

Flash Eurobarometer 369
January-February 2013

Investing in Intangibles:
Economic Assets and Innovation Drivers for Growth

Basic bilingual questionnaire

TNS Political & Social

| | | | |
|------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| A | Flash number (121-124) [][][][] | A | Numéro du Flash (121-124) [][][][] |
| | FL359A | | FL359A |
| B | Country (125-126) [][] | B | Pays (125-126) [][] |
| | FL359B | | FL359B |
| C | Interview number (127-132) [][][][][][] | C | Numéro de l'interview (127-132) [][][][][][] |
| | FL359C | | FL359C |
| NACE | NACE code (Sample information) [][][][] NACE code - 4 digits | NACE | NACE code (Information échantillon) [][][][] NACE code - 4 digits |
| | FL359NACE | | FL359NACE |
| SIZE | Size of company (Sample information) [][][][] Size of company | SIZE | Taille de l'entreprise (Information échantillon) [][][][] Taille de l'entreprise |
| | FL359SIZE | | FL359SIZE |
| | (INTRO1) Hello, I'm (NAME), calling from (NAME OF NATIONAL INSTITUTE). May I speak with (NAME OF THE RESPONDENT OR TITLE/ROLE DESCRIPTION IF NO NAME) | | (INTRO1) Bonjour, je suis (NOM), je parle au nom de (NOM DE L'INSTITUT NATIONAL). Puis-je parler à (NOM DU REpondant ou titre/description de la fonction si |
| | (INTRO2) IF THE GATEKEEPER ASKS FOR ADDITIONAL INFORMATION: We are contacting (decision makers in) companies across Europe regarding their views on current business topics. The feedback will be used to support decision-making and design future European policies. I would greatly appreciate being able to speak with him or her to include his/her opinion in the study. | | (INTRO2) SI LE STANDARDISTE DEMANDE DES INFORMATIONS COMPLEMENTAIRES : Nous contactons les entreprises en Europe pour mieux connaître leurs opinions sur des sujets liés aux affaires. Les résultats seront utilisés pour soutenir la prise de décision et la conception de futures politiques européennes. Je serais très heureux de pouvoir lui parler et prendre en compte son opinion dans l'étude. |

IF THE ELIGIBLE REpondent IS NOT AVAILABLE, PLEASE MAKE AN APPOINTMENT

(INTRO3) (WHEN SPEAKING TO THE TARGETED RESPONDENTS) Hello, I'm (NAME), calling from (NAME OF NATIONAL INSTITUTE), a market research company.

(INTRO4) We are contacting (decision makers in) companies across Europe regarding their views on current business topics and we would greatly appreciate your input. The feedback will be used to support decision-making and design future European policies. Would you have some time to answer to a few questions? It should not take more than 15 minutes...

FL359 INTRO1/2/3/4

ASK LAN1 ONLY IN BE, EE, FI, IE, LV, LU, MK, MT, CH, TR

LAN1 In which language do you want to do this interview?

(READ OUT - ONE ANSWER ONLY)

| | (142-143) |
|----------------------------|-----------|
| Austria - German | 1 |
| Belgium - Dutch | 2 |
| Belgium - French | 3 |
| Bulgaria - Bulgarian | 4 |
| Croatia - Croatian | 5 |
| Czech Republic - Czech | 6 |
| Denmark - Danish | 7 |
| Estonia - Estonian | 8 |
| Estonia - Russian | 9 |
| Finland - Finnish | 10 |
| Finland - Swedish | 11 |
| France - French | 12 |
| Germany - German | 13 |
| Greece - Greek | 14 |
| Hungary - Hungarian | 15 |
| Iceland - Icelandic | 16 |
| Ireland - English | 17 |
| Ireland - Irish | 18 |
| Italy - Italian | 19 |
| Latvia - Latvian | 20 |
| Latvia - Russian | 21 |
| Lithuania - Lithuanian | 22 |
| Luxembourg - Luxembourgish | 23 |
| Luxembourg - French | 24 |
| Luxembourg - German | 25 |
| Macedonia - Macedonian | 26 |
| Macedonia - Albanian | 27 |
| Malta - Maltese | 28 |
| Malta - English | 29 |
| Japan - Japanese (N) | 30 |
| Netherlands - Dutch | 31 |

SI LE REpondant ELIGIBLE N'EST PAS DISPONIBLE, PRENDRE UN RENDEZ-VOUS

(INTRO3) (AU MOMENT DE PARLER AU REpondant SELECTIONNE) Bonjour, je suis (NOM), je parle au nom de (NOM DE L'INSTITUT NATIONAL), un institut de sondages.

(INTRO4) Nous contactons les entreprises en Europe pour mieux connaître leurs opinions sur des sujets liés aux affaires et nous aimerions beaucoup avoir votre avis. Les résultats seront utilisés pour soutenir la prise de décision et la conception de futures politiques européennes. Auriez-vous un peu de temps pour répondre à quelques questions? Cela ne devrait pas prendre plus de 15 minutes...

FL359 INTRO1/2/3/4

POSER LAN1 SEULEMENT EN BE, EE, FI, IE, LV, LU, MK, MT, CH, TR

LAN1 En quelle langue voulez-vous faire l'interview?

(LIRE - UNE SEULE REponse)

| | (142-143) |
|------------------------------|-----------|
| Autriche - Allemand | 1 |
| Belgique - Néerlandais | 2 |
| Belgique - Français | 3 |
| Bulgarie - Bulgare | 4 |
| Croatie - Croate | 5 |
| Republique Tchèque - Tchèque | 6 |
| Danemark - Danois | 7 |
| Estonie - Estonien | 8 |
| Estonie - Russe | 9 |
| Finlande - Finnois | 10 |
| Finlande - Suédois | 11 |
| France - Français | 12 |
| Allemagne - Allemand | 13 |
| Grèce - Grec | 14 |
| Hongrie - Hongrois | 15 |
| Islande - Islandais | 16 |
| Irlande - Anglais | 17 |
| Irlande - Irlandais | 18 |
| Italie - Italien | 19 |
| Lettonie - Letton | 20 |
| Lettonie - Russe | 21 |
| Lituanie - Lituanien | 22 |
| Luxembourg - Luxembourgeois | 23 |
| Luxembourg - Français | 24 |
| Luxembourg - Allemand | 25 |
| Macédoine - Macédonien | 26 |
| Macédoine - Albanais | 27 |
| Malte - Maltais | 28 |
| Malte - Anglais | 29 |
| Japon - Japonais (N) | 30 |
| Pays-Bas - Néerlandais | 31 |

| | |
|----------------------------|----|
| Norway - Norwegian | 32 |
| Poland - Polish | 33 |
| Portugal - Portuguese | 34 |
| Republic of Cyprus - Greek | 35 |
| Romania - Romanian | 36 |
| Slovakia - Slovak | 37 |
| Slovenia - Slovene | 38 |
| | 39 |
| Spain - Spanish | 40 |
| Sweden - Swedish | 41 |
| Switzerland - German | 42 |
| Switzerland - French | 43 |
| Switzerland - Italian | 44 |
| Turkey - Turkish | 45 |
| Turkey - Kurkish | 46 |
| USA - English (N) | 47 |
| United Kingdom - English | 48 |
| | 49 |

FL359 LAN1 (M)

| | |
|-----------------------------|----|
| Norvège - Norvégien | 32 |
| Pologne - Polonais | 33 |
| Portugal - Portugais | 34 |
| Republique de Chypre - Grec | 35 |
| Roumanie - Roumain | 36 |
| Slovaquie - Slovaque | 37 |
| Slovénie - Slovène | 38 |
| | 39 |
| Espagne - Espagnol | 40 |
| Suède - Suédois | 41 |
| Suisse - Allemand | 42 |
| Suisse - Français | 43 |
| Suisse - Italien | 44 |
| Turquie - Turc | 45 |
| Turquie - Kurde | 46 |
| USA - Anglais (N) | 47 |
| Royaume-Uni - Anglais | 48 |
| | 49 |

FL359 LAN1 (M)

(RESPONDENT REASSURANCE) I would like to reassure you that your co-operation is completely voluntary and all of your answers are confidential. For quality control and training purposes this interview may be monitored or recorded. First I will ask a few questions purely for classification purposes...

ASK ALL

Let me start with a few basic questions about your company. For all questions, please limit your responses to your company's activities in [YOUR COUNTRY] only.

D1 Is your company part of a group?

| | |
|-------|---|
| Yes | 1 |
| No | 2 |
| DK/NA | 3 |

NEW

D2 In which country is the head office of your company located?

ONE ANSWER ONLY

| | |
|--------------------|----|
| Austria | 1 |
| Belgium | 2 |
| Bulgaria | 3 |
| Croatia | 4 |
| Republic of Cyprus | 5 |
| Czech Republic | 6 |
| Denmark | 7 |
| Estonia | 8 |
| Finland | 9 |
| France | 10 |
| Germany | 11 |
| Greece | 12 |
| Hungary | 13 |
| Iceland | 14 |
| Ireland | 15 |
| Italy | 16 |
| Japan | 17 |
| Latvia | 18 |
| Lithuania | 19 |
| Luxembourg | 20 |
| FYROM | 21 |
| Malta | 22 |
| Netherlands | 23 |

(RASSURER LE REpondant) Je voudrais vous assurer que votre coopération est totalement volontaire. Toutes vos réponses resteront confidentielles. Pour satisfaire à nos contrôles de qualité ou servir d'exemple pour des formations internes, cette interview peut être écoutée ou enregistrée. Passons à quelques questions concernant votre entreprise...

A TOUS

Je vais commencer par vous poser quelques questions générales sur votre entreprise. Pour toutes les questions, veuillez limiter vos réponses aux seules activités de l'entreprise en [NOTRE PAYS].

D1 Votre entreprise fait-elle partie d'un groupe?

| | |
|--------|---|
| Oui | 1 |
| Non | 2 |
| NSP/SR | 3 |

NEW

D2 Dans quel pays le siège social de votre entreprise se trouve-t-il ?

UNE SEULE REPONSE

| | |
|----------------------|----|
| Autriche | 1 |
| Belgique | 2 |
| Bulgarie | 3 |
| Croatie | 4 |
| République de Chypre | 5 |
| République tchèque | 6 |
| Danemark | 7 |
| Estonie | 8 |
| Finlande | 9 |
| France | 10 |
| Allemagne | 11 |
| Grèce | 12 |
| Hongrie | 13 |
| Islande | 14 |
| Irlande | 15 |
| Italie | 16 |
| Japon | 17 |
| Lettonie | 18 |
| Lituanie | 19 |
| Luxembourg | 20 |
| FYROM | 21 |
| Malte | 22 |
| Pays-Bas | 23 |

| | |
|--------------------|----|
| Norway | 24 |
| Poland | 25 |
| Portugal | 26 |
| Romania | 27 |
| Republic of Serbia | 28 |
| Slovakia | 29 |
| Slovenia | 30 |
| Spain | 31 |
| Sweden | 32 |
| Switzerland | 33 |
| Turkey | 34 |
| United Kingdom | 35 |
| USA | 36 |
| Other | 37 |
| DK/NA | 38 |

| |
|-----|
| NEW |
|-----|

| | |
|----------------------|----|
| Norvège | 24 |
| Pologne | 25 |
| Portugal | 26 |
| Roumanie | 27 |
| République de Serbie | 28 |
| Slovaquie | 29 |
| Slovénie | 30 |
| Espagne | 31 |
| Suède | 32 |
| Suisse | 33 |
| Turquie | 34 |
| Royaume-Uni | 35 |
| USA | 36 |
| Autre | 37 |
| NSP/SR | 38 |

| |
|-----|
| NEW |
|-----|

If your company is part of a group, please answer the remaining questions only for your company in (OUR COUNTRY). Do not include results for subsidiaries or parent companies outside of (OUR COUNTRY).

Si votre entreprise fait partie d'un groupe, veuillez répondre aux questions pour votre entreprise en [NOTRE PAYS] seulement. N'incluez pas les résultats des filiales ou de la maison mère en dehors de [NOTRE PAYS].

D3 How many employees (full-time equivalent) does your company currently have?

D3 Combien de salariés (équivalent temps-plein) compte actuellement votre entreprise ?

(READ OUT – ONE ANSWER ONLY)

(LIRE – UNE SEULE REPONSE)

| | |
|-------------|---|
| 1 – 9 | 1 |
| 10 - 49 | 2 |
| 50 - 249 | 3 |
| 250 or more | 4 |
| DK/NA | 5 |

| | |
|----------------------|---|
| 1 à 9 | 1 |
| 10 à 49 | 2 |
| 50 à 249 | 3 |
| 250 salariés ou plus | 4 |
| NSP/SR | 5 |

FL343 D1B

FL343 D1B

IF D3=5 THEN STOP INTERVIEW

SI D3=5 ALORS STOP INTERVIEW

D4 When was your company established?

D4 Quand votre entreprise a-t-elle été créée ?

(READ OUT – ONE ANSWER ONLY)

(LIRE – UNE SEULE REPONSE POSSIBLE)

| | |
|-----------------------------------------------|---|
| Before 1 January 2007 (M) | 1 |
| Between 1 January 2007 and 1 January 2012 (M) | 2 |
| After 1 January 2012 (M) | 3 |
| DK/NA | 4 |

| | |
|------------------------------------------------------|---|
| Avant le 1er janvier 2007 (M) | 1 |
| Entre le 1er janvier 2007 et le 1er janvier 2012 (M) | 2 |
| Après le 1er janvier 2012 (M) | 3 |
| NSP/SR | 4 |

FL343 D2 MODIFIED TREND

FL343 D2 MODIFIED TREND

D5A What was the turnover of your company in 2011?

D5A Quel était le chiffre d'affaire de votre entreprise en 2011?

(WRITE DOWN THE ANSWER)
(IF REFUSAL/DK/NA CODE "9")

(NOTER LA REPONSE)
(SI REFUS/NSP/SR CODE "9")

euros

euros

NEW

NEW

DO NOT READ OUT D5B BUT RECODE INFORMATION IN D5A

NE PAS LIRE D5B MAIS RECODER L'INFORMATION DE D5A

D5B What was the turnover of your company in 2011?

D5B Quel était le chiffre d'affaire de votre entreprise en 2011?

DO NOT READ OUT

NE PAS LIRE

| | |
|-------------------------------------|---|
| Less than 100 000 euros | 1 |
| From 100 000 to 500 000 euros | 2 |
| More than 500 000 to 2 million euro | 3 |
| More than 2 to 10 million euro | 4 |
| More than 10 to 50 million euro | 5 |
| More than 50 million euro | 6 |
| DK/NA | 7 |

| | |
|--------------------------------------|---|
| Moins de 100 000 euros | 1 |
| De 100 000 à 500 000 euros | 2 |
| Plus de 500 000 à 2 millions d'euros | 3 |
| Plus de 2 à 10 millions d'euros | 4 |
| Plus de 10 à 50 millions d'euros | 5 |
| Plus de 50 millions d'euros | 6 |
| NSP/SR | 7 |

NEW

NEW

IF D5B=7 'DK/NA' THEN STOP INTERVIEW

SI D5B=7 'NSP/SR' ALORS STOP INTERVIEW

D6 Compared to 2010, did your company's turnover in 2011...? (M)

D6 Par rapport à 2010, en 2011, le chiffre d'affaires de votre entreprise...? (M)

(READ OUT – ONE ANSWER ONLY)

(LIRE – UNE SEULE REPONSE)

| | |
|-------------------------------|---|
| Rise by more than 25% (M) | 1 |
| Rise by 5 – 25% (M) | 2 |
| Remain approximately the same | 3 |
| Fall by 5 – 25% (M) | 4 |
| Fall by over 25% (M) | 5 |
| DK/NA | 6 |

| | |
|----------------------------------|---|
| A augmenté de plus de 25% (M) | 1 |
| A augmenté de 5 à 25% (M) | 2 |
| Est resté à peu près le même (M) | 3 |
| A diminué de 5 à 25% (M) | 4 |
| A diminué de plus de 25% (M) | 5 |
| NSP/SR | 6 |

FL343 D5 MODIFIED TREND

FL343 D5 MODIFIED TREND

D7 "NEITHER OF THESE" CODE 3 - SINGLE CODE

D7 "RIEN DE CELA" CODE 3 - CODE UNIQUE

D7 Has your company been taken over, merged with another company or sold off any part of the business since 1 January 2011?

D7 Votre entreprise a-t-elle été rachetée ou fusionnée avec une autre entreprise ou a-t-elle vendu certaines parties de ces activités depuis le 1er janvier 2011?

(READ OUT – MULTIPLE ANSWERS POSSIBLE)

(LIRE – PLUSIEURS REPONSES POSSIBLES)

| | |
|--------------------------------------------------------------------|----|
| The company has been taken over or has merged with another company | 1, |
| The company has sold off a part of the business | 2, |
| Neither of these | 3, |
| DK/NA | 4, |

| | |
|--------------------------------------------------------------------|----|
| L'entreprise a été rachetée ou fusionnée avec une autre entreprise | 1, |
| L'entreprise a vendu certaines parties de ses activités | 2, |
| Rien de cela | 3, |
| NSP/SR | 4, |

NEW BASED ON FL343 D3

NEW BASED ON FL343 D3

THE PERCENTAGES IN D8.1, D8.2, D8.3 AND D8.4 HAVE TO SUM UP TO ONE HUNDRED (D8.1+D8.2+D8.3+D8.4 = 100%)
IF ONE ANSWER 999 IN D8.1, D8.2, D8.3 OR D8.4 THEN THE SUM OF THE VALID ANSWERS (ANSWERS BETWEEN 0 AND 100%) CAN BE LOWER THAN 100%

LA SOMME DES POURCENTAGES EN D8.1, D8.2, D8.3 ET D8.4 DOIT ETRE EGALE A 100% (D8.1+D8.2+D8.3+D8.4 = 100%)
SI UN CODE 999 EN D8.1, D8.2, D.3 OU D8.4 ALORS LA SOMME DES REPONSES VALIDES (REPONSES ENTRE 0 ET 100%) PEUT ETRE INFERIEURE A 100%

D8.1 Approximately what percentage of your company's turnover in 2011 came from sales in each of the following markets? (M)

D8.1 Approximativement quel pourcentage du chiffre d'affaire en 2011 de votre entreprise a été réalisé sur chacun des marchés suivants ? (M)

(READ OUT - WRITE DOWN THE ANSWER IN PERCENTAGE)
(IF "DK/NA" CODE '999')

(NOTER EN CLAIR LA REPONSE EN POURCENTAGE)
(SI "NSP/SR" CODER '999')

Locally, in the area or region where your company is located (N)

Localement, dans la zone ou la région où votre entreprise est située (N)

FL343 D4.1 MODIFIED TREND

FL343 D4.1 MODIFIED TREND

D8.2 Approximately what percentage of your company's turnover in 2011 came from sales in each of the following markets? (M)

D8.2 Approximativement quel pourcentage du chiffre d'affaire en 2011 de votre entreprise a été réalisé sur chacun des marchés suivants ? (M)

(READ OUT - WRITE DOWN THE ANSWER IN PERCENTAGE)
(IF "DK/NA" CODE '999')

(NOTER EN CLAIR LA REPONSE EN POURCENTAGE)
(SI "NSP/SR" CODER '999')

In your own country outside the area or region where your company is located (N)

Dans votre pays en dehors de la zone ou la région où votre entreprise est située (N)

FL343 D4.1 MODIFIED TREND

FL343 D4.1 MODIFIED TREND

D8.3 Approximately what percentage of your company's turnover in 2011 came from sales in each of the following markets? (M)

D8.3 Approximativement quel pourcentage du chiffre d'affaire en 2011 de votre entreprise a été réalisé sur chacun des marchés suivants ? (M)

(READ OUT - WRITE DOWN THE ANSWER IN PERCENTAGE)
(IF "DK/NA" CODE '999')

(NOTER EN CLAIR LA REPONSE EN POURCENTAGE)
(SI "NSP/SR" CODER '999')

In other EU countries, or in Switzerland, Norway, Iceland, Liechtenstein (M)

Dans d'autres pays de l'UE, ou en Suisse, en Norvège, en Islande, au Lichtenstein (M)

FL343 D4.2 MODIFIED TREND

FL343 D4.2 MODIFIED TREND

D8.4 Approximately what percentage of your company's turnover in 2011 came from sales in each of the following markets? (M)

(READ OUT - WRITE DOWN THE ANSWER IN PERCENTAGE)
(IF "DK/NA" CODE '999')

In other countries outside the EU (M)

FL343 D4.3 MODIFIED TREND

Q1 : ROTATE ITEMS 1 TO 5

Q1 Thinking about the priorities for your company, please tell me which two of the following are the most important?

(READ OUT – MAX. 2 ANSWERS POSSIBLE)

- | | |
|-----------------------------------------------|----|
| Rapid development of new products or services | 1, |
| Tailored, customised solutions | 2, |
| Ensuring lower prices | 3, |
| Increasing labour productivity | 4, |
| Decreasing the production costs | 5, |
| Other (DO NOT READ OUT) | 6, |
| DK/NA | 7, |

NEW

D8.4 Approximativement quel pourcentage du chiffre d'affaire en 2011 de votre entreprise a été réalisé sur chacun des marchés suivants ? (M)

(NOTER EN CLAIR LA REPONSE EN POURCENTAGE)
(SI "NSP/SR" CODER '999')

Dans d'autres pays en dehors de l'UE (M)

FL343 D4.3 MODIFIED TREND

Q1 : ROTATION DES ITEMS 1 A 5

Q1 Parmi les suivantes, quelles sont les deux priorités les plus importantes pour votre entreprise ?

(LIRE – MAX. 2 REPONSES)

- | | |
|----------------------------------------------------------|----|
| Le développement rapide de nouveaux produits ou services | 1, |
| Des solutions sur mesure et personnalisées | 2, |
| Assurer des prix plus bas | 3, |
| Augmenter la productivité de la main d'œuvre | 4, |
| Diminuer les coûts de production | 5, |
| Autre (NE PAS LIRE) | 6, |
| NSP/SR | 7, |

NEW

Q2 : ROTATE STATEMENTS 1 TO 6

Q2 In 2011, what percentage of its total turnover did your company invest in the following activities using internal resources (i.e. relying solely on internal resources and capacities)?

(READ OUT - ONE ANSWER ONLY)

| | | 0% | Less than 1% | 1 - 5 % | More than 5 to 15% | More than 15 to 25% | More than 25 to 50% | More than 50% | DK/NA |
|--|--|----|--------------|---------|--------------------|---------------------|---------------------|---------------|-------|
|--|--|----|--------------|---------|--------------------|---------------------|---------------------|---------------|-------|

| | | | | | | | | | |
|---|-------------------------------------------------------------------------------|---|---|---|---|---|---|---|---|
| 1 | Training | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| 2 | Software development, excluding research and development (R&D) and web design | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| 3 | Company reputation and branding | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| 4 | Research and development (R&D) | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| 5 | Design of products and services (excluding research and development (R&D)) | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| 6 | Organization or business process improvements | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |

NEW

Q2 : ROTATION DES PROPOSITIONS 1 A 6

Q2 Quel pourcentage de son chiffre d'affaires en 2011 votre entreprise a-t-elle investi dans les activités suivantes en utilisant des ressources internes (c'est-à-dire en s'appuyant uniquement sur des ressources et des capacités internes ?

(LIRE - UNE SEULE REPONSE)

| | | 0% | Moins de 1% | 1 à 5 % | Plus de 5 à 15% | Plus de 15 à 25% | Plus de 25 à 50% | Plus de 50% | NSP /SR |
|--|--|----|-------------|---------|-----------------|------------------|------------------|-------------|---------|
|--|--|----|-------------|---------|-----------------|------------------|------------------|-------------|---------|

| | | | | | | | | | |
|---|----------------------------------------------------------------------------------------|---|---|---|---|---|---|---|---|
| 1 | La formation | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| 2 | Le développement de logiciels en excluant la Recherche & Développement et le webdesign | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| 3 | La réputation de l'entreprise et la marque | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| 4 | La Recherche et Développement (R&D) | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| 5 | Le design de produits ou services (en excluant la Recherche & Développement (R&D)) | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| 6 | L'amélioration de l'organisation ou des processus internes | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |

NEW

Q3 : ROTATE STATEMENTS 1 TO 6

Q3 In 2011, what percentage of its total turnover did your company invest in the following activities using an external provider for which the company paid (i.e. relying solely on external resources and capacities)?

(READ OUT - ONE ANSWER ONLY)

| | | 0% | Less than 1% | 1 - 5 % | More than 5 to 15% | More than 15 to 25% | More than 25 to 50% | More than 50% | DK/NA |
|--|--|----|--------------|---------|--------------------|---------------------|---------------------|---------------|-------|
|--|--|----|--------------|---------|--------------------|---------------------|---------------------|---------------|-------|

| | | | | | | | | | |
|---|-------------------------------------------------------------------------------|---|---|---|---|---|---|---|---|
| 1 | Training | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| 2 | Software development, excluding research and development (R&D) and web design | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| 3 | Company reputation and branding | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| 4 | Research and development (R&D) | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| 5 | Design of products and services (excluding research and development (R&D)) | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| 6 | Organization or business process improvements | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |

NEW

ASK Q4.1 IF CODES 2 TO 7 IN Q2.1 OR Q3.1

ASK Q4.2 IF CODES 2 TO 7 IN Q2.2 OR Q3.2

ASK Q4.3 IF CODES 2 TO 7 IN Q2.3 OR Q3.3

ASK Q4.4 IF CODES 2 TO 7 IN Q2.4 OR Q3.4

ASK Q4.5 IF CODES 2 TO 7 IN Q2.5 OR Q3.5

ASK Q4.6 IF CODES 2 TO 7 IN Q2.6 OR Q3.6

GO TO Q9 IF ALL CODES ARE 1 "0%" OR ALL CODES ARE 8 "DK/NA" IN ALL Q2.1 TO Q2.6 AND Q3.1 TO Q3.6

Q4 : ROTATE STATEMENTS 1 TO 6

Q3 : ROTATION DES PROPOSITIONS 1 A 6

Q3 Quel pourcentage de son chiffre d'affaires en 2011 votre entreprise a-t-elle investi dans les activités suivantes en utilisant des fournisseurs externes payés par l'entreprise (c'est-à-dire en s'appuyant uniquement sur des ressources et des capacités externes ?

(LIRE - UNE SEULE REPONSE)

| | | 0% | Moins de 1% | 1 à 5 % | Plus de 5 à 15% | Plus de 15 à 25% | Plus de 25 à 50% | Plus de 50% | NSP /SR |
|--|--|----|-------------|---------|-----------------|------------------|------------------|-------------|---------|
|--|--|----|-------------|---------|-----------------|------------------|------------------|-------------|---------|

| | | | | | | | | | |
|---|----------------------------------------------------------------------------------------|---|---|---|---|---|---|---|---|
| 1 | La formation | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| 2 | Le développement de logiciels en excluant la Recherche & Développement et le webdesign | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| 3 | La réputation de l'entreprise et la marque | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| 4 | La Recherche et Développement (R&D) | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| 5 | Le design de produits ou services (en excluant la Recherche & Développement (R&D)) | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| 6 | L'amélioration de l'organisation ou des processus internes | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |

NEW

POSER Q4.1 SI CODES 2 A 7 EN Q2.1 OU Q3.1

POSER Q4.2 SI CODES 2 A 7 EN Q2.2 OU Q3.2

POSER Q4.3 SI CODES 2 A 7 EN Q2.3 OU Q3.3

POSER Q4.4 SI CODES 2 A 7 EN Q2.4 OU Q3.4

POSER Q4.5 SI CODES 2 A 7 EN Q2.5 OU Q3.5

POSER Q4.6 SI CODES 2 A 7 EN Q2.6 OU Q3.6

ALLER EN Q9 SI TOUS LES CODES SONT 1 "0%" OU TOUS LES CODES SONT 8 "NSP/SR" DE LA Q2.1 A LA Q2.6 ET Q3.1 A Q3.6

Q4 : ROTATION DES PROPOSITIONS 1 A 6

Q4 On average, for how long does your company expect to benefit from its investments in the following activities?

(READ OUT - ONE ANSWER ONLY)

| | | Less than 2 years | 2-5 years | 6-10 years | More than 10 years | DK/NA |
|--|--|-------------------|-----------|------------|--------------------|-------|
|--|--|-------------------|-----------|------------|--------------------|-------|

| | | | | | | |
|---|-------------------------------------------------------------------------------|---|---|---|---|---|
| 1 | Training | 1 | 2 | 3 | 4 | 5 |
| 2 | Software development, excluding research and development (R&D) and web design | 1 | 2 | 3 | 4 | 5 |
| 3 | Company reputation and branding | 1 | 2 | 3 | 4 | 5 |
| 4 | Research and development (R&D) | 1 | 2 | 3 | 4 | 5 |
| 5 | Design of products and services (excluding research and development (R&D)) | 1 | 2 | 3 | 4 | 5 |
| 6 | Organization or business process improvements | 1 | 2 | 3 | 4 | 5 |

NEW

Intangible assets are non-financial, non-physical assets. They are created over time and through investment, and are identifiable as separate assets. They may add value to the company. Examples of intangible assets include training, software development, reputation and branding, research and development, the design of products and services or business process improvements.

Q4 En moyenne, pendant combien de temps votre entreprise estime-t-elle bénéficier de ses investissements dans les activités suivantes ?

(LIRE - UNE SEULE REPONSE)

| | | Moins de 2 ans | 2 à 5 ans | 6 à 10 ans | Plus de 10 ans | NSP/SR |
|--|--|----------------|-----------|------------|----------------|--------|
|--|--|----------------|-----------|------------|----------------|--------|

| | | | | | | |
|---|----------------------------------------------------------------------------------------|---|---|---|---|---|
| 1 | La formation | 1 | 2 | 3 | 4 | 5 |
| 2 | Le développement de logiciels en excluant la Recherche & Développement et le webdesign | 1 | 2 | 3 | 4 | 5 |
| 3 | La réputation de l'entreprise et la marque | 1 | 2 | 3 | 4 | 5 |
| 4 | La Recherche et Développement (R&D) | 1 | 2 | 3 | 4 | 5 |
| 5 | Le design de produits ou services (en excluant la Recherche & Développement (R&D)) | 1 | 2 | 3 | 4 | 5 |
| 6 | L'amélioration de l'organisation ou des processus internes | 1 | 2 | 3 | 4 | 5 |

NEW

Les actifs incorporels sont des actifs non financiers et non matériels. Ils se créent avec le temps et les investissements et sont identifiables comme des actifs à part. Ils peuvent ajouter de la valeur à l'entreprise. Ce sont par exemple la formation, le développement de logiciels, la réputation et la marque, la recherche et développement, le design de produits et services ou l'amélioration des processus de l'entreprise.

Q5 : ROTATE STATEMENTS 1 TO 3

Q5 Have the following investments been reported as "intangible assets" in your company's 2011 balance sheet?

(READ OUT - ONE ANSWER ONLY)

| | | Yes | No | Not applicable (DO NOT READ) | DK/NA |
|--|--|-----|----|------------------------------|-------|
|--|--|-----|----|------------------------------|-------|

| | | | | | |
|---|--------------------------------------------------------------------------------------------------|---|---|---|---|
| 1 | Research and development (R&D) | 1 | 2 | 3 | 4 |
| 2 | Software development | 1 | 2 | 3 | 4 |
| 3 | Other (training, design, reputation and branding, organization or business process improvements) | 1 | 2 | 3 | 4 |

NEW

Q6 : ROTATE ITEMS 1 TO 7

Q6 Did any of the following motivate you to invest in the intangible assets mentioned previously?

(READ OUT - MULTIPLE ANSWERS POSSIBLE)

| | |
|----------------------------------------------------------------------------------------------------------|----|
| Improvement of internal skills on the intangible assets | 1, |
| More rapid development of new company services or products | 2, |
| Better economic returns or larger market shares | 3, |
| Better relationships with customers and business partners | 4, |
| Greater efficiency of internal business process | 5, |
| Public financial support (grants, loans and support for recruiting new staff etc.) for intangible assets | 6, |
| Regulatory framework of your industry (environmental regulations, technical standards) | 7, |
| DK/NA | 8, |

NEW

Q7 : ROTATE ITEMS 1 TO 6

Q5 : ROTATION DES PROPOSITIONS 1 A 3

Q5 Est-ce que les investissements suivants ont été reportés comme 'actifs incorporels' dans le bilan 2011 de votre entreprise?

(LIRE - UNE SEULE REPONSE)

| | | Oui | Non | Non applicable (NE PAS LIRE) | NSP/SR |
|--|--|-----|-----|------------------------------|--------|
|--|--|-----|-----|------------------------------|--------|

| | | | | | |
|---|---------------------------------------------------------------------------------------------------------------------------------|---|---|---|---|
| 1 | La Recherche et Développement (R&D) | 1 | 2 | 3 | 4 |
| 2 | Le développement de logiciels | 1 | 2 | 3 | 4 |
| 3 | Autres (formation, design, réputation de l'entreprise et la marque, l'amélioration de l'organisation ou des processus internes) | 1 | 2 | 3 | 4 |

NEW

Q6 : ROTATION DES ITEMS 1 A 7

Q6 Est-ce que les éléments suivants vous ont incité à investir dans les actifs incorporels mentionnés précédemment ?

(LIRE - PLUSIEURS REPONSES POSSIBLES)

| | |
|--------------------------------------------------------------------------------------------------------|----|
| L'amélioration des compétences internes relatives aux actifs incorporels | 1, |
| Le développement plus rapide de nouveaux services ou produits | 2, |
| De meilleurs rendements ou de plus grandes parts de marché | 3, |
| De meilleures relations avec les clients et partenaires commerciaux | 4, |
| Une meilleure efficacité dans les processus internes | 5, |
| Un soutien financier public pour les actifs incorporels (subvention, prêt et aide au recrutement etc.) | 6, |
| Le cadre législatif de votre secteur d'activité (réglementations environnementales, normes techniques) | 7, |
| NSP/SR | 8, |

NEW

Q7 : ROTATION DES ITEMS 1 A 6

Q7 Did any of the following, if any, discourage you from investing in the intangible assets mentioned previously?

(READ OUT – MULTIPLE ANSWERS POSSIBLE)

| | |
|-------------------------------------------------------------------------------------------------------------------|----|
| Accounting rules for reporting capital expenditure are difficult to understand | 1, |
| High costs of the investment | 2, |
| Limited external sources of information or expertise | 3, |
| Unfavourable tax treatment of intangible assets | 4, |
| Limited public financial support (grants, loans, support for recruiting new staff etc.) for intangible assets | 5, |
| Regulatory framework of your industry is difficult to understand (environmental regulations, technical standards) | 6, |
| DK/NA | 7, |

NEW

Q8 : ROTATE STATEMENTS 1 TO 5

Q8 Has the previous investment in intangible assets benefited your company in terms of...?

(READ OUT - ONE ANSWER ONLY)

| | A lot | Some | Little | None | DK/NA |
|------------------------------------------|-------|------|--------|------|-------|
| 1 Sales | 1 | 2 | 3 | 4 | 5 |
| 2 Profit margin | 1 | 2 | 3 | 4 | 5 |
| 3 Skills and qualifications of employees | 1 | 2 | 3 | 4 | 5 |
| 4 Market share | 1 | 2 | 3 | 4 | 5 |
| 5 Overall value of the company | 1 | 2 | 3 | 4 | 5 |

NEW

Q7 Est-ce que les éléments suivants vous ont dissuadé d'investir dans les actifs incorporels mentionnés précédemment ?

(LIRE – PLUSIEURS REPONSES POSSIBLES)

| | |
|---------------------------------------------------------------------------------------------------------------------------------|----|
| Les règles comptables pour reporter les dépenses d'investissement sont difficiles à comprendre | 1, |
| Le coût élevé de l'investissement | 2, |
| Des ressources en termes d'information et d'expertise externes limitées | 3, |
| Un traitement fiscal défavorable des actifs incorporels | 4, |
| Un soutien financier public limité pour les actifs incorporels (subvention, prêt et aide au recrutement etc.) | 5, |
| Le cadre législatif de votre secteur d'activité (réglementation environnementale, normes techniques) est difficile à comprendre | 6, |
| NSP/SR | 7, |

NEW

Q8 : ROTATION DES PROPOSITIONS 1 A 5

Q8 Les investissements passés dans des actifs incorporels ont-ils bénéficié à votre entreprise en termes de... ?

(LIRE - UNE SEULE REPONSE)

| | Beaucoup | Un peu | Très peu | Pas du tout | NSP/SR |
|----------------------------------------------|----------|--------|----------|-------------|--------|
| 1 Ventes | 1 | 2 | 3 | 4 | 5 |
| 2 Marge bénéficiaire | 1 | 2 | 3 | 4 | 5 |
| 3 Compétences et qualifications des salariés | 1 | 2 | 3 | 4 | 5 |
| 4 Parts de marché | 1 | 2 | 3 | 4 | 5 |
| 5 Valeur globale de l'entreprise | 1 | 2 | 3 | 4 | 5 |

NEW

ASK ALL

Q9 : ROTATE STATEMENTS 1 TO 3

Q9 Between 2009 and 2011, did your company introduce any innovations, such as ...?

(READ OUT - ONE ANSWER ONLY)

| | | Yes | No | DK/NA |
|--|--|-----|----|-------|
|--|--|-----|----|-------|

| | | | | |
|---|--------------------------------------------------------------------------------|---|---|---|
| 1 | New or significantly improved products, services or processes | 1 | 2 | 3 |
| 2 | New or significantly improved marketing strategies and distribution methods | 1 | 2 | 3 |
| 3 | New or significantly improved organisational structures and management methods | 1 | 2 | 3 |

NEW

ASK Q10.1 IF CODES 2 TO 7 IN Q2.1 OR Q3.1 AND CODE 1 IN Q9.1, Q9.2 OR Q9.3

ASK Q10.2 IF CODES 2 TO 7 IN Q2.2 OR Q3.2 AND CODE 1 IN Q9.1, Q9.2 OR Q9.3

ASK Q10.3 IF CODES 2 TO 7 IN Q2.3 OR Q3.3 AND CODE 1 IN Q9.1, Q9.2 OR Q9.3

ASK Q10.4 IF CODES 2 TO 7 IN Q2.4 OR Q3.4 AND CODE 1 IN Q9.1, Q9.2 OR Q9.3

ASK Q10.5 IF CODES 2 TO 7 IN Q2.5 OR Q3.5 AND CODE 1 IN Q9.1, Q9.2 OR Q9.3

ASK Q10.6 IF CODES 2 TO 7 IN Q2.6 OR Q3.6 AND CODE 1 IN Q9.1, Q9.2 OR Q9.3

Q10: INT: IF RESPONDENT ASKS WHAT INNOVATION PROJECTS ARE: 'A project whose expected outcome is a new or significantly improved product, service, process, marketing strategy or distribution, organizational or management method').

POSER A TOUS

Q9 : ROTATION DES PROPOSITIONS 1 A 3

Q9 Entre 2009 et 2011, votre entreprise a-t-elle introduit des innovations telles que ... ?

(LIRE - UNE SEULE REPONSE)

| | | Oui | Non | NSP/SR |
|--|--|-----|-----|--------|
|--|--|-----|-----|--------|

| | | | | |
|---|-----------------------------------------------------------------------------------------------------------|---|---|---|
| 1 | Des produits, services ou processus nouveau ou significativement améliorés | 1 | 2 | 3 |
| 2 | Des stratégies marketing et des méthodes de distribution nouvelles ou significativement améliorées | 1 | 2 | 3 |
| 3 | Des structures organisationnelles et des méthodes de management nouvelles ou significativement améliorées | 1 | 2 | 3 |

NEW

POSER Q10.1 IF CODES 2 A 7 EN Q2.1 OU Q3.1 ET CODE 1 EN Q9.1, Q9.2 OU Q9.3

POSER Q10.2 IF CODES 2 A 7 EN Q2.2 OU Q3.2 ET CODE 1 EN Q9.1, Q9.2 OU Q9.3

POSER Q10.3 IF CODES 2 A 7 EN Q2.3 OU Q3.3 ET CODE 1 EN Q9.1, Q9.2 OU Q9.3

POSER Q10.4 IF CODES 2 A 7 EN Q2.4 OU Q3.4 ET CODE 1 EN Q9.1, Q9.2 OU Q9.3

POSER Q10.5 IF CODES 2 A 7 EN Q2.5 OU Q3.5 ET CODE 1 EN Q9.1, Q9.2 OU Q9.3

POSER Q10.6 IF CODES 2 A 7 EN Q2.6 OU Q3.6 ET CODE 1 EN Q9.1, Q9.2 OU Q9.3

Q10: (ENQ: SI LE REpondant DEMANDE CE QU'EST UN PROJET D'INNOVATION: 'Un projet dont le résultat est un produit, un service, un processus, une stratégie marketing ou de distribution, une méthode d'organisation ou de management nouveau/nouvelle ou significativement amélioré(e)').

Q10 : ROTATE STATEMENTS 1 TO 6

Q10 On average, what proportion of the investments you made between 2009 and 2011 in each of the following intangible assets related to innovation projects?

(READ OUT - ONE ANSWER ONLY)

| | | 0% | Less than 1% | 1 - 5 % | More than 5 to 15% | More than 15 to 25% | More than 25 to 50% | More than 50% | DK/NA |
|--|--|----|--------------|---------|--------------------|---------------------|---------------------|---------------|-------|
|--|--|----|--------------|---------|--------------------|---------------------|---------------------|---------------|-------|

| | | | | | | | | | |
|---|------------------------------------------------------------------------------|---|---|---|---|---|---|---|---|
| 1 | Training | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| 2 | Software development excluding research and development (R&D) and web design | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| 3 | Company reputation and branding | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| 4 | Research and development (R&D) | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| 5 | Design of products and services (excluding research and development (R&D)) | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| 6 | Organization or business process improvements | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |

NEW

Q10 : ROTATION DES PROPOSITIONS 1 A 6

Q10 En moyenne, quelle proportion des investissements faits dans les actifs incorporels, entre 2009 et 2011, était liée à des projets d'innovation ?

(LIRE - UNE SEULE REPONSE)

| | | 0% | Moins de 1% | Plus de 1 à 5 % | Plus de 5 à 15% | Plus de 15 à 25% | Plus de 25 à 50% | Plus de 50% | NSP /SR |
|--|--|----|-------------|-----------------|-----------------|------------------|------------------|-------------|---------|
|--|--|----|-------------|-----------------|-----------------|------------------|------------------|-------------|---------|

| | | | | | | | | | |
|---|----------------------------------------------------------------------------------------|---|---|---|---|---|---|---|---|
| 1 | La formation | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| 2 | Le développement de logiciels en excluant la Recherche & Développement et le webdesign | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| 3 | La réputation de l'entreprise et la marque | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| 4 | La Recherche et Développement (R&D) | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| 5 | Le design de produits ou services (en excluant la Recherche & Développement (R&D)) | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| 6 | L'amélioration de l'organisation ou des processus internes | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |

NEW

FLASH EUROBAROMETER 369

"Investing in Intangibles: Economic Assets and Innovation Drivers for Growth" TECHNICAL SPECIFICATIONS

Between the 22nd of January and the 19th of February 2013, TNS Political & Social, a consortium created between TNS political & social, TNS UK and TNS opinion, carried out the survey FLASH EUROBAROMETER 369 about "Investing in Intangibles: Economic Assets and Innovation Drivers for Growth".

~~This survey has been requested by the EUROPEAN COMMISSION, Directorate General for Enterprise and Industry. It is a general public survey co-ordinated by the Directorate General for Communication ("Research and Speechwriting" Unit). The FLASH EUROBAROMETER 369 covers the population of the respective nationalities of the European Union Member States, resident in each of the 27 Member States and aged 15 years and over. It was also conducted in Croatia, Iceland, Japan, Norway, Republic of Serbia, Switzerland, Turkey, the Former Yugoslav Republic of Macedonia and the United States. The survey covers the national population of citizens in these countries as well as the population of citizens of all the European Union Member States who are residents in these countries and have a sufficient command of the national languages to answer the questionnaire. All interviews were carried using the TNS e-Call center (our centralized CATI system). In every country respondents were called both on fixed lines and mobile phones. The basic sample design applied in all states is multi-stage random (probability). In each household, the respondent was drawn at random following the "last birthday rule".~~

~~TNS has developed its own RDD sample generation capabilities based on using contact telephone numbers from responders to random probability or random location face to face surveys, such as Eurobarometer, as seed numbers. The approach works because the seed number identifies a working block of telephone numbers and reduces the volume of numbers generated that will be ineffective. The seed numbers are stratified by NUTS2 region and urbanisation to approximate a geographically representative sample. From each seed number the required sample of numbers are generated by randomly replacing the last two digits. The sample is then screened against business databases in order to exclude as many of these numbers as possible before going into field. This approach is consistent across all countries. [ERRONEOUS TEXT CROSSED OUT BY THE DATA ARCHIVE - SEE NEXT PAGE]~~

INTRODUCTION

This Flash Eurobarometer, "Investing in Intangibles: Economic Assets and Innovation Drivers for Growth" (No 369), was conducted at the request of the Directorate-General for Enterprise and Industry. The survey was designed to explore companies' investment in a range of intangible assets. Intangible assets are non-financial, non-physical assets. They are created over time and through investment, and are identifiable as separate assets. They may add value to the company. Examples of intangible assets include training, software development, reputation and branding, research and development, the design of products and services or business process improvements. Intangible assets are increasingly recognised as playing an important role in the growth of developed economies, although their impact has been identified as difficult to quantify¹.

More specifically the survey was designed to investigate:

- The kinds of intangible assets companies invest in
- Companies' use of internal or external resources when investing in intangible assets
- Why companies invest in intangible assets, and what barriers they perceive when making such investments
- The perceived length of benefit from investing in intangible assets
- The links between innovation projects and investment in intangible assets

We would like to thank the Joint Research Centre of the European Commission for their contribution to the questionnaire².

This survey was carried out by TNS Opinion & Social network between 22nd January and 19th February 2013 in the 27 Member States of the European Union and in Croatia, Iceland, Japan, Norway, Republic of Serbia, Switzerland, Turkey, the Former Yugoslav Republic of Macedonia and the United States, where the same target group was interviewed. It is a business to business survey co-ordinated by the Directorate-General for Communication ("Research and Speechwriting" Unit). This survey covers businesses employing 1 or more persons in the Manufacturing (NACE category C), Services (NACE categories G/H/I/J/K/L/M/N/R) and Industry (NACE categories D/E/F). The sample was selected from an international database, with some additional sample from local sources where necessary.

¹ <http://www.iareg.org/index.php?id=23>

² The questionnaire was prepared under the scientific guidance of Sandro Montresor from the Institute for Prospective Technological Studies (IPTS) of the JRC. The contribution of Giulio Perani, from the Italian National Institute for Statistics (Istat), is acknowledged.

Readers are reminded that survey results are estimations, the accuracy of which, everything being equal, rests upon the sample size and upon the observed percentage. With samples of about 1,000 interviews, the real percentages vary within the following confidence limits:

| Statistical Margins due to the sampling process (at the 95% level of confidence) | | | | | | | | | | | |
|-------------------------------------------------------------------------------------|-----|-----|-----|------|------|------------------------------------------------|------|------|------|------|---------|
| <i>various sample sizes are in rows</i> | | | | | | <i>various observed results are in columns</i> | | | | | |
| | 5% | 10% | 15% | 20% | 25% | 30% | 35% | 40% | 45% | 50% | |
| | 95% | 90% | 85% | 80% | 75% | 70% | 65% | 60% | 55% | 50% | |
| N=50 | 6,0 | 8,3 | 9,9 | 11,1 | 12,0 | 12,7 | 13,2 | 13,6 | 13,8 | 13,9 | N=50 |
| N=500 | 1,9 | 2,6 | 3,1 | 3,5 | 3,8 | 4,0 | 4,2 | 4,3 | 4,4 | 4,4 | N=500 |
| N=1000 | 1,4 | 1,9 | 2,2 | 2,5 | 2,7 | 2,8 | 3,0 | 3,0 | 3,1 | 3,1 | N=1000 |
| N=1500 | 1,1 | 1,5 | 1,8 | 2,0 | 2,2 | 2,3 | 2,4 | 2,5 | 2,5 | 2,5 | N=1500 |
| N=2000 | 1,0 | 1,3 | 1,6 | 1,8 | 1,9 | 2,0 | 2,1 | 2,1 | 2,2 | 2,2 | N=2000 |
| N=3000 | 0,8 | 1,1 | 1,3 | 1,4 | 1,5 | 1,6 | 1,7 | 1,8 | 1,8 | 1,8 | N=3000 |
| N=4000 | 0,7 | 0,9 | 1,1 | 1,2 | 1,3 | 1,4 | 1,5 | 1,5 | 1,5 | 1,5 | N=4000 |
| N=5000 | 0,6 | 0,8 | 1,0 | 1,1 | 1,2 | 1,3 | 1,3 | 1,4 | 1,4 | 1,4 | N=5000 |
| N=6000 | 0,6 | 0,8 | 0,9 | 1,0 | 1,1 | 1,2 | 1,2 | 1,2 | 1,3 | 1,3 | N=6000 |
| N=7000 | 0,5 | 0,7 | 0,8 | 0,9 | 1,0 | 1,1 | 1,1 | 1,1 | 1,2 | 1,2 | N=7000 |
| N=7500 | 0,5 | 0,7 | 0,8 | 0,9 | 1,0 | 1,0 | 1,1 | 1,1 | 1,1 | 1,1 | N=7500 |
| N=8000 | 0,5 | 0,7 | 0,8 | 0,9 | 0,9 | 1,0 | 1,0 | 1,1 | 1,1 | 1,1 | N=8000 |
| N=9000 | 0,5 | 0,6 | 0,7 | 0,8 | 0,9 | 0,9 | 1,0 | 1,0 | 1,0 | 1,0 | N=9000 |
| N=10000 | 0,4 | 0,6 | 0,7 | 0,8 | 0,8 | 0,9 | 0,9 | 1,0 | 1,0 | 1,0 | N=10000 |
| N=11000 | 0,4 | 0,6 | 0,7 | 0,7 | 0,8 | 0,9 | 0,9 | 0,9 | 0,9 | 0,9 | N=11000 |
| N=12000 | 0,4 | 0,5 | 0,6 | 0,7 | 0,8 | 0,8 | 0,9 | 0,9 | 0,9 | 0,9 | N=12000 |
| N=13000 | 0,4 | 0,5 | 0,6 | 0,7 | 0,7 | 0,8 | 0,8 | 0,8 | 0,9 | 0,9 | N=13000 |
| N=14000 | 0,4 | 0,5 | 0,6 | 0,7 | 0,7 | 0,8 | 0,8 | 0,8 | 0,8 | 0,8 | N=14000 |
| N=15000 | 0,3 | 0,5 | 0,6 | 0,6 | 0,7 | 0,7 | 0,8 | 0,8 | 0,8 | 0,8 | N=15000 |
| | 5% | 10% | 15% | 20% | 25% | 30% | 35% | 40% | 45% | 50% | |
| | 95% | 90% | 85% | 80% | 75% | 70% | 65% | 60% | 55% | 50% | |

| ABBR. | COUNTRIES | INSTITUTES | N° INTERVIEWS | FIELDWORK DATES | | POPULATION 15+ |
|-----------------------|--------------------------------------|-------------------------|------------------|--------------------|-------------------|-------------------|
| BE | Belgium | TNS Dimarso | 300 | 28/01/2013 | 11/02/2013 | 572.234 |
| BG | Bulgaria | TNS BBSS | 301 | 29/01/2013 | 04/02/2013 | 294.587 |
| CZ | Czech Rep. | TNS Aisa s.r.o | 302 | 28/01/2013 | 08/02/2013 | 995.870 |
| DK | Denmark | TNS Gallup A/S | 302 | 28/01/2013 | 12/02/2013 | 280.192 |
| DE | Germany | TNS Infratest | 499 | 28/01/2013 | 14/02/2013 | 2.176.111 |
| EE | Estonia | TNS Emor | 205 | 28/01/2013 | 29/01/2013 | 54.526 |
| EL | Greece | TNS ICAP | 300 | 28/01/2013 | 14/02/2013 | 535.717 |
| ES | Spain | TNS Demoscopia S.A | 500 | 28/01/2013 | 13/02/2013 | 2.599.951 |
| FR | France | TNS Sofres | 500 | 28/01/2013 | 15/02/2013 | 2.707.181 |
| IE | Ireland | IMS Millward Brown | 300 | 28/01/2013 | 19/02/2013 | 164.047 |
| IT | Italy | TNS ITALIA | 500 | 28/01/2013 | 15/02/2013 | 3.974.602 |
| CY | Rep. of Cyprus | CYMAR | 100 | 28/01/2013 | 31/01/2013 | 47.794 |
| LV | Latvia | TNS Latvia | 202 | 28/01/2013 | 14/02/2013 | 83.951 |
| LT | Lithuania | TNS LT | 202 | 28/01/2013 | 31/01/2013 | 118.312 |
| LU | Luxembourg | TNS Dimarso | 100 | 28/01/2013 | 11/02/2013 | 29.618 |
| HU | Hungary | TNS Hoffmann Kft | 300 | 28/01/2013 | 13/02/2013 | 586.603 |
| MT | Malta | MISCO International Ltd | 100 | 28/01/2013 | 13/02/2013 | 49.233 |
| NL | Netherlands | TNS NIPO | 500 | 28/01/2013 | 15/02/2013 | 888.380 |
| AT | Austria | TNS Austria | 300 | 28/01/2013 | 14/02/2013 | 311.258 |
| PL | Poland | TNS OBOP | 500 | 28/01/2013 | 13/02/2013 | 1.557.706 |
| PT | Portugal | TNS EUROTESTE | 300 | 28/01/2013 | 07/02/2013 | 893.812 |
| RO | Romania | TNS CSOP | 501 | 28/01/2013 | 08/02/2013 | 455.192 |
| SI | Slovenia | RM PLUS | 200 | 30/01/2013 | 11/02/2013 | 119.908 |
| SK | Slovakia | TNS AISA Slovakia | 300 | 28/01/2013 | 15/02/2013 | 414.824 |
| FI | Finland | TNS Gallup Oy | 300 | 28/01/2013 | 14/02/2013 | 236.687 |
| SE | Sweden | TNS SIFO | 301 | 28/01/2013 | 14/02/2013 | 677.320 |
| UK | United Kingdom | TNS UK | 500 | 28/01/2013 | 14/02/2013 | 1.747.419 |
| TOTAL EU27 | | | 8.715 | 28/01/2013 | 19/02/2013 | 22.573.035 |
| HR | Croatia | Puls | 200 | 29/01/2013 | 11/02/2013 | 166.195 |
| TR | Turkey | TNS PIAR | 400 | 28/01/2013 | 15/02/2013 | 3.122.434 |
| MK | Former Yugoslav Rep. of Macedonia | TNS Brima | 200 | 31/01/2013 | 07/02/2013 | 61.287 |
| IS | Iceland | Capacent ehf | 200 | 28/01/2013 | 11/02/2013 | 17.403 |
| NO | Norway | TNS Gallup AS | 200 | 28/01/2013 | 13/02/2013 | 295.122 |
| RS | Republic of Serbia | TNS Medium Gallup | 201 | 31/01/2013 | 11/02/2013 | 82.355 |
| US | United States | TNS Custom Research | 501 | 22/01/2013 | 15/02/2013 | 14.510.761 |
| CH | Switzerland | ISOPUBLIC | 200 | 01/02/2013 | 13/02/2013 | 146.219 |
| JP | Japan | Research Freeway | 500 | 22/01/2013 | 15/02/2013 | 2.049.141 |
| TOTAL | | | 11.317 | 28/01/2013 | 19/02/2013 | 43.023.952 |

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