

Flash-EB 84 Sep 2000 ZA 3499

FLASH EUROBAROMETRE 84

(SPECIAL TARGETS)

« THE SINGLE MARKET »
and some related topics
=====

2000, September

DESCRIPTION OF THE SURVEY

INTRODUCTION.

This is a European Commission « Flash Eurobarometer Special Targets », managed and organised by the DG Education and Culture, « Public Opinion Analysis » Unit.

It has been conducted by EOS GALLUP EUROPE, on behalf of the DG Internal Market.

The interviews of the Flash Eurobarometers « Special Targets » are realised by telephone, among "Targets" which are defined according to the specific objectives of each individual Survey, and the samples are drawn from nominative lists provided by Dun & Bradstreet.

POPULATION CONCERNED.

In the present case, the targets have been defined by the European Commission as : all the European Union companies employing 20 persons or more, and belonging to one of these industrial sectors : construction, manufacturing industries, business services, and trade (hotels, restaurants and cafes excluded).

QUESTIONNAIRE.

The questionnaire prepared by the DG Internal Market and EOS GALLUP EUROPE has three main chapters, which are devoted to :

(a) The general characteristics of the companies and of their activities within the Single Market

(b) The evaluation of the « Internal Market » of the European Union functioning and performances

(c) The enlargement of the European Union.

SAMPLING PROCEDURE.

Dun & Bradstreet prepared the lists of companies which were qualified to be interviewed, by drawing a sample from their european data-bases. This sampling has been made according to three criteria : Country, size of the company, and industrial sector. Within each cell defined by these criteria, the sampling has been made at random.

The total sample size has been distributed by the D.G. XV of the European Commission and EOS GALLUP EUROPE, according to the three keys of the sampling definition : Country, size of the Company, and sector of activity. However, with the exception of Ireland and Luxemburg, a minimum sample of 100 interviews has been fixed for the countries where a strict representative distribution would have resulted in a sample smaller than that. (During the data processing, the contribution of each country has been re-weighted down or up to its real weight within the European Union).

The person interviewed in each company is the one who has, or who would have, the responsibility of its EU business. It is the interviewer which insures the identity of this person, at the same time that he/she controls the accuracy of the enterprise characteristics, as delivered by Dun & Bradstreet, namely : the number of employed persons and the industrial sector.

INTERVIEWING.

Interviews have been realized during the month of September 2000, in the fifteen Countries of the European Union, by specialized interviewers of our national Institutes, working in their Country exclusively. This total interview decentralization is allowed by the network of EOS GALLUP EUROPE Institutes, namely :

Belgium	:	DIMARSO - BRUXELLES
Denmark	:	GALLUP - KOBENHAVN
Germany	:	EMNID - BIELEFELD
Greece	:	ICAP - ATHENS
Spain	:	DEMOSCOPIA - MADRID
Finland	:	SUOMEN GALLUP - ESPOO
France	:	B.V.A. - VIROFLAY
Ireland	:	IRISH MKTG SURVEYS - DUBLIN
Italy	:	DOXA - MILANO
Luxembourg	:	ILReS - LUXEMBOURG
Netherland	:	NIPO - AMSTERDAM
Austria	:	ÖSTERREICHISCHES GALLUP - VIENNA
Portugal	:	METRIS - LISBOA
Sweden	:	SIFO - STOCKHOLM
United Kingdom	:	NOP - LONDON

The interviews have been realized by telephone, with utilization of a specific software for the contacts and questionnaire management (CATI system).

SAMPLE INTERVIEWED.

The wished structure of the sample has been quite well respected. As we "over-represented" some countries in this sample, in order to get accountable results in each country (Ireland and Luxemburg excepted), it was nevertheless necessary to proceed to the "weighting" of the data before processing them.

Hereafter is presented the exact size of each national sample, before and after this "weighting" :

("MAJORS" refer to Companies employing 250 persons or more)
("SME" refer to Companies employing 20 to 249 persons)

ACTUALLY INTERVIEWED :				WEIGHTED FOR ANALYSIS :			
	TOTAL	MAJORS	SME		TOTAL	MAJORS	SME
TOTAL	3887	524	3363	TOTAL	3887	500	3387
BELGIQUE	144	21	123	BELGIQUE	124	16	109
DANMARK	104	9	95	DANMARK	80	7	72
DEUTSCHLAND	1026	143	883	DEUTSCHLAND	1112	155	957
ELLAS	107	7	100	ELLAS	53	3	50
ESPANA	267	32	235	ESPANA	258	31	227
FINLAND	107	26	81	FINLAND	58	5	53
FRANCE	659	95	564	FRANCE	709	99	610
IRELAND	30	6	24	IRELAND	30	4	26
ITALIA	528	68	460	ITALIA	501	62	439
LUXEMBOURG	8	1	7	LUXEMBOURG	8	1	7
NEDERLAND	128	22	106	NEDERLAND	184	23	160
ÖSTERREICH	114	17	97	ÖSTERREICH	108	13	95
PORTUGAL	106	7	99	PORTUGAL	47	3	44
SWEDEN	114	18	96	SWEDEN	106	13	93
UNITED KINGDOM	445	52	393	UNITED KINGDOM	509	65	444
SECTOR				SECTOR			
Construction	320	34	286	Construction	373	28	345
Manufacturing	1777	256	1521	Manufacturing	1599	227	1373
Distribution	1061	77	984	Distribution	1058	74	984
Transport	287	48	239	Transport	338	56	282
Communications	113	20	93	Communications	167	29	138
Other services	329	89	240	Other services	351	87	264
N.OF EMPLOYEES				N.OF EMPLOYEES			
20 to 49	1679		1679	20 to 49	1668		1668
50 to 249	1684		1684	50 to 249	1719		1719
250 to 499	239	239		250 to 499	226	226	
500 to 999	144	144		500 to 999	137	137	
1000 to 2999	86	86		1000 to 2999	85	85	
3000 and more	55	55		3000 and more	53	53	

CONFIDENTIAL

INFORMATION TO PREPARE BEFORE THE INTERVIEW :

(a) **DUN & BRADSTREET REFERENCE** : (= DUNS-N°, in D&B FILE)

(b) **NUTS REGION** : (CODED ACCORDING TO THE TOWN, FOUND IN D&B FILE)

(c) **SIC or NACE CODE** : (FOUND IN D&B FILE)

(d) **NUMBER OF EMPLOYEES** : (FOUND IN D&B FILE)

A. DESCRIPTIVE ELEMENTS.

1. What is exactly your position in the company : ... ?

[SPECIFY :, THEN RECODE BELOW :]

- General Management : Chairman, Chief Executive Officer, Managing Director,
Director of the Board 1
- Manager with the highest level of responsibility for operations in European
Union countries 2
- Other senior manager responsible for European Union affairs 3
- Import/Export manager 4
- other senior manager, not classifiable 5
- (other cases) **[STOP INTERVIEW]**

- TREND MODIFIED - FLASH 72, QA2. -

2. Does your company operate : ...

[READ OUT – ONLY ONE ANSWER]

- independently of any link with other companies or holdings, 1
- as an independent member of a group of companies, 2
- as an autonomous subsidiary of a parent company, or 3
- as a department of another company ? 4
- (other cases) **[SPECIFY : ...]** 5
- (dk/na) **[STOP INTERVIEW]**

- TREND - FLASH 72, QA6. -

3. Is your company mainly concerned with: ...

[READ OUT – ONLY ONE ANSWER]

- construction or civil engineering 1
- production and manufacturing of goods 2
- trade and distribution (wholesale or retail) 3
- transport (of goods, merchandise or people) 4
- financial services (banking, insurance, broking) 5
- communications 6
- other business services **[SPECIFY... CHECK EXCLUSIONS!]** 7
- (none of those cases) **[SPECIFY... CHECK EXCLUSIONS!!]** 8

- [- Agriculture, mining, extractive industry, → STOP INTERVIEW]**
- [- Hotels/restaurants/cafes → STOP INTERVIEW]**
- [- Personal services → STOP INTERVIEW]**
- [- DK/NA → STOP INTERVIEW]**

4. How many people does your company regularly employ in **[OUR COUNTRY]** ?

- (number of people) **[IF LESS THAN 20 or DK/NA → STOP INTERVIEW]**

- TREND - FLASH 72, QA3. -

5. Do the activities of your company extend outside **[OUR COUNTRY]** and in particular : ...

[READ OUT – SEVERAL POSSIBLE ANSWERS]

- to the European Union 1
 - to Europe but outside the European Union 1
 - to other continents 1

[IF NOT "TO THE EUROPEAN UNION" : → STOP INTERVIEW]

6. In the last two years, what has happened to the total turnover of your company, did it :

[READ OUT – ONLY ONE ANSWER]

- increase substantially 1
 - increase 2
 - remain unchanged 3
 - decrease, or 4
 - decrease substantially? 5
 - (dk/na) 6

- TREND - FLASH 72, QA7. -

7. And what has happened to: ...

[READ OUT – ONE ANSWER FOR EACH ITEM]

(a) your market share in **[OUR COUNTRY]** ? 1 2 3 4 5 6
 (b) your export sales within the European Union ? 1 2 3 4 5 6
 (c) your employment volume ? 1 2 3 4 5 6
 (d) your capital investment ? 1 2 3 4 5 6
 (e) your range of new products/services ? 1 2 3 4 5 6

- increased substantially 1
 - increased 2
 - remained unchanged 3
 - decreased, or 4
 - decreased substantially? 5
 - (dk/na) 6

- TREND - FLASH 72, QA8. -

8.a. To which European Union countries does your company export goods or services, even occasionally?

[PROMPT : "Is this all ?" - READ OUT ONLY IF REQUESTED]

- Belgium	1
- 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	1
- (none).....	1

8.b. And in which countries, is your company established to handle its business locally without any intermediaries ?

[PROMPT : "Is this all ?" - READ OUT ONLY IF REQUESTED]

- Belgium	1
- 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	1
- No establishments in those European Union countries.....	1

[IF NO ESTABLISHMENTS IN THOSE COUNTRIES : SKIP Q.8.c. AND Q.8.d.]
[IF ONLY ONE COUNTRY: ASK Q.8.c. AND SKIP Q.8.d.]
[IF MORE THAN ONE COUNTRY : SKIP Q.8.c. AND ASK Q.8.d.]

8.c. What is your main motive for establishing your business in that country, is it ... :

- because regulations and administrative practices force you to do so ? 1
- for commercial reasons ? 2
- or because of a combination of both? 3
- (none of the above but ...) [SPECIFY : ...] 4
- (dk/na) 5

8.d. In which countries has your company established ...

- because regulations and administrative practices forced you to do so ? 1
- for commercial reasons ? 2
- or because of a combination of both? 3
- (none of the above but ...) [SPECIFY : ...] 4
- (dk/na) 5

[CHECK : ONE ANSWER FOR EACH COUNTRY MENTIONED AT Q.8.b. – REPEAT THEM IF NEEDED]

- (a) Belgium 1 2 3 4 5
- (b) Denmark 1 2 3 4 5
- (c) Germany 1 2 3 4 5
- (d) Greece 1 2 3 4 5
- (e) Spain 1 2 3 4 5
- (f) Finland 1 2 3 4 5
- (g) France 1 2 3 4 5
- (h) Ireland 1 2 3 4 5
- (i) Italy 1 2 3 4 5
- (j) Luxembourg 1 2 3 4 5
- (k) Netherlands 1 2 3 4 5
- (l) Austria 1 2 3 4 5
- (m) Portugal 1 2 3 4 5
- (n) Sweden 1 2 3 4 5
- (o) United Kingdom 1 2 3 4 5

B. YOUR EVALUATION OF THE " INTERNAL MARKET" OF THE EUROPEAN UNION

I would like to ask you a few questions regarding the activities of your company in the other countries of the European Union since the establishment of the Internal European market.

1. When the Internal Market was launched, not all obstacles to the activities of companies within the Internal European Market disappeared at a stroke. Some obstacles could have been hindering your company two years ago, and this might still be the case today.

With respect to your company, would you say that the obstacles that could have hindered you, two years ago:

- have now disappeared altogether, 1
- have been significantly reduced 2
- have slightly decreased 3
- remain unchanged 4
- or on the contrary have tended to increase or multiply ? 5
- (There were no obstacles already two years ago) 6
- (dk/na) 7

[TO ALL, EVEN IF CODE 1 OR 6 TO Q1]

2. Would your company still face the following situations, at least in certain cases or in certain EU countries:

[READ OUT EACH ITEM, EXCEPT "OTHER" WITH ROTATION (a-o) – ONE ANSWER PER ITEM]

- Yes 1
- No 2
- (dk/na) 3

- (a) a ban on selling a product or a service that you are already selling in other countries of the European Union? 1 2 3
- (b) high 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 systems and procedures ? 1 2 3
- (e) costly financing arrangements for cross-border operations ?
- (f) restrictions on market access due to the existence of exclusive distribution networks 1 2 3
- (g) market access requires rights or licenses which are already in the hands of your local competitors? 1 2 3
- (h) State aids favouring your competitors ? 1 2 3
- (i) tax systems discriminating against your activities ? 1 2 3
- (j) discriminatory practices of awarding authorities when you try to enter public procurement markets ? 1 2 3
- (k) lack of legal security for cross-border operations? 1 2 3
- (l) inappropriate legal appeal mechanisms to deal with breaches of contracts outside **[OUR COUNTRY]**? 1 2 3
- (m) lack of protection against piracy and counterfeiting ? 1 2 3
- (n) the requirement to establish a branch in a Member State before services can be provided there? 1 2 3
- (o) difficulties related to the temporary posting of staff members abroad? 1 2 3
- (p) (other legislative or regulatory obstacles) **[SPECIFY : ...]** 1

3. Now let me come to a broader question regarding the Internal Market of the European Union, taking into account all its aspects, both positive and negative, its framework of rules and practices, and the operating conditions it offers to companies like yours.

3.a. From your company's point of view how would you rate the current functioning of the Internal European Market, on a scale from 1 to 10 where:

"1", the minimum rating, means "off-putting and under-performing", and
 "10", the maximum rating, means "open and well-functioning",
 with ratings between 2 and 9 to help moderate your opinion.

- 01 02 03 04 05 06 07 08 09 10
 - (dk/na)99

- TREND MODIFIED - FLASH 72, QB6a. -

3.b. In the knowledge that TODAY you would give a rating of **[SEE 3(a)]** out of 10 for how the Internal European Market functions, what would have been your rating TWO YEARS AGO (again on a scale of one to ten)?

[REPEAT THE MEANING OF THE RATINGS IF REQUESTED]

- 01 02 03 04 05 06 07 08 09 10
 - (dk/na)99

- TREND MODIFIED - FLASH 72, QB6b. -

4. I am now going to ask you to consider separately four characteristics close to the "ideal" definition of a market for products and services. Let us imagine a market...

- where you can sell and buy products and services without hindrances
- where competition is free and fair
- where the legal framework favours commercial activities of companies
- and where the rules are applied in an efficient and impartial way.

For each of those four ideals, I am going to ask you where the Internal European market is currently positioned from your company's point of view using the same scale from 1 to 10 as before: with ratings between 2 and 9 to help moderate your opinion.

4.a. How would you rate the Internal European Market when 10, the maximum rate, means "a market, where you can sell and buy products and services without hindrances" and 1, the minimum rate, means the opposite?

- 01 02 03 04 05 06 07 08 09 10
 - (dk/na)99

4.b. And how would you rate the Internal European Market when 10 means "a market where competition is free and fair"?

- 01 02 03 04 05 06 07 08 09 10
 - (dk/na)99

4.c. And how would you rate the Internal European Market when 10 means " a market where the legal framework favours the commercial activities of companies?

- 01 02 03 04 05 06 07 08 09 10
 - (dk/na)99

4.d. And finally how would you rate the Internal European Market when 10 means "a market where the rules are applied in an efficient and impartial way" ?

- 01 02 03 04 05 06 07 08 09 10
 - (dk/na)99

5. I am now going to propose some objectives that the European Commission and Member States' governments could pursue in their actions. I am asking you to point out the ones that would be important from the point of view of your company.

In your opinion in order to improve the Internal European Market, it is important to ...?

[READ OUT EACH ITEM EXCEPT "OTHERS" WITH ROTATION (a – q) - SEVERAL POSSIBLE ANSWERS]

- (a) develop the efficiency of European financial markets1
- (b) stimulate the mobility of workers.....1
- (c) stimulate and monitor competition between all companies1
- (d) modernise distribution networks and marketing methods1
- (e) develop creativity and industrial and commercial innovation1
- (f) reinforce intellectual property rights.....1
- (g) improve transport and cross-border logistics.....1
- (h) improve electronic communication networks.....1
- (i) standardise regulations in all Member States.....1
- (j) reinforce market surveillance.....1
- (k) ensure openness and transparency of public procurement markets.....1
- (l) simplify administrative procedures imposed on companies1
- (m) develop European standards for products and services1
- (n) remove technical barriers to the free circulation of products.....1
- (o) remove national obstacles to the free provision of services.....1
- (p) remove fiscal barriers to trade1
- (q) develop cooperation and trade with the rest of the world.....1
- (r) (Other) **[SPECIFY : ...]**1

6.a. From your company's point of view, has the establishment of the Internal Market been for your company until now:

- very favourable 1
- favourable 2
- neither favourable nor unfavourable 3
- unfavourable, or 4
- very unfavourable ? 5
- (dk/na) 6

6.b. In the future, do you think that the consolidation of the Internal Market of the 15 EU Member States will be for your company:

- very favourable 1
- favourable 2
- neither favourable nor unfavourable 3
- unfavourable, or 4
- very unfavourable ? 5
- (dk/na) 6

7. Turning to another area, do you think that the increased use of electronic commerce will influence your trade activities in the other Member States in a...

- very positive way 1
- positive way 2
- negative way 3
- very negative way 4
- or will have no influence at all 5
- (dk/na) 6

C. ENLARGEMENT OF THE EUROPEAN UNION

To conclude I would like to talk about the enlargement of the Internal European Market to the countries that are candidates for joining the European Union.

[READ OUT THE COUNTRIES IF REQUESTED]

1. Amongst the candidate countries, which are those with which your company has commercial relations, even on an occasional basis, and which have already attracted your attention for starting business or expanding your activities in the future?

- commercial relations, even on occasional basis 1
- already attracted your attention for the future..... 2

[PROMPT : "Is this all?" - READ OUT IF REQUESTED – ONLY ONE ANSWER PER COUNTRY]

- (a) Bulgaria 1 2
- (b) Cyprus..... 1 2
- (c) Czech Republic..... 1 2
- (d) Estonia..... 1 2
- (e) Hungary 1 2
- (f) Latvia 1 2
- (g) Lithuania 1 2
- (h) Malta 1 2
- (i) Poland 1 2
- (j) Romania..... 1 2
- (k) Slovakia 1 2
- (l) Slovenia 1 2
- (m) Turkey 1 2
- (n) (None of these countries) 0
- (o) (dk/na)..... 9

[IF NO CODE 1 OR 2 : SKIP Q.2]

[THIS QUESTION ONLY CONCERNS THE COUNTRIES MENTIONED IN Q.1. ABOVE:]

2. One of the conditions for those countries to join the European Union is the compatibility of rules and of the functioning of their markets with our Internal European Market.

In view of enlargement, would you say that compared to two years ago, the rules and functioning of those markets ...

- have improved, 1
- have changed slightly, or 2
- have deteriorated in : ... **[READ OUT EACH COUNTRY MENTIONED IN Q.1]** 3
- (dk/na)..... 4

- (a) Bulgaria 1 2 3 4
- (b) Cyprus..... 1 2 3 4
- (c) Czech Republic..... 1 2 3 4
- (d) Estonia..... 1 2 3 4
- (e) Hungary 1 2 3 4
- (f) Latvia 1 2 3 4
- (g) Lithuania 1 2 3 4
- (h) Malta 1 2 3 4
- (i) Poland 1 2 3 4
- (j) Romania..... 1 2 3 4
- (k) Slovakia 1 2 3 4
- (l) Slovenia 1 2 3 4
- (m) Turkey 1 2 3 4

3. Before those countries can join the European Union, which would be for you amongst the following, the main obstacles to be overcome:

[READ OUT EACH ITEM EXCEPT "OTHERS" WITH ROTATION (a – n) - SEVERAL POSSIBLE ANSWERS]

- (a) interventionism in their markets, for example, price controls and obstacles to the start up of economic activities..... 1
- (b) the attitude of the authorities towards foreign companies and their discriminatory practices 1
- (c) administrative and judicial capacities which are inadequate to meet the needs of companies..... 1
- (d) the bureaucracy they impose on cross-border activities 1
- (e) their incomplete legislative framework compared to that of the Internal European Market..... 1
- (f) the absence of application of legislation..... 1
- (g) insufficient restructuring and privatisation of State companies 1
- (h) restrictions on foreign investments 1
- (i) the infrastructure for communications, energy and transport..... 1
- (j) differences in standards and certification procedures compared to those applied within the European Union..... 1
- (k) tariff barriers to trade 1
- (l) the lack of available information on their markets 1
- (m) the development, the functioning and reliability of financial markets 1
- (n) restrictions on movements of capital 1
- (o) (other) **[SPECIFY : ...]** 1

4. If the European Union would enlarge to include those candidate countries that are in a position to join, do you think the enlarged Internal Market would be for your company:

- very favourable 1
- favourable 2
- neither favourable nor unfavourable 3
- unfavourable, or 4
- very unfavourable ? 5
- (dk/na) 6

[THANK RESPONDENT]

[END INTERVIEW]

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