services / Consultancy	Rolling stock manufacturing	Signalling and Communications	Other	Civils/ Infrastructure	More than £36m	More than £10.2m	At least £10.2m but less than £36m	At least £630k but less than £10.2m	Less than £630k
Total	80 100%	7 100%	28 100%	27 100%	25 100%	4 100%	20 100%	27 100%	14 100%	16 100%	23 100%	22 100%	4 100%	12 100%	8 100%	41 100%	26 100%
Network Rail	14 18%	1 14%	6 21%	4 15%	4 16%	2 50%	3 15%	4 15%	1 7%	6 38%	3 13%	5 23%	1 25%	5 42%	4 50%	4 10%	5 19%
A Train Operating Company	9 11%	2 29%	4 14%	5 19%	-	1 25%	1 5%	3 11%	5 36%	3 19%	2 9%	2 9%	2 50%	4 33%	2 25%	4 10%	1 4%
TfL	6 8%	2 29%	2 7%	3 11%	1 4%	1 25%	1 5%	3 11%	3 21%	3 19%	1 4%	2 9%	2 50%	2 17%	-	2 5%	2 8%
CrossRail	5 6%	2 29%	3 11%	2 7%	-	1 25%	2 10%	2 7%	2 14%	3 19%	2 9%	3 14%	2 50%	2 17%	-	3 7%	-
HS2	3 4%	1 14%	2 7%	1 4%	-	1 25%	-	2 7%	1 7%	2 13%	1 4%	1 5%	1 25%	1 8%	-	2 5%	-
HS1	2 3%	1 14%	1 4%	1 4%	-	1 25%	-	1 4%	1 7%	2 13%	1 4%	1 5%	1 25%	1 8%	-	1 2%	-
Department for Transport (including Scotland)	2 3%	1 14%	1 4%	1 4%	-	1 25%	-	1 4%	1 7%	2 13%	1 4%	1 5%	1 25%	1 8%	-	1 2%	-
A Passenger Transport Executive	2 3%	1 14%	1 4%	1 4%	-	1 25%	-	1 4%	1 7%	2 13%	1 4%	1 5%	1 25%	1 8%	-	1 2%	-
Don't know	3 4%	1 14%	2 7%	-	1 4%	-	1 5%	-	-	-	2 9%	1 5%	1 25%	1 8%	-	-	2 8%
None	55 69%	4 57%	18 64%	17 63%	20 80%	2 50%	15 75%	20 74%	8 57%	10 63%	17 74%	15 68%	1 25%	5 42%	4 50%	31 76%	18 69%



## JN303351 Rail Supply Group - Supply Chain Survey

**Q24. And finally, for each of the issues covered in this survey, for which of the following end clients, if any, are these particularly prevalent?**

### Substitution

Base: All respondents

	COMPANY SIZE				SECTOR							TURNOVER (RAIL SECTOR ENTERPRISES)					
	Total	Large - 250+	Large/ Medium 50+	Small 10-49	Micro <10	Civils	Infrastructure	Professional services / Consultancy	Rolling stock manufacturing	Signalling and Communications	Other	Civils/ Infrastructure	More than £36m	More than £10.2m	At least £10.2m but less than £36m	At least £630k but less than £10.2m	Less than £630k
Total	80 100%	7 100%	28 100%	27 100%	25 100%	4 100%	20 100%	27 100%	14 100%	16 100%	23 100%	22 100%	4 100%	12 100%	8 100%	41 100%	26 100%
Network Rail	10 13%	1 14%	3 11%	5 19%	2 8%	2 50%	5 25%	3 11%	1 7%	2 13%	1 4%	6 27%	- -	3 25%	3 38%	5 12%	2 8%
A Train Operating Company	6 8%	1 14%	2 7%	3 11%	1 4%	- -	1 5%	2 7%	3 21%	1 6%	1 4%	1 5%	1 25%	2 17%	1 13%	3 7%	1 4%
TfL	5 6%	1 14%	1 4%	3 11%	1 4%	- -	3 15%	2 7%	1 7%	1 6%	1 4%	3 14%	1 25%	1 8%	- -	4 10%	- -
CrossRail	3 4%	1 14%	1 4%	1 4%	1 4%	- -	2 10%	1 4%	1 7%	- -	1 4%	2 9%	1 25%	1 8%	- -	2 5%	- -
HS1	1 1%	- -	- -	1 4%	- -	- -	- -	- -	1 7%	1 6%	1 4%	- -	- -	- -	- -	1 2%	- -
HS2	1 1%	- -	- -	1 4%	- -	- -	- -	- -	1 7%	1 6%	1 4%	- -	- -	- -	- -	1 2%	- -
Department for Transport (including Scotland)	1 1%	- -	- -	1 4%	- -	- -	- -	- -	1 7%	1 6%	1 4%	- -	- -	- -	- -	1 2%	- -
A Passenger Transport Executive	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -
Don't know	3 4%	1 14%	2 7%	- -	1 4%	- -	1 5%	- -	- -	- -	2 9%	1 5%	1 25%	1 8%	- -	- -	2 8%
None	60 75%	4 57%	22 79%	17 63%	21 84%	2 50%	13 65%	22 81%	9 64%	13 81%	17 74%	14 64%	2 50%	7 58%	5 63%	31 76%	21 81%

## JN303351 Rail Supply Group - Supply Chain Survey

**Q24. And finally, for each of the issues covered in this survey, for which of the following end clients, if any, are these particularly prevalent?**

### Late Payment

Base: All respondents

	COMPANY SIZE				SECTOR							TURNOVER (RAIL SECTOR ENTERPRISES)					
	Total	Large - 250+	Large/ Medium 50+	Small 10-49	Micro <10	Civils	Infrastructure	Professional services / Consultancy	Rolling stock manufacturing	Signalling and Communications	Other	Civils/ Infrastructure	More than £36m	More than £10.2m	At least £10.2m but less than £36m	At least £630k but less than £10.2m	Less than £630k
Total	80 100%	7 100%	28 100%	27 100%	25 100%	4 100%	20 100%	27 100%	14 100%	16 100%	23 100%	22 100%	4 100%	12 100%	8 100%	41 100%	26 100%
Network Rail	15 19%	2 29%	4 14%	6 22%	5 20%	1 25%	5 25%	8 30%	1 7%	1 6%	2 9%	6 27%	1 25%	4 33%	3 38%	5 12%	6 23%
A Train Operating Company	9 11%	1 14%	3 11%	4 15%	2 8%	- -	- -	6 22%	2 14%	- -	1 4%	- -	- -	- -	- -	4 10%	5 19%
TfL	4 5%	- -	3 11%	- -	1 4%	- -	2 10%	2 7%	- -	- -	- -	2 9%	1 25%	2 17%	1 13%	2 5%	- -
CrossRail	3 4%	- -	2 7%	- -	1 4%	- -	3 15%	- -	- -	1 6%	- -	3 14%	1 25%	1 8%	- -	1 2%	1 4%
A Passenger Transport Executive	3 4%	1 14%	1 4%	- -	2 8%	- -	1 5%	2 7%	- -	- -	2 9%	1 5%	1 25%	1 8%	- -	- -	2 8%
HS2	1 1%	- -	1 4%	- -	- -	- -	- -	1 4%	- -	- -	- -	- -	- -	- -	- -	1 2%	- -
HS1	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -
Department for Transport (including Scotland)	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -
Don't know	2 3%	- -	1 4%	- -	1 4%	- -	1 5%	- -	- -	- -	1 4%	1 5%	- -	- -	- -	- -	2 8%
None	51 64%	4 57%	16 57%	19 70%	16 64%	3 75%	11 55%	13 48%	11 79%	14 88%	19 83%	12 55%	2 50%	6 50%	4 50%	30 73%	14 54%