

NOP Consumer Market Research  
 Ludgate House  
 245 Blackfriars Road  
 London SE1 9UL

Job No.	Card		Ser. No.
(1)-(6)	(7)	(8)	(9)-(12)
430842	0	1	

Issue: 1.  
 Date: 11/10/99  
 Job No.: J430842

**FLASH 72**

COMPANY NAME: \_\_\_\_\_

D & B REFERENCE: \_\_\_\_\_  
 (take from sample)

TEL. NO. \_\_\_\_\_

NUTS REGION: \_\_\_\_\_

SIC CODE: \_\_\_\_\_  
 (take from sample)

NO. OF EMPLOYEES: \_\_\_\_\_  
 (take from sample)

**RESULT OF CONTACT**

Call No	Inter-viewers ID	Date	Time	Length	Dispos-ition	Comments	Unit s
1.							
2.							
3.							
4.							
5.							
6.							
7.							
8.							

**STANDARD DIAL DISPOSITION CODES**

NR	- No reply	HHR	- Household/Company refusal
ENG	- Circuit Engaged	RR	- Respondent Refusal
NU	- No. unobtainable (Not a working no.)	ANS	- Answerphone
NNAS	- No. Not applicable to study(home telephone if business no. if consumer study)	REJ	- Reject (Respondent who might be otherwise eligible but is deaf, intoxicated, abusive or unwilling or unable to provide usable information)
LB	- Language barrier	COMP	- Completed interviews (segregated by type)
SRNA	- Selected respondent not available	PART	- Partial (interview terminated by respondent before completion)
CUTS	- Contact unable to speak for H.Hold		
INEL	- H.Hold/Business ineligible for specific reason		

		Code	Route
	<b>INTERVIEWER:</b> <ul style="list-style-type: none"> <li>• IF NAMED CONTACT GIVEN, ASK TO SPEAK TO THAT PERSON</li> <li>• IF NO CONTACT GIVEN, ASK TO SPEAK TO A SENIOR MANAGER</li> </ul> <p>Hello, I am ... from NOP Research, an independent market research company. We are carrying out a survey amongst senior managers about their dealings with other countries in the European Union. It will take about 10 minutes - is it convenient to talk to you now?</p>		
	Yes	1	Cont
	No	2	Arrange recall
	Refused	3	Thank & Close
Q.A1	First of all I would like to check a few details about your company. What is the main business activity of the company. Is it ... <b>READ OUT EACH PRECODE - ONE ANSWER ONLY</b>	Agriculture, Mining, Extraction Hotel, restaurant, café Consumer services such as laundry, hairdressing, shoe repairs	NA NA NA Thank & Close
	Construction, Civil Engineering	1	Q.A2
	Manufacturing	2	
	Distribution (wholesale/retail)	3	
	Transport	4	
	Financial services	5	
	Business Services	6	
	Services in general	7	
	Other (SPECIFY) _____	8	
	DK	NA	Check Whether Qualifies Before Continuing Thank & Close
QA2	What exactly is your position in the company? <b>RECORD</b> _____ _____ <b>AND THEN CODE INTO RELEVANT JOB FUNCTION</b> General management/Chairman/Chief Executive Officer/Managing Director/Board Director Manager - most senior person with responsibility for operations in the European Union Other senior member of managing staff responsible for European Union affairs Import/Export Manager Other Senior Manager	1 2 3 4 5	*See Insts

**INTERVIEWER:**

- CHECK THAT RESPONDENT IS A MANAGER BEFORE CONTINUING

		Code	Route
QA3	How many people does your company regularly employ in Britain?  <hr/> <b>(RECORD NUMBER)</b>		*See Insts
	<b>INTERVIEWER</b> • IF FIGURE GIVEN IS LESS THAN 20, THANK AND CLOSE • REST CONTINUE		
Q.A4	Does your company sell directly to, purchase from or produce goods or services in countries outside of Britain and, in particular in ... <b>READ OUT PRECODES.</b> <b>MULTI ANSWERS POSSIBLE</b>	Directly adjacent/ neighbouring European Union Countries In other European Union countries In Western Europe but outside the European Union In Eastern Europe or Russia In other countries (No activities outside Britain) DK/NA	1 2 3 4 5 6 7 QA5 Thank & Close
QA5	In which year did your company begin operating?	1997 - 1999 1993 - 1996 1988 - 1992 1983 - 1987 1978 - 1982 1973 - 1977 1968 - 1972 Before 1968 DK/NA	1 2 3 4 5 6 7 8 9 QA6 Thank & Close
QA6	Does your company operate ... <b>READ OUT PRECODES</b>  <b>ONE ANSWER ONLY</b>	Independently of any link with other companies or holding company As an independent member of a group of companies As an autonomous subsidiary of a parent company As a department of another company (Other (GIVE DETAILS)) DK/NA	1 2 3 4 5 6 QA7 Thank & Close

								Code	Route
QA 7	In the last two years, what has happened to the total turnover of your company? Has it ... <b>READ OUT PRECODES</b> <b>ONE ANSWER ONLY ALLOWED</b>		Increased substantially					1	
			Increased					2	
			Remained unchanged					3	
			Decreased					4	
			Decreased substantially					5	
			DK/NA					6	QA8
QA8	And what has happened to the company's..... <b>READ OUT EACH ITEM</b>								
a)	market share in Britain? <b>ONE ANSWER ONLY</b>								
b)	export sales within the European Union? <b>ONE ANSWER ONLY</b>								
c)	employment volume? <b>ONE ANSWER ONLY</b>								
d)	capital investment? <b>ONE ANSWER ONL</b>								
e)	range of new products/services? <b>ONE ANSWER ONLY</b>								
			Increased substantially	Increase -ed	Remain- ed unchang ed	Dec- reased	Dec- reased substant -ially	DK/NA	
a)	Market share	()	1	2	3	4	5	6	
b)	Export sales	()	1	2	3	4	5	6	
c)	Number employed	()	1	2	3	4	5	6	
d)	Capital investment	()	1	2	3	4	5	6	
e)	Range of new products/services	()	1	2	3	4	5	6	QA9
QA9	At the moment, to which or in which European Union countries other than the United Kingdom, does your company ..... <b>READ OUT</b>								
a)	export goods or services ?								
b)	directly source goods or services ?								
c)	manufacture goods or services locally? <b>MULTI ANSWERS POSSIBLE</b>								
			a)	b)	c)	d)			
	Belgium		1	1	1	1			
	Denmark		1	1	1	1			
	Germany		1	1	1	1			
	Greece		1	1	1	1			
	Spain		1	1	1	1			
	Finland		1	1	1	1			
	France		1	1	1	1			
	Ireland		1	1	1	1			
	Italy		1	1	1	1			
	Luxembourg		1	1	1	1			
	Netherlands		1	1	1	1			
	Austria		1	1	1	1			
	Portugal		1	1	1	1			
	Sweden		1	1	1	1			
	United Kingdom		NA	NA	NA	NA			*See
	None		1	1	1	1			Insts

		Code	Route																																																							
	<p><b>INTERVIEWER:</b></p> <ul style="list-style-type: none"> <li>• <b>IF NONE AT Q.A9a) AND b) AND c) – ASK Q 4 AGAIN. THANK AND CLOSE.</b></li> <li>• <b>REST CONTINUE</b></li> </ul> <p>I would now like to ask you a few questions about the functioning of the European Union's single market and about the obstacles that may still inhibit your company's trade or business in other countries of the European Union.</p>																																																									
QB1	<p>In the last two years, would you say that the obstacles formerly restricting your company's business within the European Union ... <b>READ OUT PRECODES ONE ANSWER ONLY ALLOWED</b></p>	<p>Have disappeared altogether 1</p> <p>Have been significantly reduced 2</p> <p>Are tending to decrease 3</p> <hr/> <p>Have remained unchanged 4</p> <p>OR</p> <p>On the contrary, have tended to increase or multiply 5</p> <hr/> <p>(Company has never encountered any obstacles) 6</p> <hr/> <p>(DK/NA) 7</p>	<p>QB2</p> <p>QB3</p> <p>QB6</p> <p>QB4</p>																																																							
QB2	<p>So, you say that the obstacles to trade or business for your company in the European Union have ... <b>(ANSWER AT Q.B1)</b> during the last two years. In your view, can this improvement be attributed primarily, secondarily or not at all to ... <b>READ OUT EACH STATEMENT</b></p>	<table border="1"> <thead> <tr> <th></th> <th>Primarily</th> <th>Secondarily</th> <th>Not at all</th> <th>DK/NA</th> </tr> </thead> <tbody> <tr> <td>a) Better enforcement of rules throughout the Single Market</td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> </tr> <tr> <td>b) liberalisation of the previously closed national markets</td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> </tr> <tr> <td>c) increased harmonisation of national legislation due to the Single Market</td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> </tr> <tr> <td>d) introduction of the Euro</td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> </tr> <tr> <td>e) more open attitude from public authorities towards imported goods or services</td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> </tr> <tr> <td>f) reduced administrative burdens for trading cross-border</td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> </tr> <tr> <td>g) improved access to information on Single Market rules</td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> </tr> <tr> <td>h) better knowledge on your part about the operation of the other European Union countries' markets</td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> </tr> <tr> <td>i) improved communications and transport conditions</td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> </tr> <tr> <td>j) (Other (SPECIFY))</td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> </tr> </tbody> </table>		Primarily	Secondarily	Not at all	DK/NA	a) Better enforcement of rules throughout the Single Market	1	2	3	4	b) liberalisation of the previously closed national markets	1	2	3	4	c) increased harmonisation of national legislation due to the Single Market	1	2	3	4	d) introduction of the Euro	1	2	3	4	e) more open attitude from public authorities towards imported goods or services	1	2	3	4	f) reduced administrative burdens for trading cross-border	1	2	3	4	g) improved access to information on Single Market rules	1	2	3	4	h) better knowledge on your part about the operation of the other European Union countries' markets	1	2	3	4	i) improved communications and transport conditions	1	2	3	4	j) (Other (SPECIFY))	1	2	3	4	<p>QB4</p>
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					Code	Route
QB3	So, you say that the obstacles to trade or business of your company in the European Union ... <b>(ANSWER AT Q.B1)</b> during the last two years. In your view, can this situation be attributed primarily, secondarily or not at all to ... <b>READ OUT EACH STATEMENT</b>					
		Primarily	Secondarily	Not at all	DK/NA	
a)	Inadequate rules at the European level for your area of activity?	1	2	3	4	
b)	European rules being applied differently in each European Union country?	1	2	3	4	
c)	European rules being too complex or unclear to be applied properly?	1	2	3	4	
d)	Discrimination by officials on the grounds of nationality?	1	2	3	4	
e)	Lack of familiarity on the part of officials with the European rules that are applicable?	1	2	3	4	
f)	European rules being misinterpreted by the national administrations?	1	2	3	4	
g)	Difficulty in accessing the right information about which European rules are applicable?	1	2	3	4	
h)	inadequacy of the market surveillance mechanisms within the European Union?	1	2	3	4	
i)	Your lack of information on the way the other European Unions markets operate currently?	1	2	3	4	
j)	Other reasons (SPECIFY AND PROPE AS TO WHETHER PRIMARY OR SECONDARY REASON)	1	2	3	4	
	1) _____	1	2	NA	NA	
	2) _____	1	2	NA	NA	
	3) _____	1	2	NA	NA	QB4

				Code	Route
QB4	In your experience, does your company currently face any of the following obstacles, at least in certain cases or in relation to certain European Union countries.				
	<b>READ OUT EACH STATEMENT - ROTATE ORDER OF READING OUT ITEMS a)-n)</b>				
	<b>ONE ANSWER FOR EACH STATEMENT.</b>				
		Yes	No	DK/NA	
a)	the outright refusal (by public authorities) to grant permission to sell products or services in their country which are already legally marketed in other European Union countries	1	2	3	
b)	additional costs to render your products or services compatible with different national specifications	1	2	3	
c)	unusual testing, certification or approval procedures	1	2	3	
d)	difficulties related to the VAT system and procedures	1	2	3	
e)	costly financing arrangements for cross-border transactions	1	2	3	
f)	restrictions placed on market access due to the existence of exclusive distribution networks	1	2	3	
g)	market access requires rights or licences which are already in the hands of your local competitors	1	2	3	
h)	state aid favouring your competitors	1	2	3	
l)	discriminatory tax treatment of your operations	1	2	3	
j)	discriminatory practices of awarding authorities when you try to access public procurement markets	1	2	3	
k)	lack of legal security of cross-border contracts/transactions	1	2	3	
l)	insufficient action against piracy and counterfeiting	1	2	3	
m)	requirement to establish (a branch) in a member state before services can be provided there	1	2	3	
n)	double payments on social security for your personnel temporarily posted abroad	1	2	3	
o)	other legislative or regulatory obstacles	1	2	3	
	(SPECIFY)	1	2	3	
	i) _____				
	ii) _____				
	iii) _____				
					QB5a

			Code	Route
QB5a	In your experience, which of these two opinions corresponds most closely to today's reality? <b>READ OUT EACH STATEMENT ONE ANSWER ONLY</b>	a) In one or two European Union Countries, these obstacles are significantly more frequent or more difficult to overcome on average	1	QB5b
		b) These obstacles are roughly the same everywhere but they seem more difficult in those countries where it is most important to do business	2	
		DK/NA	3	QB6a
QB5b	In which countries are these regulatory issues more frequent or more difficult to overcome than usual? <b>DO NOT PROMPT MULTI ANSWERS ALLOWED</b>	Belgium	1	QB6a
		Denmark	1	
		Germany	1	
		Greece	1	
		Spain	1	
		Finland	1	
		France	1	
		Ireland	1	
		Italy	1	
		Luxembourg	1	
		Netherlands	1	
		Austria	1	
		Portugal	1	
		Sweden	1	
		United Kingdom	NA	
None	1			
QB6a	Now I would like to ask a broader question concerning the European Union single market, its framework of rules and practices, and the operating conditions for companies like yours. Using a scale of 1 to 10 where a score of 1 would mean off-putting and under-performing and a score of 10 would mean open and well-functioning and ratings between 2 and 9 lie in between these extremes; how would you rate the current functioning of the EUROPEAN UNION SINGLE MARKET	_____		QB6b
		(WRITE IN SCORE 1 - 10)		
		DK/NA	V	QB6c
QB6b	In the knowledge that today you would give a rating of ... <b>(ANSWER AT Q.B6a)</b> out of 10 for how the European Union's single market functions, what would have been your rating TWO YEARS AGO (again on a scale of 1 - 10) <b>REPEAT MEANING OF SCALE IF REQUESTED</b>	_____		
		(WRITE IN SCORE)		
		DK/NA	V	QB6c

		Code	Route
QB6c	<p>And, in your opinion, on the same evaluation scale ranging from 1 to 10 how would you rate the current functioning of Britain with its own framework of rules and practices, and the operating conditions for companies like yours?</p> <p>(WRITE IN SCORE)</p> <p>DK/NA</p> <p><b>REPEAT MEANING OF SCALE IF REQUESTED</b></p>	V	QC1
QC1	<p>In the last two years, has your company recruited, tried to recruit or planned to recruit staff in another European Union country?</p> <p><b>PROBE TO PRECODES, IF REQUIRED</b></p> <p><b>ONE ANSWER ONLY</b></p>	<p>Yes, has recruited 1</p> <p>Yes, tried to recruit but did not find suitable candidates 2</p> <p>Yes, considered recruiting but did not actually engage in the process 3</p> <p>No, only recruited in Britain not in another European Union country 4</p> <p>No, no recruitment at all over the last 2 years 5</p> <p>(DK/NA – not responsible for human resources) 6</p>	<p>QD1</p> <p>QC2</p> <p>QD1</p>
QC2	<p>Why did your company not recruit outside Britain?</p> <p><b>PROBE TO PRECODES IF NECESSARY</b></p> <p><b>MULTI ANSWERS ALLOWED</b></p>	<p>Local labour is readily available 1</p> <p>Too expensive to advertise/recruit abroad 1</p> <p>Not worth the effort 1</p> <p>Language barriers 1</p> <p>Qualifications are different 1</p> <p>Salary package would not be attractive to foreigners 1</p> <p>Too many administrative burdens 1</p> <p>Tax barriers 1</p> <p>Social Security schemes favour the recruitment of local labour 1</p> <p>Resistance from local workforce 1</p> <p>Wouldn't know where to start 1</p> <p>Other (SPECIFY) 1</p> <p>DK/NA 1</p>	QD1

		Code	Route
	Companies are increasingly using services provided by other businesses (business services) to perform some functions that are no longer undertaken or that cannot be undertaken in-house.		
QD1	I am going to read out a few of these business services to you. For each of them, could you please tell me whether your company has used it over the last 2 years and, if you contracted out this work, whether your suppliers were based in Britain, in another European Union country, or outside the European Union.		
		Used service but work done in-house	Purchased from local supplier
		Purchased from supplier(s) based in another European Union country	Purchased from supplier(s) based outside the European Union
		Not used service the last 2 years	DK/NA
	<b><u>IT (COMMUNICATION) SERVICES</u></b>		
a)	Hardware consultancy	1	2
b)	Software consultancy	1	2
	<b><u>HUMAN RESOURCES SERVICE</u></b>		
c)	Labour recruitment	1	2
d)	Training & educational services	1	2
	<b><u>ADMINISTRATION SERVICES</u></b>		
e)	Legal services	1	2
f)	Accounting, bookkeeping and auditing	1	2
g)	Business management and consultancy	1	2
	<b><u>PRODUCTION RELATED SERVICES</u></b>		
h)	Engineering activities	1	2
i)	Architect	1	2
j)	Technical testing and activities	1	2
	<b><u>TRANSPORT &amp; DISTRIBUTION</u></b>		
k)	Transport services	1	2
l)	Leasing & renting	1	2
m)	Packaging services	1	2
	<b><u>MARKETING &amp; SALES</u></b>		
n)	Market research	1	2
o)	Advertising	1	2

**INTERVIEWER:**

- IF AT LEAST ONE CODE 3 USED AT Q.D1, ASK Q.D2
- IF NO CODE "3" USED FOR ANY ITEM GO TO Q.D3

			Code	Route
QD2a	In your efforts to source services from other European countries, has your company faced obstacles that either increased the costs of the transactions or restricted your company's abilities to conduct cross-border transactions?	Yes	1	QD2b
		No	2	
		DK/NA	3	QE1
QD2b	What sort of obstacles did you face? <b>PROBE TO PRECODES, IF NECESSARY</b> <b>MULTI ANSWERS ALLOWED</b>	Lack of legal security for cross-border contracts	1	QE1
		Administrative obstacles in Britain	1	
		Administrative obstacles in the service providers country	1	
		Problems with licences or lack of recognition of professional qualifications	1	
		Fiscal (VAT) problems	1	
		Inappropriate redress mechanisms to deal with breaches of contracts	1	
		(Other – SPECIFY) _____	1	
		DK/NA	1	
QD3a	Has your company considered purchasing services from another European Union country?	Yes	1	QD3b
		No	2	
		DK/NA	3	QE1
QD3b	What obstacles did you face that made you give up the idea of purchasing services from another European Union country? <b>PROBE TO PRECODES IF NECESSARY</b> <b>MULTI ANSWERS ALLOWED</b>	Lack of legal security for cross-border contracts	1	QE1
		Administrative obstacles in Britain	1	
		Administrative obstacles in the service provider's country	1	
		Problems with licences or lack of recognition of professional qualifications	1	
		Fiscal (VAT) problems	1	
		Inappropriate redress mechanisms to deal with breaches of contracts	1	
		(Other – SPECIFY) _____	1	
		DK/NA	1	

			Code	Route
	Now I would like to ask you a few questions related to what is called "Information Society Services", that is services made available on-line, for example through the Internet.			
QE1	Does your company have an Internet web site?	Yes	1	QE2
		No	2	
		DK/NA	3	QE4
QE2	What is your Internet website used for? <b>PROBE TO PRECODES IF NECESSARY</b> <b>MULTI ANSWERS ALLOWED</b>	Advertising the company or its goods/ services to the general public	1	
		Advertising the company or its goods/ services to other companies/ professionals	1	
		Sales to the general public	1	
		Sales to other companies	1	
		Customer services (feedback from consumers)	1	
		Advertising vacant positions within your company	1	
		Other (SPECIFY) _____	1	QE3
		DK/NA	1	
QE3	Which markets (countries/ regions) are you targeting via your Internet presence? <b>PROBE TO PRECODES</b> <b>MULTI ANSWERS ALLOWED</b>	Regional	1	
		National	1	
		European Union	1	
		Rest of Europe	1	
		USA/Canada	1	
		Rest of the World	1	
		DK/NA	1	QE4
QE4	Does your company use the websites and on-line services of other companies or institutions?	Yes	1	QE5
		No	2	
		DK/NA	3	QF1



								Code	Route
QF2b	What was the nature of the problems encountered? <b>PROBE TO PRECODES IF NECESSARY</b> <b>MULTI ANSWERS ALLOWED</b>	Could not transport your merchandise from one member state to another						1	QF3
		Merchandise was withheld at borders						1	
		Clients cancelled orders						1	
		Imported goods had to undergo additional certification procedures						1	
		Foreign clients followed customer choice for national products						1	
		Consumers' confidence collapsed						1	
		Other (SPECIFY) _____						1	
		DK/NA						1	
QF3	I would like to know how you, as a manager, would evaluate the dioxin crisis management. I am going to read out a number of statements and, for each one, please let me know whether you agree totally, partly, not really or not at all with it. In the dioxin crisis, would you say that ... <b>READ OUT FIRST STATEMENT - ROTATE ORDER BETWEEN INTERVIEWS.</b>								
			Totally	Partly	Not really	Not at all	DK/NA		
a)	European institutions acted swiftly	()	1	2	3	4	5		
b)	European legislation was clear and to the point	()	1	2	3	4	5		
c)	Co-operation between the European institutions and the national authorities concerned, functioned well	()	1	2	3	4	5		
d)	Co-operation between the national authorities of different countries, e.g. the country of origin and the country of destination, worked well	()	1	2	3	4	5		
e)	Information given to the industry by the national authorities was satisfactory	()	1	2	3	4	5		QF4

	Code	Route
<p>QF4 As a business manager, which of the following actions would be effective, in your opinion, in improving the management of such a crisis, in the future...</p> <p><b>READ OUT PRECODES</b> <b>MULTI-ANSWERS ALLOWED</b></p>	1	
	1	
	1	
	1	*See Insts
	1	
	1	

**INTERVIEWER**

- **RECORD RESPONDENT NAME, THEN THANK AND CLOSE**