

Flash Eurobarometer 190
July-August 2006
Internal Market: Opinions and experiences
of Businesses in the 10 New Member States

Basic Questionnaire

The GALLUP Organization

DG MARKET QUESTIONNAIRE
June 2006

INTRO:

Good morning/good afternoon. My name is....and I work for.... We are conducting a survey on behalf of the European Commission. Our objective is to assess senior managers' opinion on the European Union Single Market. The Single Market has been formally in operation since the 1st of January 1993. Various economic reforms have been introduced since then to make it easier to do business in the European Union. 10 new Member States joined the Union in May 2004.

We would like to have your opinion on the changes in the general business environment.

INTERVIEWER: IF THE CONTACT PERSON IS NOT GIVEN IN THE SAMPLE, TRY TO REACH THE FOLLOWING PERSONS: THE MANAGING DIRECTOR, GENERAL MANAGER, SALES, MARKETING MANAGER, EXPORT/IMPORT MANAGER, MANAGER OF LOGISTICS.

READ OUT WHEN YOU REACH THE APPROPRIATE PERSON IF DIFFERENT FROM THE FIRST PERSON YOU CONTACTED

May I please speak to the managing director, or to the general manager or to sales, marketing manager or export/import manager, manager of logistics?

A1: What exactly is your title and your responsibility in the company?

[SPECIFY]

[CODE THE MAIN RESPONSIBILITY BELOW – ONLY ONE ANSWER]

- General Management 1
- Sales, Marketing Management, responsible for operations in Europe..... 2
- Import/ Export Management..... 3
- Logistics Management..... 4
- [Other] [STOP INTERVIEW – THANK AND TERMINATE] 5

A2: How many people are in regular employment within your company in [COUNTRY]?

FILTER! [IF LESS THAN 10 EMPLOYEES – STOP INTERVIEW – THANK AND TERMINATE]

IF DK/NA [IF LESS THAN 10 EMPLOYEES – STOP INTERVIEW – THANK AND TERMINATE]

- [DK/NA]..... 9999

..... people

A3: Apart from [COUNTRY], in how many countries of the European Union do you regularly sell products or services?

[IF NONE: CODE 98 AND GO TO A5]

[IF DK/NA: STOP INTERVIEW – THANK AND TERMINATE]

..... countries

- None 98
- [DK/NA]..... 99

A4: On average, about what percentage of your turnover do you generate from sales with these European Union countries?

[IF DK/NA: INSIST TO GET AN ANSWER AND CODE 999 ONLY AFTER INSISTING]

..... %

- [DK/NA]..... 999

A5: Is your company mainly involved in...?

[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 or people 4
- Financial services - banking, insurance, brokerage 5
- Business services..... 6
- Agriculture, mining, extractive industry: [STOP INTERVIEW - THANK AND TERMINATE] 7
- Hotels/ restaurants/ cafes [STOP INTERVIEW - THANK AND TERMINATE] 8
- Personal services [STOP INTERVIEW - THANK AND TERMINATE] 9
- Public administration [STOP INTERVIEW - THANK AND TERMINATE]..... 10
- Other..... 98
- DK/NA [STOP INTERVIEW - THANK AND TERMINATE]..... 99

Q1: I would like to know whether the following European Union Single Market measures have had an impact on your firm's activities?

[READ OUT - ROTATE – ONE ANSWER PER ITEM]

- Positive impact 1
 - No impact 2
 - Negative impact 3
 - Not concerned 4
 - [DK/NA] 9
-
- a) European product standards 1 2 3 4 9
 - b) European labeling and packaging rules 1 2 3 4 9
 - c) European public procurement rules 1 2 3 4 9
 - d) The elimination of customs documentation 1 2 3 4 9
 - e) Abolition of border controls 1 2 3 4 9
 - f) VAT procedures for sales within the EU 1 2 3 4 9
 - g) The liberalization of capital movements 1 2 3 4 9
 - h) Rules for establishing a business in other EU countries 1 2 3 4 9

Q2: For each of the following areas, how important has the influence of the European Union Single Market been for your company's strategy?

[READ OUT - ROTATE – ONE ANSWER PER ITEM]

- Very important 1
 - Rather important 2
 - Rather not important 3
 - Not at all important 4
 - [Not relevant - Not concerned] 5
 - [DK/NA] 9
-
- a) Pricing of your products or services 1 2 3 4 5 9
 - b) Purchasing from other EU countries 1 2 3 4 5 9
 - c) Selling directly to other EU countries 1 2 3 4 5 9
 - d) Distribution in other EU countries 1 2 3 4 5 9
 - e) Offer services in other EU countries 1 2 3 4 5 9
 - f) Setting up businesses in other EU countries 1 2 3 4 5 9
 - g) Investing in companies in other EU countries 1 2 3 4 5 9
 - h) Companies from other EU countries investing in your company 1 2 3 4 5 9
 - i) Co-operation agreements with companies from other EU countries 1 2 3 4 5 9
 - j) Marketing strategy 1 2 3 4 5 9

Q3: As a result of the Single Market, have you noticed an increase or a decrease in the level of COMPETITION in [COUNTRY] coming from...?

[READ OUT – ONE ANSWER PER ITEM]

- Increase 1
 - No change 2
 - Decrease 3
 - [DK/NA] 9
-
- a) Domestic firms 1 2 3 9
 - b) Other EU firms 1 2 3 9
 - c) Non-EU firms 1 2 3 9

Q4: Has your company in [COUNTRY] recruited staff who have moved to [COUNTRY] from another Member State?

[READ OUT – ONLY ONE ANSWER]

- yes 1
- no 2
- [DK/NA] 9

FILTER! [IF YES: => GO TO Q6]
 FILTER! [IF DK/NA: => GO TO Q6]

[IF CODE 2 IN Q4]

Q5: What are the main reasons your company has not recruited any staff from another Member State?

Tell me what is the most important?

And let me read it again, and tell me that what is the next most important reason?

[READ OUT – ROTATE]

- Administrative difficulties related to social security rights..... 01
 - Difficulties with pension provision including portability 02
 - Candidates poor language skills 03
 - Difficulties in assessing professional experience or qualifications 04
 - Candidates reluctance to move because of family considerations..... 05
 - Lack of information about how to find and recruit staff in other Member States 06
 - Wage differentials and financial incentives 07
-
- [Sufficient local or national employment market]..... 09
 - [Other]..... 10
 - [DK/NA]..... 99

MOST IMPORTANT
SECOND MOST IMPORTANT

[TO ALL]

Q6: For each of the following, could you please tell me whether the 2004 enlargement of the EU had a positive or negative effect on...

- Positive impact 1
- No impact 2
- Negative impact 3
- [DK/NA] 9

[READ OUT - ROTATE – ONE ANSWER PER ITEM]

- a) The cost of raw materials 1 2 3 9
- b) The cost of wages 1 2 3 9
- c) Access to new markets 1 2 3 9
- d) Selling prices 1 2 3 9
- e) Productivity 1 2 3 9
- f) Profitability 1 2 3 9
- g) Growth in employment 1 2 3 9

Q7: Could you please tell me whether your company engages in the trade of products or services with one or more old EU Member States?

[READ OUT – ONLY ONE ANSWER]

- Yes, for less than 2 years 1
- Yes, for more than 2 years 2
- No, but I intend doing so over the next 3 years 3
- No, and I don't intend doing so over the next 3 years 4
- [DK/NA]..... 9

Q8: I would like to mention a number of activities which could be part of future Single Market policy. Could you tell me whether you consider that for your company it is very important, rather important, rather unimportant or not important at all that future Single Market Policy tackles the question of...

[READ OUT - ROTATE – ONE ANSWER PER ITEM]

- Very important 1
 - Rather important 2
 - Rather not important 3
 - Not at all important 4
 - [DK/NA] 9
-
- a) Removing remaining technical barriers to trade in goods 1 2 3 4 9
 - b) Removing remaining technical barriers to trade in services 1 2 3 4 9
 - c) Creating a patent valid in all EU countries..... 1 2 3 4 9
 - d) Strengthening intellectual property rights protection 1 2 3 4 9
 - e) Further opening up of public procurement markets..... 1 2 3 4 9
 - f) Achieving an integrated European financial market 1 2 3 4 9
 - g) Ensuring fair competition within the Single Market..... 1 2 3 4 9

- h) A further opening-up to competition of public utility services such as telecommunication services, transport and postal services, energy supply 1 2 3 4 9
- i) Ensuring that companies can do business throughout the Single Market on the basis of one set of rules instead of 25 or more sets of national rules 1 2 3 4 9
- j) Facilitating labour mobility 1 2 3 4 9

[ONLY TO THOSE WHO ANSWERED '98' AT A3]

Q9: What is the main reason your company is not exporting to other countries within the Single Market?

[READ OUT – ROTATE – ONLY ONE ANSWER]

- You have not yet considered the possibility 1
- Your products are not suitable for export 2
- You would like to export but you would need more information 3
- You would like to export but you are worried about encountering barriers 4
- You have already tried to export, but encountered problems..... 5
- Your local demand is sufficient..... 6
- You lack the financial means to export..... 7
- Other [SPECIFY]..... 8
- [DK/NA]..... 9

Survey details

This telephone survey Flash Eurobarometer 190: “Internal market in the New Member States” was conducted on behalf of Market and Services Directorate General of the European Commission. The objective of the survey Flash Eurobarometer 190: “Internal Market in the New Member States” is to study senior managers’ opinion on the changes in the general business environment in the European Union Single Market, on the various economic reforms introduced to make doing business easier in the European Union.

The current special target group Flash Eurobarometer survey was organised and managed by the Eurobarometer Team of the European Commission (Directorate-General Communication, Unit A-4).

The interviews were conducted between the 27th of July and the 4th of August 2006 by the partner institutes of The Gallup Organization Hungary / Europe:

Czech Republic	CZ	Focus Agency	(Interviews : 27/07/2006 – 02/08/2006)
Estonia	EE	Saar Poll	(Interviews : 31/07/2006 – 04/08/2006)
Cyprus	CY	CYMAR	(Interviews : 27/07/2006 – 31/07/2006)
Latvia	LV	Latvian Facts	(Interviews : 01/08/2006 – 04/08/2006)
Lithuania	LT	Baltic Survey	(Interviews : 27/07/2006 – 02/08/2006)
Hungary	HU	Gallup Hungary	(Interviews : 27/07/2006 – 02/08/2006)
Malta	MT	MISCO	(Interviews : 27/07/2006 – 28/07/2006)
Poland	PL	Gallup Poland	(Interviews : 28/07/2006 – 03/08/2006)
Slovenia	SI	Cati d.o.o.	(Interviews : 27/07/2006 – 01/08/2006)
Slovakia	SK	Focus Agency	(Interviews : 27/07/2006 – 03/08/2006)

Representativeness of the results

The target for this Flash Eurobarometer was defined as all companies – agriculture, non-profit and public administration excluded – employing 10 to 249 persons, in the 10 New Member States of the European Union.

Lists of companies qualified to be interviewed were developed by national institutes using local statistical data sources. Sampling in each country was made according to two stratification criteria: the size of the company (3 categories: 10-49, 50-249 and 250+ employees), and the activity sector (6 categories: Construction or civil engineering, Production and manufacturing of goods, Trade and distribution (wholesale or retail), Transport (of goods or people), Financial services (banking, insurance, brokerage), Business services). Within each of the cells defined by these criteria, the selection of the sample units was made at random.

The total sample was distributed between these sampling "cells" in a way which does not follow the actual distribution of businesses within the NMS zone: the small countries as well as the larger businesses were intentionally “over-sampled” in order to get meaningful results for each sample segment.

During the data processing, each cell in the cross distribution of the sample was re-weighted up or down according to its real weight within the NMS zone. Thus, the total results presented are not affected by over- and under-samplings, and are representative of the total universe examined.

The person interviewed in each company was a top level executive (general manager, sales/marketing manager, import/export manager, logistics manager.). The interviewers checked the identity of this

person as well as the accuracy of the enterprise sampling characteristics, as delivered by sample list, namely: the number of employees and the activity sector.

Sizes of the samples

The target sample sizes range from 100 up to 300 businesses, depending on the countries. Below are presented the exact numbers of interviews conducted in each country.

	Interviews Conducted
Total	2552
Czech Republic	300
Estonia	206
Cyprus	220
Latvia	207
Lithuania	204
Hungary	303
Malta	209
Poland	503
Slovenia	200
Slovakia	200

Questionnaires

The institutes listed above translated the questionnaire to their respective national language(s) using a centralized process of back-translation procedure.

Further details

For further details you may contact Gallup or The European Commission. The relevant contacts are:

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