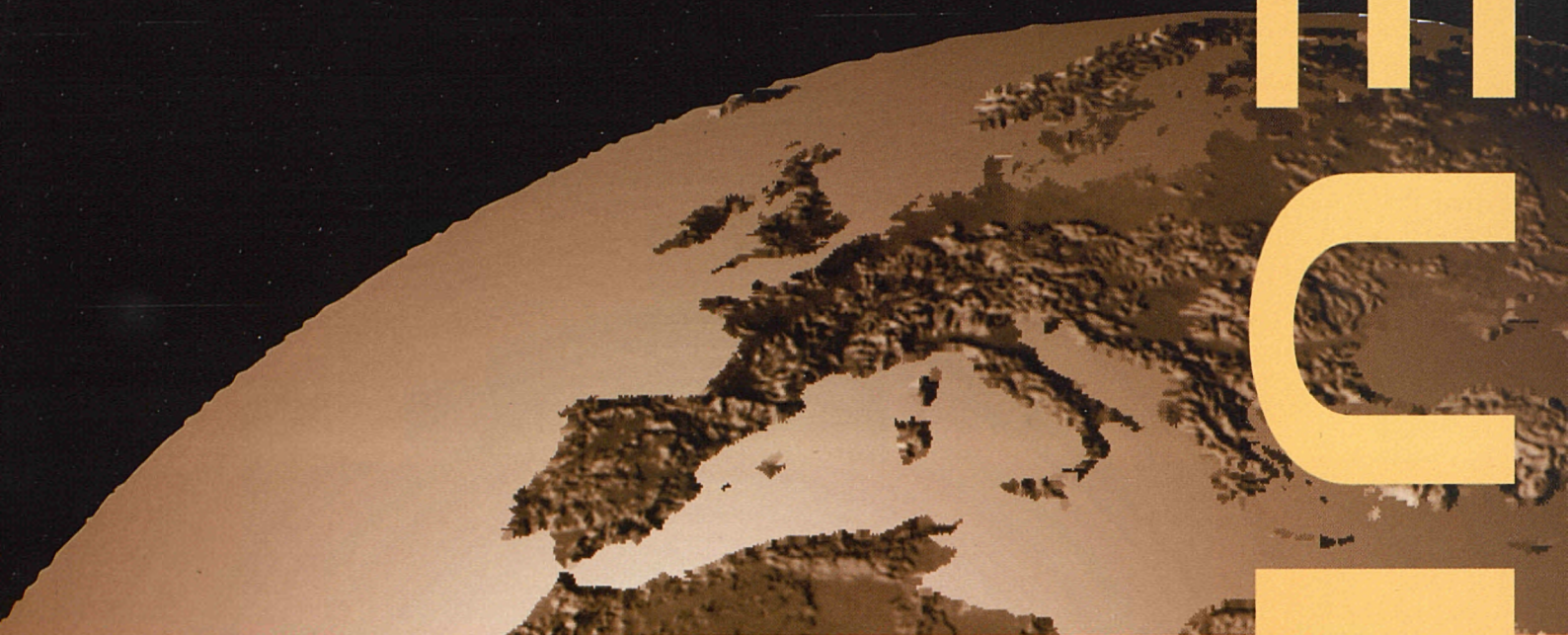


The Single Market Review



REPORT

Results of the business survey



The Single Market Review

RESULTS OF THE BUSINESS SURVEY

The Single Market Review series

Subseries I — Impact on manufacturing

Volume:	1	Food, drink and tobacco processing machinery
	2	Pharmaceutical products
	3	Textiles and clothing
	4	Construction site equipment
	5	Chemicals
	6	Motor vehicles
	7	Processed foodstuffs
	8	Telecommunications equipment

Subseries II — Impact on services

Volume:	1	Insurance
	2	Air transport
	3	Credit institutions and banking
	4	Distribution
	5	Road freight transport
	6	Telecommunications: liberalized services
	7	Advertising
	8	Audio-visual services and production
	9	Single information market
	10	Single energy market
	11	Transport networks

Subseries III — Dismantling of barriers

Volume:	1	Technical barriers to trade
	2	Public procurement
	3	Customs and fiscal formalities at frontiers
	4	Industrial property rights
	5	Capital market liberalization
	6	Currency management costs

Subseries IV — Impact on trade and investment

Volume:	1	Foreign direct investment
	2	Trade patterns inside the single market
	3	Trade creation and trade diversion
	4	External access to European markets

Subseries V — Impact on competition and scale effects

Volume:	1	Price competition and price convergence
	2	Intangible investments
	3	Competition issues
	4	Economies of scale

Subseries VI — Aggregate and regional impact

Volume:	1	Regional growth and convergence
	2	The cases of Greece, Spain, Ireland and Portugal
	3	Trade, labour and capital flows: the less developed regions
	4	Employment, trade and labour costs in manufacturing
	5	Aggregate results of the single market programme

Results of the business survey

E U R O P E A N C O M M I S S I O N

The Single Market Review

RESULTS OF THE BUSINESS SURVEY

The Single Market Review

OFFICE FOR OFFICIAL PUBLICATIONS
OF THE EUROPEAN COMMUNITIES

KOGAN PAGE . EARTHSCAN

The 1996 Single Market Review responds to a 1992 Council of Ministers Resolution calling on the European Commission to present an overall analysis of the effectiveness of measures taken in creating the Single Market. This survey forms part of a series of 39 studies which assess the progress made in implementing the Single Market Programme. It was carried out in 1995 on a sample of randomly selected enterprises representative of the European Union's production structure in terms of sector of activity, size and Member State of residence.

The operation was coordinated by

Eurostat, with the assistance of **DG XV** (Internal Market and Financial Services)
and **DG II** (Economic and Financial Affairs).

Data collection was carried out by the following bodies (National Statistical Institutes*):
INS* (Belgium), Statistics Denmark*, IFO (Germany), National Statistical Service of Greece*, Ministry of Industry and Energy (Spain), INSEE* (France), ESRO in cooperation with CSO* (Ireland), ISTAT* (Italy), Statec* (Luxembourg), NEI in cooperation with Statistics Netherlands*, INE* (Portugal), NSO* (United Kingdom).

The European Commission would like to express thanks to the national experts and representatives of firms for their contribution to the 1996 Single Market Review, and to this survey in particular.

© European Communities, 1997

No part of this book may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, photocopying, recording or otherwise without written permission from the copyright holder.

Office for Official Publications of the European Communities
2 rue Mercier, L-2985 Luxembourg
ISBN 92-827-8811-3

Catalogue number: C1-99-96-996-EN-C

Kogan Page.Earthscan
120 Pentonville Road, London N1 9JN
ISBN 0 7494 2344 7

Table of contents

List of tables	vii
List of figures	xii
List of abbreviations	xiii
Foreword	xv
Acknowledgements	xvi
1. Introduction	1
2. Analysis of results	3
2.1. Introduction	3
2.2. Business perception of the single market	3
2.2.1. The single market has been successful in removing barriers to trade...	3
2.2.2. ... and is considered by firms to have had some impact on their performance	4
2.2.3. ... but a limited impact on sector performances	5
2.3. Analysis of the effectiveness of the main SMP measures	7
2.3.1. Removal of physical barriers to trade	8
2.3.2. Removal of technical barriers to trade	9
2.4. The SM and the competition level on the domestic market – effects in terms of costs	12
2.4.1. Increase in the competition level	12
2.4.2. Effects on unit costs	14
2.5. The impact of the SMP on the enterprises and their business strategy	15
2.5.1. Effects on firms' operations	15
2.5.2. Importance to the development of enterprises' strategy	17
2.6. Conclusions	19
3. Aggregate results for EUR-12	21
3.1. Manufacturing sectors	21
3.2. Construction sectors	26
3.3. Distributive trade sectors	30
3.4. Other services sectors	32
3.5. Results of open questions	35
4. Unadjusted results item by item	41
4.1. Manufacturing sectors	41
4.2. Distributive trade sectors	105

4.3.	Other services sectors	129
5.	Comparison of countries, sectors and size classes	153
5.1.	Structure effect and opinion effect	153
5.1.1.	Definition	153
5.1.2.	Overview of results	153
5.2.	Tables	155
6.	Multidimensional analysis	159
6.1.	Correlations	159
6.2.	Correspondence analysis of all characteristics	159
6.3.	Cross-tabulation of a selection of characteristics	164
6.4.	Multidimensional analysis by block of homogeneous questions (manufacturing)	171
6.4.1.	Impact of measures on companies' activities	171
6.4.2.	Impact of measures on companies' operations	173
6.4.3.	Strategic importance	175
6.4.4.	Competition	177
6.5.	Costs	179
6.6.	Legislation	181
7.	Description of the survey	185
7.1.	Questionnaire and data collection	186
7.2.	Size of the sample and response rate	197
8.	Additional survey characteristics	199
8.1.	Imputation of non-response and non-response survey	199
8.1.1.	Partial imputation	199
8.1.2.	Stratification	199
8.1.3.	Complementary survey on non-respondents	200
8.1.4.	Special investigation on the behaviour of non-respondents	200
8.2.	Different types of estimates	201
8.3.	Calculation of confidence intervals	202
8.4.	Definition of opinion effect and structure effect	231
8.4.1.	Definition	231
8.4.2.	Mathematical formulation	231
9.	General information about businesses in Europe	233
10.	How to get more information	241

List of tables

Analysis of results:

Table 2.1.	The SMP has been successful in eliminating obstacles to EU trade in your sector	4
Table 2.2.	The SMP has been a success for your firm	5
Table 2.3.	The SMP as it affects your sector, at national and EU levels	6
Table 3.1.	Impact of single market measures on firms in the manufacturing sector	7
Table 3.2.	Impact of single market measures on firms in the services sector	8
Table 3.3.	Impact of single market measures aimed at removing technical barriers	9
Table 3.4.	Impact on firms of the change in VAT procedures for intra-EU sales	11
Table 4.1.	Change in competition level on the domestic market in recent years	13
Table 4.2.	Increase in competition level on the domestic market on the basis of price in recent years. Percentages	13
Table 4.3.	Impact of the SMP on enterprises' unit costs by size. Manufacturing sector. Percentages	14
Table 4.4.	Changes in unit costs. Importance of the measures contributing to the changes. Manufacturing sector. Weighted by number of employees. Percentages	15
Table 5.1.	The effect of the SMP on enterprises' operations. Manufacturing and service sectors. Weighted by number of employees. Percentages	16
Table 5.2.	The effect of the SMP on sales to other EU countries. Weighted by number of employees. Percentages	16
Table 5.3.	The importance of the SMP to the development of the firms' strategy in recent years. Manufacturing sector. Weighted by number of employees. Percentages	17
Table 5.4.	The importance of the SMP to the development of the firms' strategy in recent years. Services sector. Weighted by number of employees. Percentages	18
Table 5.5.	The importance of the SMP on research and development of new products/services in recent years at the sectoral level. All sectors. Weighted by number of employees. Percentages	19

EUR summary of manufacturing:

Table EUR M.1.	Single market's impact on your firm	21
Table EUR M.2.	Single market's impact on your company's operations	22
Table EUR M.3.	Single market's importance to development of strategy	23
Table EUR M.4.	Any change in competition levels in the domestic market	24
Table EUR M.5.	The extent to which the implementation of the SMP has affected unit costs	24
Table EUR M.6.	Importance in changing unit costs	25
Table EUR M.7.	Single market legislation as it affects your own firm or sector	25

EUR summary of the construction sector:

Table EUR C.1.	Single market's impact on your firm	26
Table EUR C.2.	Single market's impact on your company's operations	26
Table EUR C.3.	Single market's importance to development of strategy	27

Table EUR C.4.	Any change in competition levels in the domestic market	28
Table EUR C.5.	Single market legislation's effect on your firm or sector	29

EUR summary of the distributive trades:

Table EUR D.1.	Single market's impact on your firm	30
Table EUR D.2.	Single market's impact on your company's operations	30
Table EUR D.3.	Single market's importance to development of strategy	31
Table EUR D.4.	Any change in competition levels in the domestic market	31
Table EUR D.5.	Single market legislation as it affects your own firm or sector	32

EUR summary of other services:

Table EUR S.1.	Single market's impact on your firm	32
Table EUR S.2.	Single market's impact on your company's operations	33
Table EUR S.3.	Single market's importance to development of strategy	33
Table EUR S.4.	Any change in competition levels in the domestic market	34
Table EUR S.5.	Single market legislation as it affects your own firm or sector	34

Open questions:

Table OQ M.1.	Manufacturing sector: Additional measures needed to create a genuine single market	36
Table OQ M.2.	Manufacturing sector: Additional measures needed to eliminate obstacles to EU trade	37
Table OQ S.1.	Services sector: Additional measures needed to create a genuine single market	38
Table OQ S.2.	Services sector: Additional measures needed to eliminate obstacles to EU trade	39

Detailed manufacturing:

Single market's impact on your firm:

Table M.1.	Harmonization of technical regulations and/or standards	42
Table M.2.	Mutual recognition of technical regulations and/or standards	43
Table M.3.	Conformity assessment procedures	44
Table M.4.	Simplified patenting procedures	45
Table M.5.	The opening up of public procurement	46
Table M.6.	The elimination of customs documentation	47
Table M.7.	Deregulation of freight transport	48
Table M.8.	The elimination of delays at frontiers	49
Table M.9.	The change in VAT procedures for intra-EU sales	50
Table M.10.	The liberation of capital movements	51
Table M.11.	Double-taxation agreements	52

Single market's impact on your company's operations:

Table M.12.	Sales to the domestic market	53
Table M.13.	Sales to other EU countries	54
Table M.14.	Sales to non-EU countries	55
Table M.15.	Productivity	56
Table M.16.	Profitability	57
Table M.17.	Employment	58

Single market's importance to development of strategy:

Table M.18.	Product standardization	59
Table M.19.	Product specialization	60
Table M.20.	Pricing	61
Table M.21.	Research and development of new products	62
Table M.22.	Capacity of existing national production	63
Table M.23.	Number of existing production plants	64
Table M.24.	Establishment of plants in other EU states	65
Table M.25.	Lean production methods	66
Table M.26.	Penetration of markets in other EU states	67
Table M.27.	Advertising in other EU markets	68
Table M.28.	Distribution networks in other EU markets	69
Table M.29.	Pan-European labelling	70
Table M.30.	Purchase of raw materials from other EU markets	71
Table M.31.	Purchase of components from other EU markets	72
Table M.32.	Purchase of business services from other EU markets	73
Table M.33.	Purchase of financial services from other EU markets	74
Table M.34.	Direct investment in other companies	75
Table M.35.	Direct investment from other companies	76
Table M.36.	Co-operation agreements with other companies	77

Any change in competition levels in the domestic market:

Table M.37.	Competitors: domestically owned enterprises	78
Table M.38.	Competitors: other EU-owned enterprises	79
Table M.39.	Competitors: non EU-owned enterprises	80
Table M.40.	Price competition: domestically owned enterprises	81
Table M.41.	Price competition: other EU- owned enterprises	82
Table M.42.	Price competition: non EU-owned enterprises	83
Table M.43.	Quality competition: domestically owned enterprises	84
Table M.44.	Quality competition: other EU-owned enterprises	85
Table M.45.	Quality competition: non-EU-owned enterprises	86
Table M.46.1	The extent to which the implementation of the SMP has affected - Unit cost of typical or average product (sub table 1)	87
Table M.46.2.	The extent to which the implementation of the SMP has affected - Unit cost of typical or average product (sub table 2)	88
Table M.46.3.	The extent to which the implementation of the SMP has affected - Unit cost of typical or average product (sub table 3)	89

Importance in changing unit costs:

Table M.47.	Production process	90
Table M.48.	Testing and certification	91
Table M.49.	Distribution costs	92
Table M.50.	Marketing costs	93
Table M.51.	Costs of raw materials	94
Table M.52.	Banking costs	95
Table M.53.	Insurance costs	96
Table M.54.	Other cost sources	97

Single market legislation as it affects your own firm or sector:

Table M.55.	The SMP has been a success for your firm	98
Table M.56.	The SMP has been a success for your sector in your country	99
Table M.57.	The SMP has been a success for your sector in the EU	100
Table M.58.	The SMP has been successful in eliminating obstacles to EU trade in your sector	101
Table M.59.	The SMP has been successful in creating a genuine single market	102
Table M.60.	Additional measures are needed to eliminate obstacles to EU trade	103
Table M.61.	Additional measures are needed in this sector to create a genuine single market	104

Detailed distributive trades:

Tables D.1.–D.7.	Single market's impact on your firm	106
Tables D.8.–D.13.	Single market's impact on your company's operations	110
Tables D.14.–D.27.	Single market's importance to the development of strategy	113
Tables D.28.–D.36.	Any change in competition levels in the domestic market	120
Tables D.37.–D.43.	Single market legislation as it affects your own firm or sector	125

Detailed other services:

Tables S.1.–S.7.	Single market's impact on your firm	130
Tables S.8.–S.13.	Single market's impact on your company's operations	134
Tables S.14.–S.27.	Single market's importance to the development of strategy	137
Tables S.28.–S.36.	Any change in competition levels in the domestic market	144
Tables S.37.–S.43.	Single market legislation as it affects your own firm or sector	149

Structure effect and opinion effect:

Table 5.1.	Example of opinion effect and structure effect	154
Table I M.1.	Manufacturing	155
Table I D.1.	Distributive trade	156
Table I S.1.	Other services	157

Cross-tabulation of selected characteristics:

Tables CT M.1.a.		
to CT M.1.d.	Manufacturing	164
Tables CT S.1.a.		
to CT S.1.c.	Other services	168

Sample size and response rate:

Table 7.1.a.	Response rate by sector	197
Table 7.1.b.	Response rate by Member State	198

Non-response rate:

Table 8.1.	Average percentage of item non-response	199
Table 8.2.	Results of the survey on non-respondents	200
Table 8.3.	Estimation of non-response bias	201

EUR Confidence intervals for manufacturing:

Tables 8.1.a.–CI M.1.	Single market's impact on your firm	204
Table CI M.2.	Single market's impact on your company's operations	207

Table CI M.3.a..	Single market's importance to development of strategy (sub table 1)	208
Table CI M 3.b.	Single market's importance to development of strategy (sub table 2)	209
Table CI M.4.	Any change in competition in the domestic market	210
Table CI M.5.	The extent to which the implementation of the SMP has affected	211
Table CI M.6.	Importance in changing unit costs	214
Table CI M.7.	Single market legislation as it affects your own firm or sector	213
EUR Confidence intervals for construction:		
Table CI C.1.	Single market's impact on your firm	214
Table CI C.2.	Single market's impact on your company's operations	215
Table CI C.3.	Single market's importance to development of strategy	216
Table CI C.4.	Any change in competition in the domestic market	217
Table CI C.5.	Single market legislation as it affects your own firm or sector	218
EUR Confidence intervals for the distributive trade:		
Table CI D.1.	Single market's impact on your firm	219
Table CI D.2.	Single market's impact on your company's operations	220
Table CI D.3.a.	Single market's importance to development of strategy (sub table 1)	221
Table CI D.3.b.	Single market's importance to development of strategy (sub table 2)	222
Table CI D.4.	Any change in competition in the domestic market	223
Table CI D.5.	Single market legislation as it affects your own firm or sector	224
EUR Confidence intervals for other services:		
Table CI S.1.	Single market's impact on your firm	225
Table CI S.2.	Single market's impact on your company's operations	226
Table CI S.3.a.	Single market's importance to development of strategy (sub table 1)	227
Table CI S.3.b.	Single market's importance to development of strategy (sub table 2)	228
Table CI S.4.	Any change in competition in the domestic market	229
Table CI S.5.	Single market legislation as it affects your own firm or sector	230
General information about businesses in Europe:		
Table 9.1.	Structure of European manufacturing sector by Member State, sector and size class (1992)	234
Table 9.2.	Structure of European construction sector by Member State and size class (1992)	235
Table 9.3.	Structure of European distributive trade sector by Member State, sector and size class (1992)	236
Table 9.4.	Structure of European other services by Member State, sector and size class (1992)	237

List of figures

Figure 6.1.	Multiple Correspondence Analysis (Manufacturing), Axes 1 & 2	161
Figure 6.2.	Multiple Correspondence Analysis (Manufacturing), Axes 1 & 3	162
Figure 6.3.	Multiple Correspondence Analysis (Manufacturing), Axes 2 & 3	163
Figure 6.4.	Correspondence Analysis (Manufacturing), Impact on firm's activities	172
Figure 6.5.	Correspondence Analysis (Manufacturing), Impact on firm's operations	174
Figure 6.6.	Correspondence Analysis (Manufacturing), Strategic importance	176
Figure 6.7.	Correspondence Analysis (Manufacturing), Changes in competition levels	178
Figure 6.8.	Correspondence Analysis (Manufacturing), Importance of costs	180
Figure 6.9.	Correspondence Analysis (Manufacturing), Legislation	182

List of abbreviations

DG15	Directorate-General for the Internal Market and Financial Services (DG XV)
ECU	European currency unit
EEC	European Economic Community
EU	European Union
EUR-12	12 Member States of the European Union before 1 January 1995
Eurostat	Statistical Office of the European Communities
NACE	General industrial classification of economic activities within the European Communities
NEC	Not elsewhere considered
NSI	National Statistical Institutes
NUTS	Nomenclature of territorial units for statistics (i.e. location by region)
SM	Single market
SME	Small and medium-sized enterprises (from 10 to 249 employees)
SMP	Single market programme
VAT	Value added tax (consumption tax)

Note that in the tables of this survey, the 12 Member States of the European Union (before 1 January 1995) are listed alphabetically using the spelling of the original language (corresponding names in English in facing column):

België/Belgique	Belgium
Danmark	Denmark
Deutschland (BR Deutschland)	Germany (Federal Republic of Germany)
Elláda	Greece
España	Spain
France	France
Ireland	(Ireland)
Italia	Italy
Luxembourg	Luxembourg
Nederland	Netherlands
Portugal	Portugal
United Kingdom	(United Kingdom)

Foreword

The single market is the backbone of European economic integration and the principal achievement to date of the European Community. Removal of all remaining non-tariff barriers, which has been at the very heart of the Union's legislative activity over recent years, was designed to open up markets to competition, thereby stimulating growth and improving competitiveness. Despite some delays in the adoption and transposition of the measures, the bulk of the legislative framework needed to make the single market work is now in place.

The time was therefore ripe to launch this first major survey of European business to assess the impact of the single market legislation on firms' strategies and operations, as well as their level of awareness of the opportunities presented by the single market. This exercise, which has been conducted with the help of the various National Statistical Institutes and some Economic Institutes, constituted a major input to the overall analysis of the effectiveness of the measures taken in creating the single market, which has been undertaken by the Commission in the context of Council Resolution 1218/92. The Single Market Review 1996 has been a major exercise in identifying the strengths and weaknesses of the functioning of the single market.

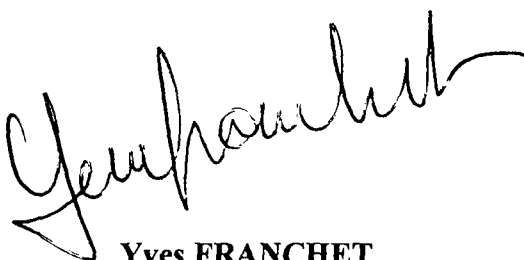
The first significant result achieved is the high level of response rate: more than 13,500 enterprises out of a total of some 24,000 replied to the survey (a 56% response rate), which confirms business interest in the single market. Overall results show that the single market programme, and in particular measures to remove customs formalities and eliminate delays at borders, has so far had a positive impact on European business even if a significant percentage of firms said they had not felt any impact. Although on the whole large firms benefited more from the single market than small businesses, the latter, which still operate mainly on local or national markets and are therefore not directly affected by the single market legislation, nevertheless gave an overall positive assessment of the SMP.

The manufacturing sector has expressed a greater degree of satisfaction *vis-à-vis* the SMP than the services sector. This confirms the view that while significant progress has been made in liberalization of some services sectors, especially traditional services, such as transport and financial services, barriers are still high in others.

More than three years after the symbolic starting date of 1 January 1993, business, however, considers that, although the SMP has largely succeeded in removing the main barriers to trade, it still far from having created a genuine internal market and that additional measures are therefore needed to achieve this objective. As recognized in the Commission's Confidence Pact on Employment, the single market is a key component of Europe's strategy to improve its competitiveness and create jobs. The results of this survey have contributed significantly to the 1996 Review of the Market and to setting the agenda for the future.



John MOGG
Director-General
Directorate-General for the Internal Market
and Financial Affairs (DG XV)



Yves FRANCHET
Director-General
Statistical Office of
the European Communities (Eurostat)

Acknowledgements

This survey has been carried out under the responsibility of:

Photis Nanopoulos, Director of Eurostat-Directorate D 'Business and energy statistics, research and development, and statistical methods' with Daniel Defays, Head of Unit Eurostat-D/3 'Research, development and statistical methods', Alexander Spachis, Deputy Head of Unit DG XV/A/1 'Operation of the internal market and economic analysis', and Pierre Buigues, Head of Unit DG II/B/3 'Evaluation of competition and research and development policies; internal market and industrial affairs, coordination of sectoral policies'.

It has been coordinated by Raoul Depoutot with the support of:

in Eurostat (processing of data, preparation of the publication): Mahammad Navid Anwar, Philippe Arondel, Jean-Yves Bienvenue, Asterios Hatziparadissis, Nicole Lehnertz, Edward Ojo, Mohamed Radjabou, Marina Van Mechelen;

in DG XV (definition of the scope of the survey, economic analysis of results): Jean-Yves Muylle, Patrick Roe, Lorna Windmill;

in DG II: John Sheehy.

In the Member States the national coordinators for data collection, codification and data capture have been:

<i>Belgium:</i>	Jean-Pierre Georges
<i>Denmark:</i>	Peter Boegh-Nielsen
<i>Germany:</i>	Wolfgang Ruppert
<i>Greece:</i>	Eleni Kapnissi
<i>Spain:</i>	Desiderio Aranda-Martín
<i>France:</i>	Vincent Thollon-Pommerol
<i>Ireland:</i>	Brendan Whelan
<i>Italy:</i>	Piero Taccini
<i>Luxembourg:</i>	Victor Molling, Arthur Tibesar
<i>The Netherlands:</i>	Henry Niewenhuijsen, Hans Posthumus
<i>Portugal:</i>	Maria Gois
<i>United Kingdom:</i>	Pamela Davies

1. Introduction

In December 1992, the Council of Ministers passed a resolution calling for a retrospective assessment of whether the single market programme (SMP) has achieved its objectives of removing non-tariff barriers to trade, investment and the free movement of persons in the European Union (EU). To this end, the European Commission undertook a series of 40 studies looking at progress in implementing the SMP, its effectiveness in removing non-tariff barriers and its impact in creating a genuine single market and improving economic performance and benefits for consumers.

Nineteen independent studies of manufacturing and service sectors were undertaken to identify whether the single market measures under review have led to the disappearance of barriers to free circulation and to identify any remaining obstacles to cross-border transactions.

Five independent 'barrier studies' aimed to assess progress in dismantling the most important non-tariff barriers (technical barriers, public procurement, customs and fiscal formalities, capital controls and industrial property protection).

Fifteen studies examined the economic impact of removing barriers; these studies dealt *inter alia* with trade and investment flows, price convergence, competition and competitiveness, employment and labour costs and economic cohesion.

A survey of 200 European trade associations' perceptions of the effects of the single market, was co-ordinated in the context of the Commission's 1995/96 Panorama of EU Industry.

Finally, this major business survey looked at the awareness of, and attitudes and reactions to, the SMP at company level. This exercise was conducted by the National Statistical Institutes, and other bodies specialized in statistics and economic analysis, and co-ordinated by the Statistical Office of the European Communities (Eurostat). The survey covered most manufacturing activities, construction and services. Twenty-four thousand firms, with more than 20 employees in the manufacturing sector and 5 employees in the services sector, were asked to rate the success of the SMP and its impact on their strategies and operations. More than 13,500 enterprises replied to this questionnaire, which represents a 56% response rate.

The next chapter of this publication provides an overall analysis of the main results of the survey. Subsequent chapters present the aggregate results for EUR-12 and the main unweighted results item by item.

2. Analysis of results

2.1. Introduction

This major survey was undertaken in the framework of the 1996 review to test the awareness, attitudes and reactions of European business to the SMP. A questionnaire was sent to approximately 24,000 enterprises in 12 Member States, asking them to rate the success of the single market in a number of areas, and its impact on their strategies and operations. Some 13,500 replies were received (a 56% response rate).

The survey was conducted mainly in the first half of 1995, i.e. at a time when some directives, in particular in the services sector, had just entered into force, thereby imposing a limit on the impact assessment. Moreover, only 11 Member States conducted a survey in the services sectors (EUR-12 minus Germany) and in the construction sector (EUR-12 minus Greece). The questionnaire covered a broad range of issues, such as the impact of the transitional VAT regime, the impact of the single market on marketing and distribution, the change experienced in competition on the basis of price or quality and the single market impact on banking and insurance costs. It was therefore designed to be answered by company executives with a horizontal view on their companies' operations.

This analysis serves as an introduction to the following more detailed results of the survey presented in the next chapters. While only a limited number of references will be made to concrete figures and tables, this chapter aims to provide an analysis of the results achieved and attempts, wherever possible, to explain them.

2.2. Business perception of the single market

2.2.1. The single market has been successful in removing barriers to trade...

European businesses largely agree that the SMP has achieved its main objective, i.e. to remove obstacles to trade and create a barrier-free market. In particular, manufacturing firms, which previously had to operate in fragmented markets, given the co-existence of many physical and technical barriers to trade, perceived much more of an SMP effect in removing barriers than other sectors. Some 41% of manufacturing companies consider that obstacles to EU trade have been eliminated in their sector. Only 22% of companies consider that the SMP had been a success in removing barriers in the services sector, where physical obstacles were somewhat less present than in the manufacturing sector. However, the percentage of firms considering that the SMP had failed to remove barriers does not substantially differ between manufacturing and services and ranges from 17% to 22% (size-weighted results¹).

Firms in sectors which were previously quite heavily regulated and suffered from market fragmentation, like food and drink and electrical machinery, have been more sensitive to the removal of trade barriers, while firms in the wood and paper, transport equipment, non-metallic and mineral products industries were more cautious in their assessment.

¹ Salaried employees working in firms having responded expressed as a percentage of the total number of employees working in the firms having responded to the survey.

Transport services have also been fairly positive, although 50% of transport companies responded they had no opinion on the issue. This is not so surprising, given the small share of international transport in total demand and the dominance of the sector by very small companies. Distribution expressed an overall positive assessment with twice as many firms agreeing as disagreeing that the SMP had removed barriers. The fact that the distribution sector is still largely operating on a regional/national basis may help to explain the very high rates of firms having no opinion on the matter.

Table 2.1. The SMP has been successful in eliminating obstacles to EU trade in your sector

Classification	Agree	No opinion	Disagree
MANUFACTURING	41	39	20
of which			
Electrical and optical machinery	51	30	19
Food, beverages and tobacco	46	36	18
Machinery and equipment NEC	43	35	21
Chemicals, rubber and plastics	41	39	20
Wood, paper and printing/publishing	33	48	19
Transport equipment	31	38	30
CONSTRUCTION	24	56	19
DISTRIBUTIVE TRADE	27	59	14
of which			
Wholesaling and motor vehicles	29	54	17
Retail trade	25	63	11
SERVICES	22	65	13
of which			
Transport, storage and communication	37	50	13
Financial intermediation	29	53	18

Source: Eurostat.

Manufacturing firms in the southern countries and Ireland, with positive opinions equal to or in excess of, 50%, are much more positive in their assessment of the SMP's impact, while firms established in Belgium, the Netherlands and the UK, especially small firms, appeared mainly indifferent on the matter. This apparent dichotomy between peripheral Member States and the core regions is mirrored by the results of the effectiveness of measures aimed at abolishing customs formalities and simplifying VAT operations (see Section 2.3). Individual country results are somewhat similar in the services sector, except for Portugal, which has a much less positive attitude, and for Luxembourg, which has much more positive assessment; this can probably be explained by the overall positive opinion expressed by financial services firms.

2.2.2. ... and is considered by firms to have had some impact on their performance

While firms generally accept that the SMP has been successful in removing barriers to trade, they are more reluctant to admit that it has been successful for their activities. The manufacturing sector is the only sector where firms have a clear overall positive opinion of the impact of the SMP on them. Opinions in the services and distribution sectors are slightly less positive, while in the construction sector firms disagree with any successful single market impact.

Italian and Irish companies, and Greek and Spanish large firms in the manufacturing sectors, are very positive, with 50 to 65% of firms, expressed in terms of employees, having perceived a successful impact from the SMP on their operations. A majority of Italian and Greek firms in the services sector express the same opinion. On the other hand, Portuguese firms display overall negative results as regards the SMP's impact on their operations. Firms in Belgium and the Netherlands, which have long been very open economies, did not notice any significant impact of the SMP (between 60 and 70% of firms having no opinion, depending on the sector).

A general trend in the responses is that large and very large firms have felt the SMP impact more positively, both in the manufacturing and services sectors (with respectively 46 and 35% of firms with more than 1,000 employees agreeing that the SMP had been a success for them). The impact on SMEs, however, is less pronounced but, nevertheless, still quite positive in the manufacturing sector. This could be explained by the high number of SMEs not yet involved in cross-border operations, for which single market measures are not particularly relevant. The transport equipment sector illustrates this discrepancy between small and large firms: while only 27% of firms have felt a positive SMP impact (with 52% having no opinion), this percentage increases to 47% when expressed in number of employees (with only 28% having no opinion).

Table 2.2. The SMP has been a success for your firm

Size class	Manufacturing sector			Service sector			Distributive trade		
	Agree	No opinion	Disagree	Agree	No opinion	Disagree	Agree	No opinion	Disagree
20-49	30	42	28	16	63	21	18	59	23
50-199	36	37	27	18	61	21	26	49	25
200-499	40	35	25	17	61	22	26	51	24
500-999	38	38	24	21	54	25	20	50	30
≥1,000	46	31	23	35	46	19	26	60	14
EUR-12	33	40	27	16	63	21	18	58	23

Source: Eurostat.

Firms, in particular large firms from high-tech industries, such as the chemical, equipment and machinery and electrical industry, have mostly benefited from the SMP, and more specifically from technical harmonization and mutual recognition measures. An overall negative assessment of the impact of the SMP on firms' activities seems to prevail in the wood and paper, construction and distributive trade sectors. This could be explained by the lack of specific measures for these sectors, on which the impact of the SMP has been much more indirect than direct, and therefore of a less visible nature than for other sectors, such as 'high-tech' industries.

2.2.3. ... but a limited impact on sector performances

When asked whether the SMP had been a success for their sector (either at national or European level), individual firms' perceptions appear rather mitigated. The overall assessment of the impact on sectors at national level, which had to face stronger competition, is rather

negative. Manufacturing firms consider, however, that the SMP has been rather successful for their sector at European level, while the services sector has a more balanced view.

Looking at sectors' reactions, one can clearly distinguish between sectors with strong internationalization and sectors more traditionally anchored at regional and national levels. Manufacturing firms consider that the SMP has been more successful for their sector at EU than at national level, while in the services sector, firms consider that the SMP has been equally successful for their sectors at national and EU levels. Most of the firms in the electrical machinery and equipment sectors are convinced the SMP has been beneficial for their sector (at EU and national levels), which confirms the sectoral analysis made in Section 2.2. In the services sector, firms in the financial intermediation and transport sectors also acknowledge beneficial effects on their sectors, although they do not make much distinction between the national and EU levels.

Table 2.3. The SMP as it affects your sector, at national and EU levels

Classification	The SMP has been a success for your sector in your country			The SMP has been a success for your sector in the EU		
	Agree	No opinion	Disagree	Agree	No opinion	Disagree
MANUFACTURING	25	44	31	29	51	20
Electrical and optical machinery	35	36	29	41	40	19
Machinery and equipment	27	48	26	32	45	23
Non-metallic mineral products	28	49	23	30	56	14
Textiles, leather and furniture	26	41	33	31	47	22
Food, beverages and tobacco	25	39	36	30	51	19
Chemicals, rubber and plastics	26	43	31	27	52	20
SERVICES	16	62	22	15	71	14
Financial intermediation	22	58	20	27	57	17
Transport, storage and communications	21	52	27	21	60	19
DISTRIBUTIVE TRADE	19	59	23	16	68	15
CONSTRUCTION	20	47	33	13	60	27

Source: Eurostat.

Small companies, which have a more local and regional market, generally consider that the SMP has been equally beneficial for their sector at national and EU levels, while companies with more than 50 employees generally consider that it has been more successful at EU level. As a general rule, Italian and Greek companies are the ones which have most noticed the SMP impact on their sector. French, Portuguese and Luxembourg companies, especially in the distributive trade sector, have an overall negative assessment of the SMP impact on their sector at national and European levels. In some cases, this can be explained by the fierce competition which was experienced in those countries, as is confirmed by the very high rate of Luxembourg distributive trade firms which experienced an increase in competition from other EU companies.

2.3. Analysis of the effectiveness of the main SMP measures

Individual SMP measures seem to have had an overall positive impact on European firms in all sectors, even though in most cases a high percentage of firms was unable to assess the impact or identify the measures concerned. In general, more firms perceive a positive impact from individual measures (ranging from 10 to 60%) than a negative one (ranging from 1.5 to 9.3%). Italy, Greece and, to a lesser extent, Ireland are more positive in their assessment, while the Benelux countries, which have been very open economies for decades, notice a less positive impact. British firms seem to have been rather indifferent, with very high rates of 'neutral' responses, which in some cases can be explained by the relatively high levels of market liberalization already achieved there.

Very large companies perceive the positive consequences of the SMP more keenly than smaller firms. This is also confirmed by the higher size-weighted results achieved. Sectors which benefited from measures more specifically tailored to their own needs, like most of the 'non-traditional' manufacturing sectors and transport services, experience more impact, while other services and distributive trade were affected more indirectly and therefore in a less tangible way. In the manufacturing sector, a general feature is that sectors with a high technological content, such as chemicals, electronics and machinery have been more affected by SMP measures, either in a positive or negative way, while sectors with a lower technological content were less affected (wood and paper, textiles) or had no opinion (non-metallic industries).

In order to assess the effectiveness of the SMP, a careful look should be taken at the impact of individual measures designed to deal with the removal of barriers within the single market. Measures aimed at removing physical barriers to trade had a positive impact for a very significant number of enterprises, as did measures aimed at technical harmonization and mutual recognition, deregulation of freight transport for the manufacturing sector, and liberalization of capital movement for the services sector.

Table 3.1. Impact of single market measures on firms in the manufacturing sector

Category of measures	Percentage of enterprises expressing opinion			
	Positive impact	No impact	Negative impact	Don't know
The elimination of customs documentation	60	30	5	5
The elimination of delays at frontiers	56	35	2	7
Deregulation of freight transport	43	43	3	12
Harmonization of technical regulations/standards	31	51	9	9
The change in VAT procedures for intra-EU sales	32	41	15	11

Source: Eurostat.

Table 3.2. Impact of single market measures on firms in the services sector

Category of measures	Percentage of firms expressing opinion			
	Positive impact	No impact	Negative impact	Don't know
Measures to facilitate cross-border operations into other EU states	22	65	3	10
Liberalization of capital movements	16	72	1	10
Recognition of licences/authorizations in other EU states	12	72	4	13
Measures to facilitate physical establishment in other EU states	9	77	1	13

Source: Eurostat.

2.3.1. Removal of physical barriers to trade

This covers measures aimed at eliminating customs documentation and delays at the frontiers, which mainly affect the manufacturing sector, as well as measures aimed at facilitating cross-border operations and physical establishment for the services sector. It should not come as a surprise that these measures have had a positive impact on a very significant number of enterprises. Indeed, some 60% of manufacturing enterprises experienced a positive impact from the elimination of customs documentation, while only 5% were negatively affected. Comparable figures exist for the elimination of delays at borders. Most of the firms in peripheral countries (Ireland, Greece and Denmark) benefited from the elimination of customs procedures, while Luxembourg experienced a surprisingly high percentage of firms having been negatively affected by this removal (which probably represents customs agents and other intermediaries). UK companies remain largely indifferent to the removal of physical barriers to trade; around 55% of them declared elimination of delays and formalities had had no impact whatsoever on their activities.

Large firms, which are usually most inconvenienced by export formalities, reacted very positively to these measures, whereas smaller firms were less keen to report a positive impact. This tendency appears in all Member States, with size-weighted results always outweighing unweighted results. These measures also seem to be universally appreciated across sectors, with the non-metallic and mineral products industry having been the least sensitive to the removal of physical barriers.

In the services sector, measures designed to facilitate cross-border operations were also the most positively perceived by enterprises, especially by the transport services sector and the wholesale business. However, more than half of the firms acknowledged that these measures had had no impact on them. A majority of Greek and Spanish firms felt a positive impact, while very few Danish and UK firms did. A significant number of French and Luxembourg firms even felt some negative impact from measures aimed at facilitating cross-border operations in the distributive trade sector.

Measures aimed at facilitating physical establishment in other countries have been very differently appreciated across countries. They were said to have been positive for more than 40% of Danish companies and 30% of Greek companies, but only for 4% and 5% of UK and Dutch firms respectively (EU average: 9%). Large companies, in particular in the financial

intermediation sector, also experienced a much more positive impact than small firms. However, almost no company reported having been negatively affected by such measures.

2.3.2. Removal of technical barriers to trade

This covers measures aimed at harmonizing technical regulations/standards (manufacturing) and licensing/authorization requirements (services), mutual recognition of technical regulations/standards and of licences/authorizations in other EU states (services), conformity assessment procedures and simplified patenting procedures (manufacturing).

Technical harmonization measures and mutual recognition had an overall positive impact on manufacturing enterprises; almost four times as many companies were positively affected than negatively. The application of the mutual recognition principle is rated more highly than EU efforts to eliminate technical barriers through legislative harmonization.

High-tech industries, such as the chemical, machinery and electrical machinery sectors, experienced a much more positive impact (even though a significant number of machinery and equipment firms felt a negative impact from these procedures, which can be partly explained by high, transitional costs of compliance with technical standards or regulations). Overall, sectors did not notice any major difference in the effectiveness of harmonization measures and mutual recognition, for which results are almost equal.

Table 3.3. Impact of single market measures aimed at removing technical barriers

	Harmonization of technical regulations and/or standards				Mutual recognition of technical regulations and/or standards				Conformity assessment procedures			
	Posit. impact	No impact	Negat. impact	Don't know	Posit. impact	No impact	Negat. impact	Don't know	Posit. impact	No impact	Negat. impact	Don't know
Food, beverages and tobacco	35	44	9	12	30	48	8	15	24	52	6	19
Machinery and equipment	45	29	20	5	43	37	11	9	32	50	6	12
Electrical and optical machinery	36	48	9	6	50	36	6	8	31	52	8	9
Chemicals, rubber and plastics	33	47	10	10	35	49	7	10	27	53	6	14
Transport equipment	30	56	11	4	49	39	7	5	24	47	5	24
EUR-12	31	51	9	9	32	49	7	12	23	56	5	15

Source: Eurostat.

Greek and Irish companies, especially large companies, benefited most from these changes, while the Benelux countries had a more neutral experience, with more than 10% of Luxembourg and German companies negatively affected by these measures. Fifty percent of very large companies felt a positive impact on their activities.

Conformity assessment procedures appeared to have been less important for companies, more than half considering that they had no impact on them. The positive impact, which significantly predominates among companies having an opinion, is more apparent in high-tech sectors and in Mediterranean countries, with the exception of Greece where 36% of firms did not know the impact that conformity assessment procedures may have had on them (15% at EU average).

Globally speaking, the same considerations apply when looking at the effect of simplified patenting procedures, with 85% of firms being indifferent on this issue. This very high rate may be partly due to the high proportion of SMEs in the sample, because size-weighted results tend to be much more positive than unweighted results, particularly in the chemical (34%), transport (32%) and machinery equipment (30%) sectors, for which protection of intellectual property rights is of greater strategic importance. This major divergence between the views of small and large companies (9% versus 36% of companies having felt a positive impact) can be explained by the very small proportion of small businesses concerned with obtaining EU-wide protection of patents and trademarks.

Around 80% of firms in the services sector had no strong feeling about the impact of harmonization or recognition of licensing/authorization requirements, because an important proportion of them were not directly affected by these measures. As expected, however, the net balance was more positive for the transport and financial intermediation sectors. Moreover, while in most countries the net impact appears to have been positive, Italian firms in the services sector appear to have been negatively affected by the harmonization of licensing/authorization requirements. This may be explained by the overall negative assessment from the hotel and restaurant sectors.

Removal of fiscal barriers

Changes in VAT procedures and measures designed to get rid of some forms of double taxation are considered here.

The transitional VAT system has given rise to quite controversial reactions since its implementation in 1993. While twice as many companies agreed that it had had a more positive impact than a negative one, 41% considered it had had no impact at all. While there is no major differentiation of the results across sectors, results vary quite substantially across countries with Greek, Irish, Danish and the large Portuguese companies much more positive about it, while large companies in France, Germany and the Netherlands were more critical.

One interesting feature is the more positive impact the transitional VAT regime has had on small firms, as compared to large firms. This is a departure from the general trend according to which the impact of individual measures has been greater on large firms than on the very small ones. In particular, a substantial number of large firms felt a negative impact from the change in VAT regime, which could be explained by the lack of a single, uniform regime across the EU which particularly affects companies which operate in many different countries.

Table 3.4. Impact on firms of the change in VAT procedures for intra-EU sales

	Percentage of firms expressing opinion			
	Positive impact	No impact	Negative impact	Don't know
20-49	32	44	12	13
50-199	33	39	20	8
200-499	35	35	21	8
500-999	29	35	28	8
≥ 1,000	30	33	23	14
EUR-12	32	41	15	11

Source: Eurostat.

The few provisions aimed at tackling double taxation problems appear to have had an overall positive impact, even though between 80 and 90% of responding firms adopted a 'neutral' position in this respect. This can be explained by the fact that only companies having subsidiaries or permanent establishments in other EU Member States were affected by these measures. The impact has therefore been much greater for large companies, which quite often have subsidiaries in other Member States and are therefore much more affected by the directives adopted at EU level. The financial intermediation sector, and the chemical and mineral products sectors, with a strong proportion of multinationals, have also been more positively affected.

Flanking measures

These include measures to liberalize capital movements, open up public procurement and to liberalize of freight transport.

The liberalization of freight transport was the most successful measure as it had a positive impact on some 43% of European manufacturing firms, with a peak of 69% of firms in the two most peripheral countries, Greece and Ireland. Countries located in the inner core of the Union were much less affected by this liberalization, while firms in the periphery benefited much more from it, for obvious reasons. 'Heavy' sectors, for which transport costs are an important component, were also much more receptive to the gains from freight transport liberalization, as were very large companies, with 57% of them having been positively affected.

Liberalization of capital movements had a strong, positive impact on firms in Greece, Spain and Italy (except for the distributive trades in Italy) which all had severe restrictions to capital movements before the SMP was put in place, while a substantial negative impact was perceived almost nowhere. The financial intermediation sector benefited quite substantially with 49% of firms (size-weighted results) having felt a positive impact, while the property and business activities were largely not affected (77% experienced no impact). No significant impact has been noticed on the distributive trades sector, except in Greece where liberalization measures had a positive impact for 55% of firms.

Finally, the opening-up of public procurement appears to have been the least effective SMP measure which companies had to assess in this survey. A very small percentage of enterprises considered it had had an impact on them, with a neutral response for some 90% of enterprises. Spain and Greece were the countries where a positive impact has been more apparent, while

Dutch manufacturing and Luxembourg services companies had mostly perceived a negative impact. The construction sector, which is quite affected by these measures, recorded a mostly negative impact, while other sectors recorded a fairly positive net impact. This relative failure seems to be the main reason for the overall negative assessment of firms as to the overall impact of the SMP because 67% and 76% of them disagreed that the SMP had been a success for them and their national sector respectively.

2.4. The SM and the competition level on the domestic market – effects in terms of costs

Through the elimination of trade barriers and the creation of a larger single market, one goal of the SMP was to stimulate competition and encourage enterprises to lower their production costs. A first section will provide evidence, on the basis of the survey, of an increase in the EU competition level. A second section will emphasize how the SMP has impacted upon European enterprises' average unit costs.

2.4.1. Increase in the competition level

One of the most visible consequences of the single market has been a marked increase in the competition level in recent years, especially from domestic and other EU firms. This was most apparent on the basis of price.

Firms in the manufacturing sector have been more confronted to increased competitive pressures than firms in the services sector. In the manufacturing sector, the single market has mainly led to an overall increase in the number of competitors from other EU Member States. Small businesses, in particular, faced increased price competition from national competitors, while large firms faced it from other European firms; increased competition from non-European firms was mainly experienced by large companies.

In the services sector, the single market was mainly felt to have increased competition from domestically owned firms, both in terms of the number of competitors, price and quality. In addition, a marked distinction emerged between small and large firms, the latter having noticed twice as much increase in competition as small businesses. Finally, a very small number of firms overall considered that the single market had brought about a decrease in competition.

Table 4.1. Change in competition level on the domestic market in recent years

Classification	Manufacturing			Services		
	Increase	No change	Decrease	Increase	No change	Decrease
<i>No. of competitors</i>						
Domestic firms	25	64	11	30	63	7
Other EU-owned firms	39	59	2	21	77	2
Non-EU-owned firms	25	74	2	9	88	2
<i>Price-competition</i>						
Domestic firms	44	51	42	37	60	3
Other EU-owned firms	41	55	4	16	81	3
Non-EU-owned firms	29	67	4	9	87	3
<i>Quality competition</i>						
Domestic firms	33	64	3	27	69	4
Other EU-owned firms	29	69	2	14	83	3
Non-EU-owned firms	18	79	3	8	89	3

Source: Eurostat.

Firms in the transport equipment, and food and beverages sectors have been subjected to an overall increase in competition from national and other EU firms, while firms producing non-metallic mineral products apparently did not face a significant increase in competition. The electrical and machinery and textile sectors also faced quite a significant increase in competition from non-EU firms. In services, the financial intermediation sector reported well above average perception of increased competition from other EU Member States, while transport services and property and business activity experienced increased competition from domestic competitors.

Table 4.2. Increase in competition level on the domestic market on the basis of price in recent years. Percentages

Classification	Domestic enterprise	Other EU enterprises	Non-EU enterprises
Manufacturing			
EUR-12	44	41	29
Food, beverages and tobacco	54	45	20
Transport equipment	50	51	32
Textiles, leather and furniture	43	36	35
Electrical and optical machinery	37	40	43
Non-metallic mineral products	44	32	16
Services			
EUR-11	37	16	9
Financial intermediation	6	26	34
Transport	42	29	15
Distribution	38	29	11
Property and business activities	43	17	11

Source: Eurostat.

The increasingly competitive environment, which resulted from the SMP, has been mainly felt by firms from peripheral countries. In particular, Irish, Spanish and Greek enterprises across sectors noticed the most significant increase in competition from domestic and other EU competitors. German and French manufacturing enterprises were most exposed to an increase in competition from non-EU enterprises due to the SMP. Overall results also point to the relatively low Italian and UK business perceptions of increased competition.

2.4.2. Effects on unit costs

Only the manufacturing sector was questioned on the SMP's effects on average unit costs. The majority of manufacturing firms perceive the implementation of the SMP as not having affected their unit costs. However, size-weighted results indicate that when businesses felt an impact, average unit cost decreases prevailed over cost increases. This is even more the case the larger the companies are, therefore suggesting that large firms benefited most from economies of scale to reduce their costs.

The transport equipment industry and the electrical and optical machinery sectors experienced significant unit cost decreases while most of the other sectors experienced around average cost decreases. Firms, especially small ones, in the machinery and equipment sectors, experienced surprisingly high average cost increases, which could be explained by high one-off costs to comply with the requirements imposed by the new technical harmonization measures.

Greek and Irish firms reported above average decreasing unit costs. On the other hand, one among four Spanish and Italian firms experienced unit cost increases. The results indicate that larger firms perceive a reduction in unit costs more frequently than smaller firms. The survey also suggests that the smallest firms (20 to 49 employees) have seen more of an increase in their average unit costs than a decrease.

Table 4.3. Impact of the SMP on enterprises' unit costs by size. Manufacturing sector. Percentages

	Decrease	No change	Increase
EUR-12	15	53	14
More than 1,000 employees	26	55	7
200 to 499 employees	21	53	8
500 to 999 employees	22	57	9
50 to 199 employees	16	56	13
20 to 49 employees	12	51	17

Source: Eurostat.

The survey suggests that, where changes in unit costs have taken place, they were mainly due to decreasing costs of raw materials, more efficient production processes and reduced distribution costs. This is because these factors are major determinants of average unit costs and moreover were directly influenced by the abolition of physical border controls which has had the greatest impact on manufacturing firms. Banking and insurance costs have, where applicable, contributed least to changing firms' unit costs.

Table 4.4. Changes in unit costs. Importance of the measures contributing to the changes. Manufacturing sector. Weighted by number of employees. Percentages

	Important ¹	Little or no importance	Don't know
Costs of raw materials	30	26	44
Production process	24	32	44
Distribution costs	24	32	44
Testing and certification	21	35	44
Marketing costs	16	40	44
Banking costs	14	42	44
Insurance costs	11	45	44
Other cost sources	5	28	67

¹ Sum of 'very important' and 'quite important'.

Source: Eurostat.

2.5. The impact of the SMP on the enterprises and their business strategy

The creation of a barrier-free environment was thought to have major implications for businesses' operations and the development of their strategies. Results indicate, however, that the SMP has so far had a limited impact on both areas. A first section reviews the SMP's impact on enterprises' operations, thus providing strong evidence of the favourable impact of the single market on cross-border EU trade. The second section focuses on the SMP's contribution to the development of European corporate strategies, with particular emphasis on the subsequent increase in purchases of raw materials from other EU countries.

2.5.1. Effects on firms' operations

When asked about the single market impact on their operations, European business appeared rather sceptical as some 60 to 84% of firms actually perceived no impact at all on their operations. Cross-border sales have been boosted for some 30% of the manufacturing sector which also experienced a net negative impact on their sales to the domestic market. The effect on profitability has been neutral, while the overall impact on employment appears to have been rather negative in the manufacturing sector and slightly positive in the services sector.

Table 5.1. The effect of the SMP on enterprises' operations. Manufacturing and service sectors. Weighted by number of employees. Percentages

Classification	Positive impact	No change	Negative impact
Manufacturing:			
- sales to other EU markets	30	60	4
- productivity	14	76	3
- profitability	14	67	13
- sales to the domestic market	10	70	15
- employment	9	73	13
- sales to non-EU markets	8	82	3
Services:			
- sales to other EU markets	19	72	2
- productivity	14	77	4
- sales to the domestic market	14	71	9
- profitability	14	71	10
- employment	11	76	8
- sales to non-EU markets	7	84	1

Source: Eurostat.

The single market impact on cross-border sales seems to have been noticed more in 'traditional' sectors such as food and beverages, and textiles, while high-tech manufacturing sectors display around average results. In the services sector, firms, and particularly large firms, in the financial intermediation and transport sectors benefited most from the single market impact on their cross-border businesses. Large enterprises in financial intermediation seem to have placed an enormous weight on assessing the positive effect of the single market on cross-border sales, thus converting the lowest figure when weighted by number of firms (7%) into the highest size-weighted result (24%).

Cross-border sales is also the only activity where large firms perceived a more positive impact than small firms. It is striking to note that for areas such as productivity, profitability and employment, small firms felt a more significant impact than larger firms. This partly contradicts the overall assessment of the single market success reported in Chapter 2.

Table 5.2. The effect of the SMP on sales to other EU countries. Weighted by number of employees. Percentages

Classification	Positive impact	No impact	Negative impact
MANUFACTURING			
Food, beverages and tobacco	38	54	4
Textiles, leather and furniture	35	55	4
EUR-12	30	60	4
Transport equipment	25	66	5
Chemicals, rubber and plastics	22	68	4
SERVICES			
Financial intermediation	24	67	1
EUR-11	19	72	2
Hotels and restaurants	15	76	1
Distributive trade	12	75	2
Construction	11	71	3

Source: Eurostat.

Irish and southern European firms are much more positive in assessing the SMP's impact on EU sales than companies located in the UK, Germany, France, Belgium and Luxembourg. Spanish and Italian firms in the manufacturing sector, and Greek enterprises in the services sector, have a well above average positive perception of the SMP impact on intra-EU sales. However, there seem to be significant differences in the size of firms which reported positively from these countries: while mainly large firms displayed a positive impact on cross-border trade in Portugal and Greece, there were more small firms reporting a positive impact in Ireland.

2.5.2. Importance to the development of enterprises' strategy

An assessment of the single market impact on business strategy reveals that at a very aggregate level, the SMP has been more important to product-related strategies than production and acquisition related strategies. In the manufacturing industry, the SMP was considered as having been more important in promoting purchases of raw materials from other EU markets, with some 42% of the manufacturing sector perceiving the SMP as either very important or quite important in that respect. Other strategic operations where the SMP has also been of some importance include pricing, penetration of EU markets, and research and development of new products. The SMP is perceived as being relatively less important to the purchase of business and financial services from other EU markets.

Table 5.3. The importance of the SMP to the development of the firms' strategy in recent years. Manufacturing sector. Weighted by number of employees. Percentages

	Important ¹	Little or no importance	Don't know
Purchase of raw materials from other EU markets	42	45	13
Pricing	37	48	15
Penetration of EU markets	37	46	17
Research and development of new products	36	47	17
More specialized products	30	52	18
Distribution networks in other EU markets	30	49	21
Pan-European labelling and packaging	30	48	22
Co-operation agreements with other companies	18	47	35
Establishment of production plants in other EU countries	16	54	30
Direct investment in other companies	16	50	34
Purchase of financial services from other EU markets	12	62	26

¹ Sum of 'very important' and 'quite important'.

Source: Eurostat.

The main impact of the SMP in the services sector has also been felt on product-related strategies: more specialized services and development of new products and services as well as competitive pricing, were clearly identified as being the operations where the SMP had the most significant impact. This is a common feature with the manufacturing sector. However, the SMP was also perceived as having been relatively less important than in the manufacturing sector so far as cross-border sourcing, such as purchase of business and financial services from other EU markets, is concerned.

Table 5.4. The importance of the SMP to the development of the firms' strategy in recent years. Services sector. Weighted by number of employees. Percentages

	Important ¹	Little or no importance	Don't know
Development of new products/services	31	38	31
More specialized products/services	29	37	34
Pricing	29	39	32
Efficiency in the provision of products/services	29	37	34
Increase in cross-border provision of services	23	39	38
Establishment of operations in other EU states	19	40	41
Direct investment in other companies	16	39	45
Purchase of financial services from other EU markets	10	46	44

¹ Sum of 'very important' and 'quite important'.

Source: Eurostat.

A general feature is that for both manufacturing and services sectors, sectoral deviations from the mean are relatively small, which indicates some degree of homogeneity in the way the single market has influenced business strategy across sectors. Globally speaking, the chemical industry, the machinery and equipment sector and electrical and optical machinery were the manufacturing sectors which recorded above-average perceptions of the single market impact on their business strategy.

The transport and communications services sectors were also significantly influenced. The distributive trade and construction sectors generally find the SMP of less importance to the development of their strategies, when compared with manufacturing and the services sector. Table 5.5 reviews the importance of the SMP on research and development of new products/services in recent years at the sectoral level. The SMP is perceived as being more important to the research and development of new products/services in high-tech sectors, like machinery and equipment NEC industries, and electrical and optical machinery, as well as in the financial intermediation and transport sectors.

Table 5.5. The importance of the SMP on research and development of new products/services in recent years at the sectoral level. All sectors. Weighted by number of employees. Percentages

	Important ¹
Machinery and equipment NEC	47
Electrical and optical machinery	45
Financial intermediation	38
Transport, storage and communication	37
EUR-12 - Manufacturing	36
Metals and metal products	33
EUR-11 - Services	31
Construction	23
Wood, paper and printing/publishing	22
Hotels and restaurants	21
Distributive trade	19

¹ Sum of 'very important' and 'quite important'.

Source: Eurostat.

Generally speaking, it appears that larger firms have been more capable of and keener on integrating a single market dimension in their strategies and reorienting them to encompass all the opportunities offered by a larger, barrier-free market. This is even more apparent in operations like product standardization, leaner production methods, improved distribution networks and pan-European labelling and packaging. This may be due to higher levels of awareness of the many single market opportunities among large companies, while small firms tend to have a higher level of ignorance of the possible impact single market measures may have on their operations and strategies.

2.6. Conclusions

The SMP seems to have met its basic objectives for a significant percentage of enterprises, but for another part of enterprises it has not yet led to a genuine single market. One in four manufacturing firms believes that the SMP has succeeded in that, while one in three disagrees with such a statement. Germany is the only country where more firms agree than disagree that a genuine single market has been put in place thanks to the SMP. Sectoral and size breakdowns do not show significant variations. Firms in the services sector are even less convinced that a genuine market is now in place, with a very low percentage (6%) having a favourable opinion on the matter. The distributive sector shares the same opinion.

Quite naturally therefore, firms believe that additional measures are needed both to eliminate obstacles to EU trade and create a genuine single market. About one in four manufacturing firms believes it, while the percentage is somewhat smaller in the services and distributive trade sectors. Transport equipment, food and beverages, and transport services are the sectors where there seems to be significant demand for additional measures. Across sectors, Italian firms most demand the elimination of obstacles to trade so as to create a genuine single market. This result is to be seen against the background of the generally very high percentage of Italian firms considering that the single market had been a success for them and their sector.

3. Aggregate results for EUR-12

Aggregate results for each sector are shown hereafter: Manufacturing, Construction, Distributive Trade, Other Services.

Note that for Construction, results are available for the former EUR-11 (EUR-12 excluding Greece). Furthermore, since some countries used for this sector the questionnaire intended for Manufacturing and others used the questionnaire for Services, only characteristics common to both have been kept in the report.

For 'Other Services', results are available for EUR-11 (EUR-12 excluding Germany).

The definition of EUR-11, used here for convenience, may change from table to table. However, definitions of the aggregate EUR-11, EUR-10 or EUR-8 are given at the bottom of every table where these abbreviations are used.

3.1. Manufacturing sectors

Table EUR M.1. Single market's impact on your firm

Category	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees				Percentage of turnover of enterprises expressing opinion			
	Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know
Harmonization of technical regulations and/or standards	31	51	9	9	40	45	8	8	41	44	8	8
Mutual recognition of technical regulations and/or standards	32	49	7	12	40	45	5	10	40	45	5	10
Conformity assessment procedures	23	56	5	15	27	55	4	13	28	54	4	14
Simplified patenting procedures	13	64	2	21	24	57	1	18	25	57	1	17
The opening-up of public procurement	9	71	4	16	13	68	5	13	13	69	4	13
The elimination of customs documentation	60	30	5	5	69	23	5	3	69	22	5	3
Deregulation of freight transport	43	43	3	12	50	38	2	10	51	37	2	10
The elimination of delays at frontiers	56	35	2	7	63	31	1	5	63	31	1	5
The change in VAT procedures for intra-EU sales	32	41	15	11	32	37	21	11	31	36	22	11
The liberation of capital movements	23	61	2	14	29	58	1	12	29	58	1	12
Double-taxation agreements	17	60	2	21	25	55	1	19	25	54	1	19

Source: Eurostat.

Table EUR M.2. Single market's impact on your company's operations

Category	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees				Percentage of turnover of enterprises expressing opinion			
	Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know
Sales to the domestic market	13	67	15	5	10	70	15	4	10	71	15	4
Sales to other EU countries	28	61	4	6	30	60	4	5	31	60	4	5
Sales to non-EU countries	9	78	3	9	8	82	3	8	8	82	3	7
Productivity	16	74	4	6	14	76	3	7	14	77	3	6
Profitability	16	66	12	6	14	67	13	6	14	67	13	7
Employment	12	73	10	5	9	73	13	5	8	74	13	5

Source: Eurostat.

Table EUR M.3. Single market's importance to development of strategy

Category	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees				Percentage of turnover of enterprises expressing opinion			
	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know
Products standardization	10	19	47	25	11	23	48	18	11	24	48	16
Products specialization	11	20	45	24	9	21	52	18	9	21	53	17
Pricing	12	24	43	21	12	25	48	15	12	25	49	14
Research and development of new products	11	23	43	23	12	24	47	17	12	24	48	16
Capacity of existing national production	8	20	47	25	9	22	50	18	9	23	50	18
Number of existing production plants	4	10	51	36	4	11	57	27	5	11	58	26
Establishment of plants in other EU states	2	7	50	40	4	12	54	30	5	13	54	29
Lean production methods	6	16	45	34	10	22	44	24	10	22	43	24
Penetration of markets in other EU states	10	22	43	25	11	26	46	17	11	26	46	16
Advertising in other EU states	4	15	51	29	5	18	55	22	5	18	56	21
Distribution networks in other EU markets	6	16	49	29	8	22	49	21	8	22	50	20
Pan-European labelling	6	16	47	30	9	21	48	22	10	22	47	21
Purchase of raw materials from other EU markets	10	24	48	19	11	31	45	13	11	31	45	13
Purchase of components from other EU markets	7	18	52	24	8	25	51	16	8	25	51	16
Purchase of business services from other EU markets	2	7	60	31	2	11	65	22	3	12	65	20
Purchase of financial services from other EU markets	1	6	58	35	2	10	62	25	2	11	63	25
(Direct) Investment in other companies	2	7	48	43	4	12	50	34	5	12	50	33
(Direct) Investment from other companies	2	6	49	44	2	7	54	37	3	7	55	36
Co-operation agreements with other companies	3	11	42	44	5	13	47	35	6	13	47	34

Source: Eurostat.

Table EUR M.4. Any change in competition levels in the domestic market

Category	Percentage of enterprises expressing opinion			Percentage of enterprises offering opinion expressed in number of salaried employees			Percentage of turnover of enterprises expressing opinion		
	Increase	No change	Decrease	Increase	No change	Decrease	Increase	No change	Decrease
Competitors: domestically owned enterprises	25	64	11	19	70	10	19	71	10
Competitors: other EU-owned enterprises	39	59	2	43	55	3	42	55	3
Competitors: non-EU-owned enterprises	25	74	2	32	66	2	32	66	2
Price competition: domestically owned enterprises	44	51	4	43	54	3	43	54	3
Price competition: other EU-owned enterprises	41	55	4	52	45	3	53	45	3
Price competition: non-EU-owned enterprises	29	67	4	38	59	3	38	59	3
Quality competition: domestically owned enterprises	33	64	3	32	66	2	32	65	2
Quality competition: other EU-owned enterprises	29	69	2	35	63	2	36	62	2
Quality competition: non-EU-owned enterprises	18	79	3	25	73	2	26	72	2

Source: Eurostat.

Table EUR M.5. The extent to which the implementation of the SMP has affected unit costs

Category	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees				Percentage of turnover of enterprises expressing opinion			
	Increase	No change	Reduction	Don't know	Increase	No change	Reduction	Don't know	Increase	No change	Reduction	Don't know
Unit cost of typical or average product	15	53	14	18	10	55	20	15	10	54	21	15

Source: Eurostat.

Table EUR M.6. Importance in changing unit costs

Category	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees				Percentage of turnover of enterprises expressing opinion			
	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know
Production process	10	12	33	44	12	12	32	44	12	13	33	42
Testing and certification	7	12	37	44	7	14	35	44	7	14	36	43
Distribution costs	6	15	35	44	6	18	32	44	6	18	33	42
Marketing costs	3	12	41	44	4	12	40	44	4	12	41	42
Costs of raw materials	16	14	26	44	15	15	26	44	15	15	28	42
Banking costs	6	11	40	44	4	10	42	44	3	10	45	43
Insurance costs	3	11	42	44	2	9	45	44	2	8	47	43
Other cost sources	2	2	24	71	3	2	28	67	3	2	29	66

Source: Eurostat.

Table EUR M.7. Single market legislation as it affects your own firm or sector

Category	Percentage of enterprises expressing opinion			Percentage of enterprises offering opinion expressed in number of salaried employees			Percentage of turnover of enterprises expressing opinion		
	Agree	No opinion	Disagree	Agree	No opinion	Disagree	Agree	No opinion	Disagree
The SMP has been a success for your firm	33	40	27	40	35	25	42	34	24
The SMP has been a success for your sector in your country	25	44	31	26	42	32	27	41	32
The SMP has been a success for your sector in the EU	29	51	20	34	45	22	34	44	21
The SMP has been successful in eliminating obstacles to EU trade in your sector	41	39	20	44	34	22	44	34	22
The SMP has been successful in creating a genuine single market in your sector ¹	23	43	35	25	41	34	25	41	34
Additional measures are needed to eliminate obstacles to EU trade	27	61	12	30	58	12	32	56	12
Additional measures are needed in this sector to create a genuine single market ¹	25	61	14	28	58	14	29	57	15

¹ EUR-11 = EUR-12 excluding Ireland.

Source: Eurostat.

3.2. Construction sectors

Table EUR C.1. Single market's impact on your firm¹

Category	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees				Percentage of turnover of enterprises expressing opinion			
	Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know
Measures to facilitate cross-border operations in other EU states	26	62	1	11	28	60	1	10	26	63	1	10
The opening-up of public procurement	12	60	17	11	16	54	21	9	17	53	22	8
The liberalization of capital movements	19	64	2	15	20	63	2	15	18	65	1	16
Double-taxation agreements	10	59	1	30	15	59	1	25	15	60	1	24

¹ EUR-11 = EUR-12 excluding Elláda.

Source: Eurostat.

Table EUR C.2. Single market's impact on your company's operations¹

Category	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees				Percentage of turnover of enterprises expressing opinion			
	Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know
Sales to the domestic market	11	69	13	7	12	65	17	6	10	67	17	6
Sales to other EU countries	11	69	3	18	11	71	3	15	10	72	3	14
Sales to non-EU countries	9	72	1	19	7	74	1	17	6	76	2	16
Productivity	10	69	6	15	11	71	6	11	10	74	6	10
Profitability	9	63	19	9	8	64	20	8	6	67	19	7
Employment	8	68	16	8	7	68	18	7	6	69	18	6

¹ EUR-11 = EUR-12 excluding Elláda.

Source: Eurostat

Table EUR C.3. Single market's importance to development of strategy¹

Category	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees				Percentage of turnover of enterprises expressing opinion			
	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know
Products/services standardization	8	17	36	39	7	18	40	36	5	18	43	34
Products/services specialization	7	17	34	42	6	17	41	37	4	16	45	35
Pricing	5	18	44	33	6	18	47	29	6	17	49	29
Development of new products/services	4	20	38	39	4	19	43	34	4	18	46	33
Increase in cross-border provision of services to other EU states	6	10	38	46	5	12	41	43	4	12	43	41
Distribution networks in other EU markets	6	5	34	55	4	6	38	51	4	6	40	51
Advertising in other EU states	6	5	36	54	4	6	41	49	3	6	43	48
Purchase of business services from other EU markets	3	17	38	42	6	19	41	34	6	19	42	33
Purchase of financial services from other EU markets	2	9	39	50	2	9	46	42	3	9	47	41
(Direct) Investment in other companies	1	7	37	54	2	9	41	48	3	9	42	46
Co-operation agreements with other companies	2	14	31	54	4	14	36	46	4	14	36	46

¹ EUR-11 = EUR-12 excluding Elláda.

Source: Eurostat.

Table EUR C.4. Any change in competition levels in the domestic market¹

Category	Percentage of enterprises expressing opinion			Percentage of enterprises offering opinion expressed in number of salaried employees			Percentage of turnover of enterprises expressing opinion		
	Increase	No change	Decrease	Increase	No change	Decrease	Increase	No change	Decrease
Competitors: domestically owned enterprises	34	56	9	35	55	10	35	56	9
Competitors: other EU-owned enterprises	32	63	5	43	54	3	45	53	2
Competitors: non-EU-owned enterprises	15	75	10	19	75	6	21	75	4
Price competition: domestically owned enterprises	46	50	3	54	43	4	54	42	4
Price competition: other EU-owned enterprises	28	68	4	38	59	3	38	59	3
Price competition: non-EU-owned enterprises	15	82	4	21	76	3	21	76	3
Product competition: domestically owned enterprises	35	63	3	38	60	3	37	60	3
Product competition: other EU-owned enterprises	21	77	2	25	72	2	25	72	2
Product competition: non-EU-owned enterprises	8	89	3	12	85	3	13	84	3

¹ EUR-11 = EUR-12 excluding Elláda.

Source: Eurostat.

Table EUR C.5. Single market legislation's effect on your firm or sector¹

Category	Percentage of enterprises expressing opinion			Percentage of enterprises offering opinion expressed in number of salaried employees			Percentage of turnover of enterprises expressing opinion		
	Agree	No opinion	Disagree	Agree	No opinion	Disagree	Agree	No opinion	Disagree
The SMP has been a success <i>for your firm</i>	16	51	33	17	48	34	16	50	34
The SMP has been a success for your sector in <i>your country</i>	20	47	33	19	44	37	17	46	37
The SMP has been a success for your sector in the EU	13	60	27	16	58	26	16	58	26
The SMP has been successful in eliminating obstacles to EU trade	24	56	19	24	55	21	21	57	22
The SMP has been successful in creating a genuine single market ²	6	60	34	8	56	36	8	57	34
Additional measures are needed to eliminate obstacles to EU trade	15	72	12	21	66	13	22	66	13
Additional measures are needed in this sector to create a genuine single market ²	26	65	9	27	63	10	26	64	10

¹ EUR-11 = EUR-12 excluding Ireland.² EUR-10 = EUR-12 excluding Elláda and Ireland.

Source: Eurostat.

3.3. Distributive trade sectors

Table EUR D.1. Single market's impact on your firm

Category	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees			
	Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know
Harmonization of licensing/authorization requirements in EU	9	68	3	20	13	68	4	15
Recognition of licences/authorizations in other EU states	8	68	3	22	10	71	2	17
Measures to facilitate cross-border operations into other EU states	25	56	5	14	31	53	6	10
Measures to facilitate physical establishment in other EU states	8	71	2	20	11	71	3	15
The opening-up of public procurement	7	73	2	18	7	75	3	15
The liberalization of capital movements	13	71	1	15	17	69	1	13
Double-taxation agreements	9	67	2	23	13	66	1	19

Source: Eurostat.

Table EUR D.2. Single market's impact on your company's operations

Category	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees			
	Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know
Sales to the domestic market	9	70	10	10	10	72	10	7
Sales to other EU countries	11	73	2	14	12	75	2	11
Sales to non-EU countries	4	79	1	16	4	82	1	13
Productivity	8	77	3	12	9	79	4	9
Profitability	8	71	9	12	10	71	10	8
Employment	5	77	8	9	7	78	8	7

Source: Eurostat.

Table EUR D.3. Single market's importance to development of strategy

Category	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees			
	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know
More standardized products/services	4	15	44	38	5	15	48	31
More specialized products/services	6	13	44	37	5	12	52	31
Pricing	7	19	43	32	7	17	49	27
Development of new products/services	6	15	42	37	6	16	48	30
Efficiency in the provision of products/services	7	12	44	37	7	15	48	30
Increase in cross-border provision of services to other EU states	3	8	43	46	4	11	45	40
Establishment of operations in other EU states	3	5	45	47	4	8	47	42
Distribution networks in other EU markets	3	6	44	47	4	7	48	41
Advertising in other EU states	3	5	43	49	3	5	49	43
Purchase of business services from other EU markets	3	7	44	46	4	8	50	38
Purchase of financial services from other EU markets	1	6	44	49	2	7	50	41
(Direct) Investment in other companies	1	5	40	54	2	6	45	47
(Direct) Investment from other companies	1	4	41	55	1	4	47	48
Co-operation agreements with other companies	2	6	35	57	3	6	41	51

Source: Eurostat.

Table EUR D.4. Any change in competition levels in the domestic market

Category	Percentage of enterprises expressing opinion			Percentage of enterprises offering opinion expressed in number of salaried employees		
	Increase	No change	Decrease	Increase	No change	Decrease
Competitors: domestically owned enterprises	29	65	6	27	66	7
Competitors: other EU-owned enterprises	32	67	1	34	65	1
Competitors: non-EU-owned enterprises	9	90	1	11	88	1
Price competition: domestically owned enterprises	38	60	2	40	58	2
Price competition: other EU-owned enterprises	29	68	3	33	65	2
Price competition: non-EU-owned enterprises	11	85	4	13	85	3
Quality competition: domestically owned enterprises	28	69	3	29	69	2
Quality competition: other EU-owned enterprises	19	79	2	22	76	2
Quality competition: non-EU-owned enterprises	8	90	2	9	89	2

Source: Eurostat.

Table EUR D.5. Single market legislation as it affects your own firm or sector

Category	Percentage of enterprises expressing opinion			Percentage of enterprises offering opinion expressed in number of salaried employees		
	Agree	No opinion	Disagree	Agree	No opinion	Disagree
The SMP has been a success for your firm	18	58	23	22	56	23
The SMP has been a success for your sector in your country	19	59	23	19	58	23
The SMP has been a success for your sector in the EU	16	68	15	19	65	16
The SMP has been successful in eliminating obstacles to EU trade in your sector	27	59	14	29	54	17
The SMP has been successful in creating a genuine single market in your sector ¹	13	65	22	16	59	25
Additional measures are needed to eliminate obstacles to EU trade	20	72	8	20	71	9
Additional measures are needed in this sector to create a genuine single market ¹	16	75	10	17	73	10

¹ EUR-11 = EUR-12 excluding Ireland.

Source: Eurostat.

3.4. Other services sectors**Table EUR S.1. Single market's impact on your firm¹**

Category	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees			
	Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know
Harmonization of licensing/authorization requirements in EU	11	70	7	12	20	66	5	9
Recognition of licences/authorizations in other EU states	12	72	4	13	17	71	3	9
Measures to facilitate cross-border operations into other EU states	22	65	3	10	30	60	4	6
Measures to facilitate physical establishment in other EU states	9	77	1	13	16	74	1	9
The opening-up of public procurement	9	72	4	15	16	68	6	9
The liberalization of capital movements	16	72	1	10	24	66	1	8
Double-taxation agreements	11	69	2	18	17	66	1	15

¹ EUR-11 = EUR-12 excluding BR Deutschland.

Source: Eurostat.

Table EUR S.2. Single market's impact on your company's operations¹

Category	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees			
	Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know
Sales to the domestic market	13	74	5	8	14	71	9	6
Sales to other EU countries	12	76	2	10	19	72	2	7
Sales to non-EU countries	5	83	2	10	7	84	1	8
Productivity	10	78	4	8	14	77	4	6
Profitability	12	75	7	7	14	71	10	5
Employment	9	78	7	7	11	76	8	5

¹ EUR-11 = EUR-12 excluding BR Deutschland.

Source: Eurostat.

Table EUR S.3. Single market's importance to development of strategy¹

Category	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees			
	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know
More standardized products/services	7	15	33	45	8	18	40	35
More specialized products/services	8	15	34	44	10	18	37	34
Pricing	8	13	38	42	10	19	38	32
Development of new products/services	8	15	35	42	11	20	38	31
Efficiency in the provision of products/services	9	12	36	43	11	18	37	34
Increase in cross-border provision of services to other EU states	4	11	32	52	7	16	39	39
Establishment of operations in other EU states	4	9	31	55	5	14	40	41
Distribution networks in other EU markets	3	9	31	57	5	12	41	42
Advertising in other EU states	3	9	36	52	3	9	47	41
Purchase of business services from other EU markets	3	10	34	54	3	14	47	37
Purchase of financial services from other EU markets	3	7	34	56	2	8	46	44
(Direct) Investment in other companies	4	6	28	62	4	12	39	45
(Direct) Investment from other companies	3	7	27	64	3	8	40	49
Co-operation agreements with other companies	4	8	24	64	6	14	34	46

¹ EUR-11 = EUR-12 excluding BR Deutschland.

Source: Eurostat.

Table EUR S.4. Any change in competition levels in the domestic market¹

Category	Percentage of enterprises expressing opinion			Percentage of enterprises offering opinion expressed in number of salaried employees		
	Increase	No change	Decrease	Increase	No change	Decrease
Competitors: domestically owned enterprises	30	63	7	35	58	7
Competitors: other EU-owned enterprises	21	77	2	37	62	2
Competitors: non-EU-owned enterprises	9	88	2	16	82	2
Price competition: domestically owned enterprises	37	60	3	48	49	3
Price competition: other EU-owned enterprises	16	81	3	33	64	2
Price competition: non-EU-owned enterprises	9	87	3	17	80	2
Quality competition: domestically owned enterprises	27	69	4	38	58	4
Quality competition: other EU-owned enterprises	14	83	3	29	69	2
Quality competition: non-EU-owned enterprises	8	89	3	14	84	2

¹ EUR-11 = EUR-12 excluding BR Deutschland.

Source: Eurostat.

Table EUR S.5. Single market legislation as it affects your own firm or sector¹

Category	Percentage of enterprises expressing opinion			Percentage of enterprises offering opinion expressed in number of salaried employees		
	Agree	No opinion	Disagree	Agree	No opinion	Disagree
The SMP has been a success for your firm	16	63	21	25	54	22
The SMP has been a success for your sector in your country	16	62	22	25	51	25
The SMP has been a success for your sector in the EU	15	71	14	24	58	18
The SMP has been successful in eliminating obstacles to EU trade in your sector	22	65	13	29	53	19
The SMP has been successful in creating a genuine single market in your sector ²	6	67	26	13	54	33
Additional measures are needed to eliminate obstacles to EU trade	18	75	7	27	63	9
Additional measures are needed in this sector to create a genuine single market ²	17	76	7	25	65	10

¹ EUR-11 = EUR-12 excluding BR Deutschland.² EUR-10 = EUR-12 excluding BR Deutschland and Ireland.

Source: Eurostat.

3.5. Results of open questions

Some Member States decided to include in their national survey questionnaire open questions suggested by Eurostat and DG XV. The two most important questions relate to suggestions of additional measures that are needed either to eliminate obstacles to EU trade or to create a genuine single market.

The responses were translated and categorized into broad headings by Eurostat. About 350 enterprises answered these questions for the manufacturing sector and a similar figure for the service sector, which is relatively few compared to the 13,500 respondents to the survey.

For the tables given below, the following abbreviations have been used:

Legislation: refers to a reinforcement of the efficiency of the existing European directives. It deals also with implementation of additional rules in specific fields, such as education, working conditions, mobility, social conditions and harmonization.

More Competition: refers to the implementation of a fair competition by the removal of remaining trade barriers, subsidies and use of norms as protectionist measures/instruments.

Harmonization and Standardization: means setting up common technical standards, harmonization of tax policy (especially VAT).

Single Currency: expresses a need for stronger cooperation in monetary policy and more specifically the implementation of a single currency.

Simplification: concerns replies highlighting the need for less bureaucracy and regulations. It refers to firms that complain about the administrative burdens and the complexity of rules and procedures.

Protection: refers to the need for protectionist measures against non-EU companies, mainly by the use of customs duties.

Table OQ M.1. Manufacturing sector: Additional measures needed to create a genuine single market¹

Percentage of enterprises expressing opinion										
Classification	Measures are necessary								Disagree / No opinion	
	TOTAL	Single currency	More competition	Harmonization	Legislation	Protection	Simplification	No example given	No measures	No opinion
EUR-8	32	1	1	3	3	1	1	22	16	53
<i>By Member State</i>										
België/Belgique	19	2	3	4	0	1	0	9	5	76
Danmark	28	3	1	8	1	0	1	14	23	49
Elláda	30	0	1	2	2	6	1	18	4	67
France	28	1	0	1	1	1	0	24	11	63
Italia	49	2	0	5	7	1	2	32	28	23
Luxembourg	23	5	2	5	4	0	2	5	26	53
Portugal	18	0	0	0	0	0	0	18	10	72
United Kingdom	11	1	1	1	1	0	0	7	7	82
Percentage of enterprises offering opinion expressed in number of salaried employees										
EUR-8	40	7	2	4	1	1	1	24	19	41
<i>By Member State</i>										
België/Belgique	46	5	2	5	1	4	2	27	3	51
Danmark	32	1	5	7	3	0	0	16	23	44
Elláda	31	1	3	2	3	8	0	14	12	56
France	36	1	1	0	0	0	0	34	19	44
Italia	51	19	1	3	1	0	1	26	32	17
Luxembourg	51	2	2	1	1	0	13	32	21	28
Portugal	33	0	0	0	0	0	0	33	14	53
United Kingdom	32	1	3	9	1	1	1	16	11	57

¹ EUR-8 = EUR-12 excluding BR Deutschland, España, Ireland and Nederland.

Source: Eurostat.

Table OQ M.2. Manufacturing sector: Additional measures needed to eliminate obstacles to EU trade¹

Percentage of enterprises expressing opinion										
Classification	Measures are necessary								Disagree / No opinion	
	TOTAL	Single currency	More competition	Harmonization	Legislation	Protection	Simplification	No example given	No measures	No opinion
EUR-9	32	2	2	4	1	1	3	19	14	54
<i>By Member State</i>										
België/Belgique	19	4	1	2	2	0	2	8	6	76
Danmark	32	0	4	10	1	0	0	17	19	49
Elláda	19	0	2	2	1	2	2	10	5	74
France	29	2	0	1	0	0	0	26	12	59
Ireland	50	1	4	7	1	3	6	28	22	27
Italia	27	5	2	5	0	0	2	13	6	68
Luxembourg	33	8	2	2	2	0	7	12	29	39
Portugal	9	0	0	0	0	0	0	9	8	83
United Kingdom	13	3	1	2	1	0	1	5	8	79
Percentage of enterprises offering opinion expressed in number of salaried employees										
EUR-9	48	2	5	9	2	0	4	26	13	39
<i>By Member State</i>										
België/Belgique	43	5	3	4	2	0	4	25	8	49
Danmark	45	0	6	6	3	0	0	30	22	33
Elláda	28	0	4	2	2	4	2	14	11	61
France	34	2	0	0	0	0	1	31	14	52
Ireland	76	2	5	23	3	0	7	36	15	10
Italia	37	6	3	9	1	0	2	16	6	57
Luxembourg	48	9	2	0	14	0	19	4	4	48
Portugal	40	0	0	0	0	0	0	40	26	53
United Kingdom	48	2	5	9	2	0	4	26	13	39

¹ EUR-9 = EUR-12 excluding BR Deutschland, España and Nederland.

Source: Eurostat.

Table OQ S.1.¹ Services sector: Additional measures needed to create a genuine single market²

Percentage of enterprises expressing opinion										
Classification	Measures are necessary								Disagree / No opinion	
	TOTAL	Single currency	More competition	Harmonization	Legislation	Protection	Simplification	No example given	No measures	No opinion
EUR-8	17	0	2	2	1	0	1	11	8	76
<i>By Member State</i>										
België/Belgique	17	0	0	5	1	0	0	11	4	80
Danmark	25	1	3	6	0	0	0	15	14	63
Elláda	43	0	4	6	3	1	1	28	7	51
France	16	1	0	4	0	0	0	11	11	74
Italia	36	0	7	1	3	0	2	23	16	47
Luxembourg	32	0	0	0	0	0	0	32	16	51
Portugal	10	0	0	0	0	0	0	10	6	84
United Kingdom	6	0	0	2	0	0	0	4	3	90

Percentage of enterprises offering opinion expressed in number of salaried employees³

EUR-8	22	0	1	3	1	0	1	16	10	68
-------	----	---	---	---	---	---	---	----	----	----

¹ Distributive Trade and Other Services combined.

² EUR-8 = EUR-12 excluding BR Deutschland, España, Ireland and Nederland.

³ Salaried employees for firms expressing opinion have been estimated at the European level for services sectors.

Source: Eurostat.

Table OQ S.2.¹ Services sector: Additional measures needed to eliminate obstacles to EU trade²

Percentage of enterprises expressing opinion										
Classification	Measures are necessary								Disagree / No opinion	
	TOTAL	Single currency	More competition	Harmonization	Legislation	Protection	Simplification	No example given	No measures	No opinion
EUR-9	19	1	1	5	1	0	1	10	6	73
<i>By Member State</i>										
België/Belgique	20	1	1	4	1	0	1	12	5	76
Danmark	29	1	4	6	0	0	0	18	11	61
Elláda	29	1	2	3	3	1	3	16	8	64
France	24	3	0	8	0	0	1	12	8	69
Ireland	22	0	0	5	1	0	1	15	8	70
Italia	23	0	0	4	5	2	0	12	8	45
Luxembourg	38	5	7	3	3	0	11	9	15	47
Portugal	9	0	0	0	0	0	0	9	8	83
United Kingdom	21	1	1	5	1	0	3	10	6	73

Percentage of enterprises offering opinion expressed in number of salaried employees ³										
EUR-9	27	1	2	4	1	0	2	17	8	66

¹ Distributive Trade and Other Services combined.

² EUR-9 = EUR-12 excluding BR Deutschland, España and Nederland.

³ Salaried employees for firms expressing opinion have been estimated at the European level for services sectors.

Source: Eurostat.

4. Unadjusted results item by item

Due to the small size of the sample for the construction sector, no breakdown of the aggregated results in that sector are included in this chapter.

4.1. Manufacturing sectors

Table M.1. Single market's impact on your firm. Harmonization of technical regulations and/or standards

Classification	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees				Percentage of turnover of enterprises expressing opinion			
	Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know
EUR-12	31	51	9	9	40	45	8	8	41	44	8	8
<i>By Member State</i>												
België/Belgique	16	65	4	15	27	60	3	10	30	57	3	10
Danmark	27	60	5	9	32	55	4	10	31	53	3	12
BR Deutschland	20	53	16	11	39	42	10	9	40	42	9	9
Elláda	48	35	2	15	55	34	1	10	58	32	1	9
España	40	46	7	7	52	38	5	4	57	34	5	4
France	31	46	12	11	32	51	8	9	32	51	8	9
Ireland	44	43	5	8	49	39	6	6	50	38	6	6
Italia	42	47	8	3	49	42	6	4	51	41	4	4
Luxembourg	17	64	14	4	51	39	10	1	50	39	10	1
Nederland	24	59	7	10	33	47	6	14	35	45	7	14
Portugal	37	44	2	17	52	34	3	12	60	26	4	10
United Kingdom	25	59	8	8	36	47	11	6	38	44	12	6
<i>By Manufacturing Sector</i>												
Food, beverages and tobacco	35	44	9	12	37	43	11	9	36	45	10	9
Textiles, leather and furniture	27	57	8	9	29	56	7	8	28	58	7	8
Wood, paper and printing/publishing	21	62	7	9	21	65	6	9	22	65	6	7
Chemicals, rubber and plastics	33	47	10	10	44	42	6	8	45	41	5	8
Non-metallic mineral products	30	50	7	13	38	48	6	9	36	49	6	8
Metals and metal products	31	53	7	9	38	48	7	7	40	47	6	6
Machinery and equipment NEC	45	29	20	5	45	34	15	6	45	34	15	6
Electrical and optical machinery	36	48	9	6	48	34	9	9	50	32	9	9
Transport equipment	30	56	11	4	52	38	6	5	52	37	5	5
<i>By Employment Size Class</i>												
20-49	29	53	9	9	28	53	9	10	29	52	9	10
50-199	34	48	10	8	34	48	10	8	34	48	10	8
200-499	38	46	8	8	38	46	8	8	36	47	9	8
500-999	38	47	7	7	39	46	7	7	40	46	7	7
≥ 1,000	50	38	6	6	51	36	6	7	50	37	6	7

Source: Eurostat.

Table M.2. Single market's impact on your firm. Mutual recognition of technical regulations and/or standards

Classification	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees				Percentage of turnover of enterprises expressing opinion			
	Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know
EUR-12	32	49	7	12	40	45	5	10	40	45	5	10
<i>By Member State</i>												
België/Belgique	17	65	4	14	25	63	2	10	26	62	2	10
Danmark	28	63	2	7	33	55	2	11	32	53	2	13
BR Deutschland	29	47	11	13	41	42	7	10	40	43	6	10
Elláda	46	33	2	19	54	32	1	13	56	30	1	13
España	40	46	7	7	52	38	5	4	57	34	5	4
France	32	47	7	14	30	52	4	13	30	53	4	14
Ireland	46	46	2	5	46	43	2	8	46	44	2	8
Italia	37	45	8	10	46	41	5	8	48	40	4	8
Luxembourg	20	57	12	11	50	38	7	4	49	39	7	5
Nederland	22	64	4	10	34	52	3	11	37	49	2	12
Portugal	33	34	4	28	48	32	3	17	54	29	3	15
United Kingdom	24	63	4	9	38	50	5	7	40	48	5	7
<i>By Manufacturing Sector</i>												
Food, beverages and tobacco	30	48	8	15	34	47	7	12	33	48	6	13
Textiles, leather and furniture	26	52	7	15	29	54	4	13	27	57	4	12
Wood, paper and printing/publishing	20	64	5	11	21	65	3	11	23	64	3	10
Chemicals, rubber and plastics	35	49	7	10	43	42	4	10	45	41	4	11
Non-metallic mineral products	27	47	8	19	36	48	5	11	34	50	5	10
Metals and metal products	30	56	5	10	37	51	4	8	38	50	4	8
Machinery and equipment NEC	43	37	11	9	48	37	8	7	49	37	8	7
Electrical and optical machinery	50	36	6	8	51	34	5	10	52	33	4	10
Transport equipment	49	39	7	5	52	38	5	5	51	39	5	5
<i>By Employment Size Class</i>												
20-49	29	50	8	13	28	50	8	14	28	51	8	12
50-199	35	49	6	10	36	49	6	10	36	49	6	10
200-499	38	48	4	10	38	48	4	9	37	50	4	9
500-999	38	47	4	10	39	47	5	9	39	47	5	9
≥ 1,000	49	39	3	9	49	38	4	9	48	39	4	9

Source: Eurostat.

Table M.3. Single market's impact on your firm. Conformity assessment procedures

Classification	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees				Percentage of turnover of enterprises expressing opinion			
	Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know
EUR-12	23	56	5	15	27	55	4	13	28	54	4	14
By Member State												
België/Belgique	13	65	3	19	24	58	2	16	24	57	2	16
Danmark	13	68	1	18	21	56	1	23	22	53	1	24
BR Deutschland	6	68	3	22	14	68	3	15	15	68	2	14
Elláda	15	44	6	36	16	49	5	30	18	48	5	29
España	44	44	4	8	56	36	3	5	59	33	4	4
France	32	44	14	11	32	52	9	7	32	53	8	7
Ireland	29	56	4	10	29	53	4	14	29	53	4	14
Italia	31	54	4	12	39	43	4	13	42	38	4	16
Luxembourg	10	69	9	13	38	53	6	3	35	56	5	4
Nederland	14	67	7	12	22	50	7	21	24	47	8	21
Portugal	29	45	4	23	44	37	2	17	51	32	2	14
United Kingdom	15	66	4	15	22	56	5	17	23	55	5	18
By Manufacturing Sector												
Food, beverages and tobacco	24	52	6	19	27	50	5	18	27	50	5	18
Textiles, leather and furniture	18	63	4	16	22	58	5	15	21	59	5	15
Wood, paper and printing/publishing	16	63	7	15	18	63	4	15	20	62	4	14
Chemicals, rubber and plastics	27	53	6	14	30	53	4	12	31	52	4	13
Non-metallic mineral products	28	47	3	23	32	49	2	17	31	51	3	16
Metals and metal products	22	60	6	13	25	60	4	11	26	59	4	10
Machinery and equipment NEC	32	50	6	12	30	51	6	13	30	52	6	12
Electrical and optical machinery	31	52	8	9	33	49	5	13	34	49	4	13
Transport equipment	24	47	5	24	29	57	3	11	28	59	3	10
By Employment Size Class												
20-49	21	58	5	16	21	58	5	16	21	56	6	17
50-199	25	53	7	14	25	53	7	14	26	53	6	14
200-499	29	54	4	12	29	55	4	12	28	55	4	13
500-999	30	54	3	12	30	54	3	13	32	52	3	12
≥ 1,000	32	52	3	13	30	55	3	12	29	55	3	13

Source: Eurostat.

Table M.4. Single market's impact on your firm. Simplified patenting procedures

Classification	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees				Percentage of turnover of enterprises expressing opinion			
	Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know
EUR-12	13	64	2	21	24	57	1	18	25	57	1	17
By Member State												
België/Belgique	3	72	0	25	10	67	0	24	10	65	0	24
Danmark	14	64	2	20	31	55	1	14	35	51	0	13
BR Deutschland	14	57	2	27	31	50	1	18	33	49	1	17
Elláda	25	38	1	36	26	44	1	29	29	42	1	28
España	21	56	0	23	27	55	1	18	27	56	0	17
France	14	62	1	24	20	63	0	17	20	64	0	16
Ireland	16	66	2	16	17	69	1	14	17	69	1	13
Italia	11	71	4	15	20	61	2	18	23	56	1	19
Luxembourg	8	62	3	26	48	40	1	11	42	46	0	12
Nederland	3	69	3	25	11	66	1	22	14	64	1	22
Portugal	20	56	3	21	35	47	4	14	37	44	5	13
United Kingdom	11	73	1	16	18	64	2	17	19	63	2	16
By Manufacturing Sector												
Food, beverages and tobacco	13	66	1	21	17	62	2	19	17	62	1	19
Textiles, leather and furniture	13	66	2	19	19	63	1	17	18	63	1	18
Wood, paper and printing/publishing	10	69	0	20	13	71	1	16	14	72	1	14
Chemicals, rubber and plastics	18	58	1	22	34	46	1	18	35	45	1	18
Non-metallic mineral products	11	59	6	24	20	55	3	21	19	57	2	21
Metals and metal products	10	64	4	23	18	62	1	20	19	61	1	19
Machinery and equipment NEC	19	56	2	24	30	50	2	18	30	50	2	18
Electrical and optical machinery	16	69	1	14	27	54	1	18	27	53	1	19
Transport equipment	12	58	0	30	32	56	1	11	33	57	1	10
By Employment Size Class												
20-49	9	66	2	23	10	65	2	23	9	66	2	24
50-199	17	62	2	18	18	62	2	18	17	63	2	18
200-499	23	58	1	18	23	58	1	18	22	58	1	19
500-999	22	63	1	14	23	63	1	13	22	64	1	13
≥ 1,000	36	47	1	16	36	48	1	15	36	48	1	16

Source: Eurostat.

Table M.5. Single market's impact on your firm. The opening up of public procurement

Classification	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees				Percentage of turnover of enterprises expressing opinion			
	Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know
EUR-12	9	71	4	16	13	68	5	13	13	69	4	13
<i>By Member State</i>												
België/Belgique	6	74	4	15	8	74	5	13	7	76	4	12
Danmark	10	69	2	18	8	71	3	18	7	71	2	20
BR Deutschland	6	63	5	26	15	61	5	19	16	62	4	18
Elláda	19	43	6	32	20	49	6	24	21	49	6	24
España	23	60	4	13	25	60	4	12	26	59	3	12
France	7	76	6	11	9	79	6	6	9	81	5	5
Ireland	14	69	4	12	11	77	4	8	10	79	3	7
Italia	9	80	1	10	14	73	4	10	15	70	4	11
Luxembourg	11	66	12	12	41	53	4	3	34	59	3	4
Nederland	2	69	13	16	5	63	12	20	5	68	9	18
Portugal	7	59	5	28	13	61	6	20	14	63	7	16
United Kingdom	9	75	2	15	10	74	4	12	11	73	5	12
<i>By Manufacturing Sector</i>												
Food, beverages and tobacco	10	72	2	16	9	73	2	16	9	74	1	16
Textiles, leather and furniture	8	71	4	17	10	69	5	15	10	69	6	15
Wood, paper and printing/publishing	10	74	3	13	9	77	4	10	10	77	4	9
Chemicals, rubber and plastics	10	71	3	16	15	68	2	14	15	69	2	14
Non-metallic mineral products	20	64	5	12	16	65	5	13	16	65	5	14
Metals and metal products	6	72	5	18	9	70	7	14	10	70	7	12
Machinery and equipment NEC	6	72	5	17	11	70	5	15	11	70	5	15
Electrical and optical machinery	13	60	6	21	20	55	10	15	21	55	10	14
Transport equipment	11	75	2	12	19	70	4	7	18	71	4	6
<i>By Employment Size Class</i>												
20-49	8	70	3	18	9	70	3	19	9	71	3	18
50-199	10	71	6	13	10	71	5	13	10	72	4	13
200-499	11	72	5	13	11	72	5	12	10	73	4	12
500-999	10	72	6	12	10	72	6	11	10	74	5	11
≥ 1,000	20	62	5	12	20	62	5	13	19	64	5	12

Source: Eurostat.

Table M.6. Single market's impact on your firm. The elimination of customs documentation

Classification	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees				Percentage of turnover of enterprises expressing opinion			
	Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know
EUR-12	60	30	5	5	69	23	5	3	69	22	5	3
<i>By Member State</i>												
België/Belgique	59	32	2	7	67	24	3	5	68	25	3	4
Danmark	84	12	3	1	84	12	3	1	85	12	2	2
BR Deutschland	71	20	4	6	76	15	5	4	76	15	5	4
Elláda	87	8	1	4	90	6	2	2	92	5	2	2
España	77	18	2	4	87	10	1	2	88	9	1	2
France	56	32	9	4	60	28	8	3	60	28	9	3
Ireland	87	9	4	0	92	4	3	0	92	4	3	1
Italia	61	30	6	3	72	20	6	3	76	16	5	3
Luxembourg	55	20	24	1	72	7	20	0	70	6	25	0
Nederland	48	44	2	6	64	28	3	4	66	24	5	4
Portugal	55	29	6	11	74	16	6	4	79	12	6	3
United Kingdom	39	53	2	6	51	41	4	5	52	40	4	4
<i>By Manufacturing Sector</i>												
Food, beverages and tobacco	59	29	4	7	66	24	6	4	67	24	6	4
Textiles, leather and furniture	60	30	5	5	66	24	6	4	66	24	6	4
Wood, paper and printing/publishing	54	37	5	5	58	34	4	4	59	34	3	3
Chemicals, rubber and plastics	65	26	4	4	76	15	6	3	77	15	6	3
Non-metallic mineral products	49	35	9	7	60	29	6	4	61	29	6	4
Metals and metal products	53	39	3	4	64	27	5	3	66	25	5	3
Machinery and equipment NEC	73	20	3	5	74	19	4	3	74	19	4	3
Electrical and optical machinery	67	24	5	4	75	19	5	2	75	19	4	2
Transport equipment	71	24	3	2	70	20	6	5	69	20	6	5
<i>By Employment Size Class</i>												
20-49	54	36	4	6	54	36	4	6	54	36	4	6
50-199	67	22	6	4	68	22	6	4	68	22	6	4
200-499	73	20	5	3	73	20	4	3	74	19	4	3
500-999	71	21	6	2	70	22	6	2	70	23	5	2
≥ 1,000	72	20	5	3	73	19	5	3	72	19	6	3

Source: Eurostat.

Table M.7. Single market's impact on your firm. Deregulation of freight transport

Classification	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees				Percentage of turnover of enterprises expressing opinion			
	Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know
EUR-12	43	43	3	12	50	38	2	10	51	37	2	10
<i>By Member State</i>												
België/Belgique	39	45	1	15	47	40	1	11	49	40	2	10
Danmark	52	41	0	7	54	35	0	11	56	33	0	11
BR Deutschland	41	37	2	20	52	34	2	12	53	33	2	12
Elláda	69	15	2	14	76	13	1	10	77	12	1	10
España	44	42	2	12	54	34	2	10	57	32	2	9
France	35	47	4	14	41	44	2	13	40	44	2	14
Ireland	69	26	1	3	75	21	1	3	76	21	1	2
Italia	57	35	4	4	66	26	3	5	68	24	3	5
Luxembourg	41	39	10	10	66	19	5	10	73	16	5	6
Nederland	26	59	0	15	42	47	1	11	47	39	1	13
Portugal	48	31	7	14	63	24	6	8	66	21	6	7
United Kingdom	30	61	1	9	39	52	2	8	40	51	2	7
<i>By Manufacturing Sector</i>												
Food, beverages and tobacco	42	45	2	10	50	37	2	11	50	36	2	12
Textiles, leather and furniture	46	40	3	11	52	36	3	9	51	37	3	10
Wood, paper and printing/publishing	34	50	4	12	42	46	3	10	44	45	2	9
Chemicals, rubber and plastics	48	35	4	13	54	33	2	11	55	33	2	10
Non-metallic mineral products	38	52	2	9	50	41	2	7	50	41	3	7
Metals and metal products	40	47	2	11	50	40	3	8	52	38	3	7
Machinery and equipment NEC	50	40	1	8	56	34	1	9	56	34	1	9
Electrical and optical machinery	39	36	2	22	48	37	2	13	49	37	2	12
Transport equipment	45	44	1	10	48	39	2	11	48	39	2	11
<i>By Employment Size Class</i>												
20-49	38	46	3	13	38	46	3	13	37	47	3	13
50-199	48	39	3	10	49	39	3	10	49	39	2	9
200-499	52	37	2	9	52	38	2	9	52	38	1	9
500-999	52	35	2	11	53	35	2	11	52	34	2	12
≥ 1,000	57	33	2	8	55	33	2	9	54	34	2	10

Source: Eurostat.

Table M.8. Single market's impact on your firm. The elimination of delays at frontiers

Classification	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees				Percentage of turnover of enterprises expressing opinion			
	Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know
EUR-12	56	35	2	7	63	31	1	5	63	31	1	5
<i>By Member State</i>												
België/Belgique	61	32	0	7	65	30	0	5	66	30	0	4
Danmark	56	36	0	8	57	34	1	9	60	31	0	9
BR Deutschland	56	33	1	10	62	30	1	6	63	30	2	6
Elláda	82	10	0	7	83	12	0	5	84	10	0	6
España	76	19	1	4	86	11	1	2	87	10	1	2
France	56	36	1	7	58	37	1	4	59	37	0	4
Ireland	81	16	1	2	87	11	1	2	87	11	1	2
Italia	62	31	4	3	73	23	2	3	75	20	1	4
Luxembourg	60	36	2	2	75	24	0	1	74	26	0	0
Nederland	46	46	0	8	77	16	0	6	82	12	0	5
Portugal	57	29	0	14	77	16	0	6	82	12	0	5
United Kingdom	33	58	1	8	45	48	1	7	46	47	1	7
<i>By Manufacturing Sector</i>												
Food, beverages and tobacco	60	31	3	7	64	28	2	6	65	27	3	5
Textiles, leather and furniture	61	30	2	7	66	27	2	6	65	27	2	6
Wood, paper and printing/publishing	49	42	1	8	52	41	1	6	53	41	1	6
Chemicals, rubber and plastics	61	30	1	8	70	25	1	5	70	24	1	5
Non-metallic mineral products	38	49	4	8	53	38	2	7	53	38	2	7
Metals and metal products	46	43	1	10	58	34	1	7	61	32	1	6
Machinery and equipment NEC	64	30	0	5	67	27	1	5	67	27	1	5
Electrical and optical machinery	67	27	1	5	63	30	0	6	63	31	0	6
Transport equipment	50	47	0	3	61	37	0	2	60	38	0	2
<i>By Employment Size Class</i>												
20-49	51	39	2	8	51	39	2	8	50	40	2	8
50-199	63	30	1	6	64	29	1	6	64	29	1	6
200-499	66	28	1	5	66	28	1	5	66	28	1	5
500-999	67	29	1	3	66	29	1	4	66	29	1	4
≥ 1,000	65	29	1	4	65	30	1	4	64	31	1	4

Source: Eurostat.

Table M.9. Single market's impact on your firm. The change in VAT procedures for intra-EU sales

Classification	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees				Percentage of turnover of enterprises expressing opinion			
	Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know
EUR-12	32	41	15	11	32	37	21	11	31	36	22	11
By Member State												
België/Belgique	36	41	11	11	40	32	17	11	40	32	17	10
Danmark	57	28	12	4	52	33	11	5	54	32	10	5
BR Deutschland	16	46	16	22	18	41	25	16	18	41	26	16
Elláda	65	21	4	11	69	18	6	7	70	17	5	7
España	39	38	11	12	50	31	9	10	51	31	9	9
France	31	39	25	5	27	35	30	8	27	34	30	10
Ireland	60	23	12	5	57	26	12	5	57	26	12	5
Italia	46	31	14	9	49	23	19	9	51	19	20	10
Luxembourg	23	48	26	3	49	31	19	1	45	32	22	1
Nederland	26	44	17	12	31	35	23	11	33	32	23	12
Portugal	42	49	4	4	52	38	5	5	53	37	5	5
United Kingdom	22	56	14	9	27	48	16	9	27	47	17	9
By Manufacturing Sector												
Food, beverages and tobacco	32	44	13	11	32	41	16	11	31	39	18	12
Textiles, leather and furniture	35	40	15	10	37	36	20	8	34	35	23	8
Wood, paper and printing/publishing	29	43	18	10	28	45	20	7	29	43	22	6
Chemicals, rubber and plastics	34	37	19	11	31	29	30	10	32	28	30	10
Non-metallic mineral products	29	47	11	13	34	38	16	12	33	38	17	12
Metals and metal products	28	49	14	10	30	38	20	11	31	36	21	12
Machinery and equipment NEC	37	43	13	7	31	39	20	11	30	39	20	11
Electrical and optical machinery	34	31	16	19	30	35	21	15	29	35	21	15
Transport equipment	30	33	19	18	32	35	19	14	31	36	19	14
By Employment Size Class												
20-49	32	44	12	13	31	45	11	13	31	44	12	13
50-199	33	39	20	8	33	39	20	8	33	39	20	9
200-499	35	35	21	8	35	34	22	9	34	34	22	9
500-999	29	35	28	8	29	36	28	7	28	37	27	8
≥ 1,000	30	33	23	14	29	33	23	15	30	33	23	15

Source: Eurostat.

Table M.10. Single market's impact on your firm. The liberation of capital movements

Classification	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees				Percentage of turnover of enterprises expressing opinion			
	Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know
EUR-12	23	61	2	14	29	58	1	12	29	58	1	12
By Member State												
België/Belgique	16	69	0	15	27	61	0	12	29	60	0	12
Danmark	26	63	1	9	32	56	1	12	32	53	1	14
BR Deutschland	16	57	2	25	24	60	1	15	24	60	1	14
Elláda	64	21	3	12	68	22	1	9	72	20	1	7
España	40	44	2	14	55	35	1	9	57	34	1	8
France	13	72	2	12	23	66	1	10	23	65	1	11
Ireland	25	62	2	10	30	62	1	7	30	64	0	6
Italia	34	56	3	7	44	45	1	10	45	42	2	12
Luxembourg	16	68	2	15	50	41	0	9	53	42	0	5
Nederland	16	68	3	13	17	67	1	15	18	65	0	17
Portugal	37	49	1	13	55	34	1	9	61	31	1	7
United Kingdom	9	78	1	13	14	72	1	12	16	71	1	12
By Manufacturing Sector												
Food, beverages and tobacco	20	64	4	13	25	61	2	12	23	63	1	12
Textiles, leather and furniture	28	58	1	13	33	55	2	11	30	57	2	11
Wood, paper and printing/publishing	19	68	2	11	23	66	1	10	24	66	1	9
Chemicals, rubber and plastics	26	63	1	11	35	56	1	9	36	55	1	9
Non-metallic mineral products	20	63	4	13	30	58	1	11	29	59	1	11
Metals and metal products	20	65	1	14	24	62	2	13	26	59	2	14
Machinery and equipment NEC	26	59	4	11	30	56	2	12	31	56	2	12
Electrical and optical machinery	24	52	2	22	25	60	1	14	25	61	1	13
Transport equipment	18	51	0	31	35	48	0	17	35	48	0	17
By Employment Size Class												
20-49	20	62	2	16	20	62	2	16	18	64	3	16
50-199	25	61	1	12	26	61	1	12	25	61	1	12
200-499	31	60	0	10	30	60	0	10	27	62	0	10
500-999	28	61	3	8	28	61	3	9	25	63	2	9
≥ 1,000	37	51	1	12	36	51	0	13	36	51	0	13

Source: Eurostat.

Table M.12. Single market's impact on your company's operations. Sales to the domestic market

Classification	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees				Percentage of turnover of enterprises expressing opinion			
	Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know
EUR-12	13	67	15	5	10	70	15	4	10	71	15	4
<i>By Member State</i>												
België/Belgique	4	75	15	6	4	77	14	5	4	79	13	4
Danmark	6	90	3	1	5	87	5	3	4	89	4	2
BR Deutschland	6	74	14	6	7	76	11	6	7	76	11	6
Elláda	16	52	27	5	16	56	24	4	17	55	24	4
España	11	54	33	2	11	50	38	1	11	50	38	1
France	5	70	19	5	3	76	18	2	3	78	17	2
Ireland	8	75	15	1	5	80	13	2	5	80	13	2
Italia	37	54	6	3	31	61	5	3	31	61	5	3
Luxembourg	3	66	28	2	3	89	8	1	2	91	8	0
Nederland	6	74	13	7	4	70	17	9	4	73	16	7
Portugal	7	56	22	16	8	57	29	6	11	53	33	4
United Kingdom	7	79	8	7	8	72	15	5	8	69	17	5
<i>By Manufacturing Sector</i>												
Food, beverages and tobacco	14	63	19	4	10	63	24	3	10	64	23	3
Textiles, leather and furniture	13	63	17	7	10	68	17	5	9	70	17	5
Wood, paper and printing/publishing	9	71	13	7	8	72	13	6	10	72	12	6
Chemicals, rubber and plastics	14	62	17	6	10	73	14	4	10	74	13	4
Non-metallic mineral products	11	70	14	6	11	71	14	4	11	72	13	4
Metals and metal products	16	66	13	4	11	67	19	3	11	67	20	2
Machinery and equipment NEC	18	67	12	3	12	76	9	3	11	77	9	3
Electrical and optical machinery	12	72	11	5	10	68	15	7	10	68	15	7
Transport equipment	8	77	12	2	10	76	11	4	10	77	10	3
<i>By Employment Size Class</i>												
20-49	16	64	14	6	15	64	14	6	16	65	14	5
50-199	10	70	15	5	9	71	16	5	10	71	15	4
200-499	10	71	16	4	10	71	16	4	10	71	15	4
500-999	9	70	17	3	8	71	17	4	9	71	16	4
≥ 1,000	9	71	18	3	9	72	15	4	10	72	15	3

Source: Eurostat.

Table M.13. Single market's impact on your company's operations. Sales to other EU countries

Classification	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees				Percentage of turnover of enterprises expressing opinion			
	Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know
EUR-12	28	61	4	6	30	60	4	5	31	60	4	5
<i>By Member State</i>												
België/Belgique	18	69	7	6	21	69	6	4	21	70	6	4
Danmark	33	63	1	3	39	56	2	3	45	51	2	3
BR Deutschland	16	65	10	10	20	65	6	8	21	64	6	9
Elláda	34	47	3	16	42	43	6	8	45	44	4	8
España	47	47	2	4	54	41	3	2	56	40	3	2
France	21	68	6	6	24	67	5	4	25	67	4	4
Ireland	37	57	4	2	36	60	2	2	37	60	2	2
Italia	42	54	2	3	46	50	2	3	47	49	2	2
Luxembourg	20	72	5	4	28	70	2	1	29	70	1	0
Nederland	27	60	2	10	29	60	3	8	31	60	4	5
Portugal	29	54	6	11	41	48	6	5	40	51	5	4
United Kingdom	20	73	1	6	28	66	1	5	30	65	2	4
<i>By Manufacturing Sector</i>												
Food, beverages and tobacco	28	61	5	6	38	54	4	5	38	53	4	4
Textiles, leather and furniture	34	54	4	8	35	55	4	6	32	58	4	6
Wood, paper and printing/publishing	20	68	5	8	22	68	4	6	23	68	3	5
Chemicals, rubber and plastics	30	59	3	8	34	58	2	6	34	57	2	6
Non-metallic mineral products	25	62	6	8	31	62	3	4	30	63	3	4
Metals and metal products	27	63	4	5	29	60	7	4	31	59	7	3
Machinery and equipment NEC	31	60	5	4	27	65	4	4	26	66	4	4
Electrical and optical machinery	27	65	3	4	30	60	3	7	30	59	3	7
Transport equipment	19	72	5	4	25	66	5	4	25	67	4	4
<i>By Employment Size Class</i>												
20-49	25	63	4	7	25	64	4	7	23	66	5	7
50-199	32	58	4	6	32	58	4	6	32	58	4	6
200-499	34	58	4	4	34	58	4	4	36	57	4	4
500-999	27	63	7	3	27	63	7	3	28	63	6	3
≥ 1,000	33	59	3	4	30	61	3	5	31	61	3	5

Source: Eurostat.

Table M.14. Single market's impact on your company's operations. Sales to non-EU countries

Classification	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees				Percentage of turnover of enterprises expressing opinion			
	Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know
EUR-12	9	78	3	9	8	82	3	8	8	82	3	7
<i>By Member State</i>												
België/Belgique	1	85	4	10	3	86	3	7	3	88	3	6
Danmark	5	87	4	5	5	84	7	5	5	82	9	4
BR Deutschland	3	75	5	17	4	80	3	13	4	80	3	13
Elláda	18	60	4	18	20	65	4	11	23	64	3	10
España	10	82	3	6	12	82	2	3	13	81	3	3
France	3	84	3	10	5	86	2	6	5	87	2	6
Ireland	6	88	1	5	9	84	2	5	9	85	2	4
Italia	22	70	4	3	22	72	3	3	21	72	3	3
Luxembourg	3	79	3	15	7	87	1	5	11	84	1	4
Nederland	6	78	1	15	6	81	2	11	7	82	3	8
Portugal	5	75	7	14	6	80	7	7	7	82	5	6
United Kingdom	5	87	1	7	5	87	2	6	5	88	2	5
<i>By Manufacturing Sector</i>												
Food, beverages and tobacco	10	76	4	10	8	79	4	8	8	80	4	8
Textiles, leather and furniture	10	76	4	9	10	78	4	8	9	79	3	9
Wood, paper and printing/publishing	7	79	3	11	6	82	2	10	8	82	2	8
Chemicals, rubber and plastics	6	79	3	12	7	82	2	9	7	83	2	8
Non-metallic mineral products	10	76	5	9	7	84	3	5	7	84	3	5
Metals and metal products	7	80	1	11	7	83	3	8	8	83	3	7
Machinery and equipment NEC	11	77	7	6	7	83	4	7	7	83	3	7
Electrical and optical machinery	10	84	1	5	8	81	3	9	7	81	3	9
Transport equipment	5	87	2	7	8	84	3	5	9	84	2	5
<i>By Employment Size Class</i>												
20-49	9	77	4	10	9	77	4	10	9	77	4	10
50-199	8	80	4	9	8	80	3	9	8	80	3	9
200-499	8	83	2	7	8	83	2	7	8	83	2	7
500-999	5	87	2	6	5	88	2	6	5	88	1	6
≥ 1,000	8	83	3	6	8	82	3	7	8	82	3	7

Source: Eurostat.

Table M.15. Single market's impact on your company's operations. Productivity

Classification	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees				Percentage of turnover of enterprises expressing opinion			
	Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know
EUR-12	16	74	4	6	14	76	3	7	14	77	3	6
<i>By Member State</i>												
België/Belgique	10	81	3	6	11	82	3	4	11	83	2	4
Danmark	11	83	1	5	14	80	1	4	16	79	1	4
BR Deutschland	4	80	4	12	6	79	2	13	6	79	2	13
Elláda	28	58	7	8	32	57	4	7	34	56	4	6
España	19	72	6	2	26	68	4	2	27	67	4	2
France	11	79	5	6	10	82	3	4	11	82	3	5
Ireland	13	80	6	2	16	79	4	1	17	78	4	1
Italia	36	58	4	2	34	62	2	2	32	63	3	2
Luxembourg	4	80	8	8	7	84	2	6	11	81	2	7
Nederland	9	80	5	6	11	82	5	3	12	80	5	3
Portugal	19	60	9	12	29	60	7	4	31	59	8	3
United Kingdom	6	85	4	6	9	83	3	5	10	82	3	5
<i>By Manufacturing Sector</i>												
Food, beverages and tobacco	13	73	8	6	14	75	5	6	14	76	4	6
Textiles, leather and furniture	19	71	3	7	17	74	4	6	13	78	4	6
Wood, paper and printing/publishing	10	80	4	6	9	83	3	5	9	84	3	4
Chemicals, rubber and plastics	16	71	6	7	15	77	3	6	15	77	3	5
Non-metallic mineral products	13	74	6	6	14	79	3	4	14	80	2	4
Metals and metal products	17	75	3	6	13	79	2	6	12	80	2	5
Machinery and equipment NEC	19	72	5	5	12	78	3	7	12	79	3	7
Electrical and optical machinery	13	77	4	6	15	73	2	10	16	72	2	11
Transport equipment	14	76	5	6	17	73	2	8	17	74	1	8
<i>By Employment Size Class</i>												
20-49	17	72	5	6	16	72	5	7	14	74	6	6
50-199	15	76	4	6	15	76	3	6	14	77	3	6
200-499	12	79	3	6	12	79	3	6	12	79	3	7
500-999	14	76	4	6	13	77	4	6	13	79	3	6
≥ 1,000	15	77	2	6	15	76	1	8	15	76	1	7

Source: Eurostat.

Table M.16. Single market's impact on your company's operations. Profitability

Classification	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees				Percentage of turnover of enterprises expressing opinion			
	Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know
EUR-12	16	66	12	6	14	67	13	6	14	67	13	7
By Member State												
België/Belgique	9	67	18	6	7	67	19	6	7	68	19	6
Danmark	20	72	4	4	22	64	10	4	25	59	12	4
BR Deutschland	4	70	16	10	7	69	13	11	8	69	12	12
Elláda	22	49	21	8	27	50	15	9	28	50	14	8
España	14	62	20	3	19	59	19	3	20	59	19	3
France	7	72	15	6	8	74	13	5	9	74	13	5
Ireland	22	59	16	3	25	60	12	2	26	59	13	2
Italia	40	52	6	2	33	57	6	3	31	58	7	4
Luxembourg	4	71	17	8	9	80	5	6	12	76	5	7
Nederland	10	75	9	6	11	74	12	3	12	74	12	2
Portugal	11	58	17	14	22	55	15	8	25	50	18	7
United Kingdom	11	76	8	6	14	69	12	5	15	67	13	4
By Manufacturing Sector												
Food, beverages and tobacco	13	63	19	6	15	62	16	7	15	63	15	7
Textiles, leather and furniture	20	64	10	6	16	68	10	5	13	70	11	6
Wood, paper and printing/publishing	8	75	11	6	9	75	11	5	11	74	10	4
Chemicals, rubber and plastics	16	61	15	8	16	66	14	4	17	65	14	4
Non-metallic mineral products	15	71	9	6	14	75	6	5	13	76	6	5
Metals and metal products	18	64	12	6	12	67	15	6	11	68	15	6
Machinery and equipment NEC	18	61	15	6	12	70	12	6	11	70	12	6
Electrical and optical machinery	16	66	13	5	15	63	12	10	15	62	12	10
Transport equipment	10	74	11	5	16	63	11	9	16	64	11	9
By Employment Size Class												
20-49	17	65	12	6	16	65	12	6	15	66	14	6
50-199	14	67	13	6	14	68	13	5	14	68	12	5
200-499	14	65	14	7	14	66	14	6	14	65	14	7
500-999	12	68	14	6	12	69	14	6	12	69	13	6
≥ 1,000	14	67	12	6	14	67	11	8	15	66	12	7

Source: Eurostat.

Table M.17. Single market's impact on your company's operations. Employment

Classification	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees				Percentage of turnover of enterprises expressing opinion			
	Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know
EUR-12	12	73	10	5	9	73	13	5	8	74	13	5
<i>By Member State</i>												
België/Belgique	4	75	15	6	4	72	19	4	4	73	18	4
Danmark	20	73	2	5	23	68	4	4	25	67	4	4
BR Deutschland	3	77	12	8	3	75	13	9	3	75	13	9
Elláda	17	48	29	6	15	55	24	6	17	56	22	6
España	10	70	17	3	10	68	20	2	10	68	20	2
France	3	83	11	4	2	82	13	3	2	82	13	2
Ireland	25	60	14	0	22	62	15	1	22	62	16	1
Italia	29	65	5	1	23	70	6	1	20	71	8	1
Luxembourg	7	68	16	9	3	83	8	6	5	81	7	7
Nederland	13	73	8	6	10	72	13	5	11	70	13	6
Portugal	6	64	17	13	9	62	21	8	10	59	25	6
United Kingdom	9	79	6	5	11	74	11	4	11	73	12	4
<i>By Manufacturing Sector</i>												
Food, beverages and tobacco	6	77	12	5	8	73	13	5	8	74	12	5
Textiles, leather and furniture	13	71	10	6	9	72	13	5	8	74	13	5
Wood, paper and printing/publishing	6	81	9	4	6	81	9	4	7	81	9	3
Chemicals, rubber and plastics	14	68	12	6	11	72	14	4	11	72	14	4
Non-metallic mineral products	10	74	9	8	9	79	8	5	8	80	7	5
Metals and metal products	13	73	10	4	8	73	14	5	8	74	14	4
Machinery and equipment NEC	18	69	10	3	12	75	9	4	12	76	9	4
Electrical and optical machinery	11	75	10	4	9	68	16	7	9	67	16	8
Transport equipment	13	74	11	2	6	74	16	5	5	75	15	4
<i>By Employment Size Class</i>												
20-49	12	74	9	5	11	74	9	5	10	76	10	5
50-199	12	73	12	4	11	73	12	4	12	74	10	4
200-499	10	73	12	4	10	73	13	4	11	74	11	4
500-999	8	72	16	4	8	73	15	4	8	74	14	4
≥ 1,000	6	74	15	5	5	74	15	6	5	74	15	6

Source: Eurostat.

Table M.18. Single market's importance to development of strategy. Product standardization

Classification	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees				Percentage of turnover of enterprises expressing opinion			
	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know
EUR-12	10	19	47	25	11	23	48	18	11	24	48	16
By Member State												
België/Belgique	3	37	29	30	5	36	35	24	6	39	34	22
Danmark	9	28	51	11	12	34	45	9	13	35	43	8
BR Deutschland	3	15	63	20	7	24	59	10	7	25	58	10
Elláda	24	27	21	28	26	30	22	21	29	32	22	18
España	8	26	31	35	10	28	32	30	11	29	32	28
France	1	12	41	46	1	14	52	33	1	16	54	29
Ireland	14	31	39	16	13	30	46	11	12	31	47	11
Italia	23	20	54	3	26	25	45	4	28	25	43	4
Luxembourg	15	16	32	36	40	14	28	18	38	15	26	21
Nederland	8	26	25	42	13	28	32	27	15	27	31	28
Portugal	15	19	30	35	16	23	33	27	18	27	33	23
United Kingdom	7	17	50	26	14	22	46	17	15	23	46	15
By Manufacturing Sector												
Food, beverages and tobacco	14	18	41	27	13	25	45	17	13	26	46	15
Textiles, leather and furniture	7	18	52	23	7	17	56	20	6	15	60	19
Wood, paper and printing/publishing	6	12	48	33	6	14	53	27	7	14	55	23
Chemicals, rubber and plastics	8	27	43	22	13	29	45	14	13	29	44	13
Non-metallic mineral products	11	18	46	25	14	22	45	19	14	21	46	20
Metals and metal products	10	16	46	28	9	20	48	23	10	20	49	21
Machinery and equipment NEC	15	24	43	18	16	26	46	12	16	26	46	12
Electrical and optical machinery	13	21	52	14	14	31	42	13	15	31	41	13
Transport equipment	9	19	35	37	9	22	53	17	8	22	55	15
By Employment Size Class												
20-49	9	16	46	28	9	16	46	29	10	16	44	30
50-199	9	22	48	21	9	22	48	21	9	22	48	21
200-499	13	23	47	17	13	24	47	16	12	24	48	16
500-999	10	25	46	19	11	26	46	17	11	28	46	15
≥ 1,000	15	26	49	10	13	26	51	10	13	26	51	10

Source: Eurostat.

Table M.19. Single market's importance to development of strategy. Product specialization

Classification	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees				Percentage of turnover of enterprises expressing opinion			
	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know
EUR-12	11	20	45	24	9	21	52	18	9	21	53	17
<i>By Member State</i>												
België/Belgique	3	44	29	24	3	35	38	24	3	37	36	24
Danmark	3	27	58	12	8	29	53	9	10	31	50	9
BR Deutschland	2	18	60	20	4	21	65	10	4	21	65	10
Elláda	20	29	24	28	24	30	24	22	25	32	24	19
España	15	27	30	27	15	30	31	25	15	30	31	24
France	4	12	39	45	2	11	52	35	2	11	55	33
Ireland	10	22	51	18	9	24	49	17	9	25	50	16
Italia	27	23	47	3	25	22	48	5	25	22	47	6
Luxembourg	14	18	28	40	8	18	51	23	10	20	45	26
Nederland	11	15	31	44	11	20	42	28	9	24	38	29
Portugal	17	27	24	32	15	30	31	24	13	32	34	21
United Kingdom	5	14	54	27	9	18	54	19	9	19	54	18
<i>By Manufacturing Sector</i>												
Food, beverages and tobacco	14	21	37	28	9	27	45	20	9	27	46	19
Textiles, leather and furniture	13	21	46	20	11	21	50	18	8	20	54	17
Wood, paper and printing/publishing	6	15	47	33	6	14	53	26	7	14	57	23
Chemicals, rubber and plastics	10	24	46	20	8	21	56	15	9	21	56	14
Non-metallic mineral products	13	13	45	28	9	22	46	22	9	22	47	22
Metals and metal products	9	17	46	28	10	17	50	23	11	17	51	21
Machinery and equipment NEC	14	22	48	16	11	22	55	12	11	22	55	12
Electrical and optical machinery	11	29	45	15	11	24	53	13	11	23	53	13
Transport equipment	8	13	43	36	7	15	59	18	6	16	61	17
<i>By Employment Size Class</i>												
20-49	12	19	42	27	12	19	42	28	11	18	42	29
50-199	10	21	49	20	10	21	49	20	10	22	48	20
200-499	10	23	51	16	10	23	51	16	9	23	52	16
500-999	7	24	49	20	7	24	50	19	8	23	50	18
≥ 1,000	9	21	58	12	8	19	61	12	8	19	61	13

Source: Eurostat.

Table M.20. Single market's importance to development of strategy. Pricing

Classification	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees				Percentage of turnover of enterprises expressing opinion			
	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know
EUR-12	12	24	43	21	12	25	48	15	12	25	49	14
By Member State												
België/Belgique	8	46	24	22	8	36	34	22	8	36	34	22
Danmark	6	24	58	12	10	35	48	8	12	36	45	7
BR Deutschland	2	14	64	21	5	18	66	11	5	17	66	11
Elláda	10	13	28	50	10	12	32	45	12	12	33	42
España	14	31	33	22	18	35	30	17	19	35	29	17
France	9	27	32	32	11	26	42	22	11	26	43	20
Ireland	21	31	35	12	19	32	40	9	19	32	41	8
Italia	24	31	39	6	24	29	42	6	24	29	41	6
Luxembourg	12	18	40	31	6	17	56	21	6	21	52	20
Nederland	20	17	29	34	17	25	28	30	16	25	30	29
Portugal	13	30	31	27	16	34	31	18	19	34	31	15
United Kingdom	9	16	50	25	14	23	46	16	15	24	46	15
By Manufacturing Sector												
Food, beverages and tobacco	12	23	41	23	13	26	43	18	12	26	44	17
Textiles, leather and furniture	13	28	40	18	11	27	45	16	10	25	49	15
Wood, paper and printing/publishing	9	20	42	29	7	19	51	23	8	18	54	20
Chemicals, rubber and plastics	11	24	47	18	13	27	47	13	14	28	45	12
Non-metallic mineral products	9	23	45	23	11	24	47	18	11	23	48	18
Metals and metal products	16	21	41	21	13	25	46	16	13	26	47	15
Machinery and equipment NEC	13	27	43	17	12	24	52	12	12	24	53	11
Electrical and optical machinery	10	25	51	14	13	28	49	10	14	28	48	10
Transport equipment	8	18	40	34	13	18	53	16	14	18	54	15
By Employment Size Class												
20-49	12	23	40	25	12	23	40	25	11	23	40	26
50-199	12	25	46	17	12	25	46	17	12	25	47	17
200-499	12	24	49	14	12	24	50	14	12	24	50	14
500-999	9	25	52	13	9	26	53	13	9	25	53	13
≥ 1,000	15	27	48	10	14	25	50	10	15	25	50	10

Source: Eurostat.

Table M.21. Single market's importance to development of strategy. Research and development of new products

Classification	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees				Percentage of turnover of enterprises expressing opinion			
	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know
EUR-12	11	23	43	23	12	24	47	17	12	24	48	16
By Member State												
België/Belgique	4	41	28	27	6	32	37	25	6	32	37	25
Danmark	4	21	56	19	9	28	52	10	12	29	50	9
BR Deutschland	6	18	55	21	12	24	52	12	12	24	52	12
Elláda	26	25	21	28	31	26	20	22	34	27	20	19
España	9	31	30	30	11	37	30	23	10	38	30	21
France	7	23	33	37	7	21	46	26	7	21	48	24
Ireland	13	28	44	16	11	29	47	14	11	29	46	15
Italia	23	27	46	3	22	25	49	4	22	23	49	5
Luxembourg	14	16	35	35	11	14	58	17	14	15	51	19
Nederland	10	20	28	41	12	26	35	27	12	24	36	28
Portugal	8	22	38	32	13	30	31	26	13	31	32	24
United Kingdom	8	13	51	28	11	18	51	19	11	19	52	18
By Manufacturing Sector												
Food, beverages and tobacco	9	25	39	27	11	25	43	21	11	26	44	20
Textiles, leather and furniture	11	25	44	21	12	22	48	18	11	19	53	17
Wood, paper and printing/publishing	6	15	47	32	6	16	50	28	7	15	53	25
Chemicals, rubber and plastics	12	27	40	21	12	26	49	14	12	25	50	13
Non-metallic mineral products	9	20	45	25	12	22	48	18	12	21	50	18
Metals and metal products	12	18	44	26	11	22	46	21	11	22	47	20
Machinery and equipment NEC	19	25	40	16	17	28	46	10	16	28	47	9
Electrical and optical machinery	12	25	48	14	17	30	45	9	17	29	45	9
Transport equipment	10	22	33	34	13	25	47	16	13	24	48	15
By Employment Size Class												
20-49	11	21	42	27	10	21	41	28	11	20	40	29
50-199	11	25	44	19	11	26	44	19	11	25	45	19
200-499	13	24	48	15	13	24	47	15	11	25	48	16
500-999	13	25	44	18	13	25	45	17	13	24	46	17
≥ 1,000	13	24	52	11	14	25	51	10	14	24	51	11

Source: Eurostat.

Table M.22. Single market's importance to development of strategy. Capacity of existing national production

Classification	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees				Percentage of turnover of enterprises expressing opinion			
	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know
EUR-12	8	20	47	25	9	22	50	18	9	23	50	18
<i>By Member State</i>												
België/Belgique	3	35	35	27	4	28	45	23	5	29	44	23
Danmark	3	23	57	17	7	26	59	9	10	27	56	7
BR Deutschland	4	22	59	14	8	31	51	10	9	31	50	10
Elláda	25	22	27	26	28	23	29	21	27	24	29	19
España	5	18	35	42	6	20	38	36	6	22	37	35
France	4	14	43	39	4	12	53	32	4	12	54	31
Ireland	14	22	45	19	17	22	49	12	17	23	50	11
Italia	20	29	41	9	19	27	47	7	19	27	48	6
Luxembourg	8	11	32	49	4	4	71	22	6	4	71	20
Nederland	9	13	33	44	7	14	45	34	6	15	45	34
Portugal	6	14	50	30	7	17	51	25	10	18	52	20
United Kingdom	4	12	56	29	8	17	56	19	9	18	55	18
<i>By Manufacturing Sector</i>												
Food, beverages and tobacco	11	22	38	30	10	24	44	22	9	26	44	21
Textiles, leather and furniture	7	23	47	22	7	18	55	20	7	18	56	18
Wood, paper and printing/publishing	4	16	44	36	4	17	51	28	4	18	53	25
Chemicals, rubber and plastics	6	26	44	23	11	27	47	15	11	27	48	14
Non-metallic mineral products	6	20	45	29	9	20	50	21	9	19	51	21
Metals and metal products	10	20	45	25	10	25	43	22	10	25	44	21
Machinery and equipment NEC	15	13	53	19	10	22	56	12	10	23	56	11
Electrical and optical machinery	7	18	58	18	10	25	51	14	11	25	50	14
Transport equipment	8	17	50	24	9	20	55	17	8	19	56	16
<i>By Employment Size Class</i>												
20-49	9	19	44	28	8	19	44	28	8	18	44	30
50-199	7	21	50	22	7	20	50	22	8	22	49	22
200-499	8	22	53	16	8	22	53	16	8	23	53	16
500-999	8	25	48	19	8	24	49	19	7	25	49	20
≥ 1,000	11	25	52	11	11	25	52	12	11	25	51	12

Source: Eurostat.

Table M.23. Single market's importance to development of strategy. Number of existing production plants

Classification	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees				Percentage of turnover of enterprises expressing opinion			
	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know
EUR-12	4	10	51	36	4	11	57	27	5	11	58	26
<i>By Member State</i>												
België/Belgique	1	31	35	33	2	22	44	32	1	23	43	32
Danmark	1	6	69	24	6	12	70	13	8	13	68	11
BR Deutschland	1	5	68	26	4	11	68	17	5	12	67	16
Elláda	9	16	40	34	9	16	46	29	10	15	47	28
España	1	3	20	76	1	3	23	73	1	4	24	72
France	2	7	42	49	1	4	58	37	1	4	60	35
Ireland	6	17	54	23	7	18	57	18	7	19	57	17
Italia	10	22	55	14	11	20	59	10	12	20	58	10
Luxembourg	0	11	32	56	0	4	70	26	0	4	70	26
Nederland	3	8	37	51	3	10	38	49	3	10	36	51
Portugal	1	7	51	40	2	10	53	35	2	11	55	32
United Kingdom	2	5	57	36	5	10	60	25	6	11	59	23
<i>By Manufacturing Sector</i>												
Food, beverages and tobacco	5	10	41	44	6	13	49	32	6	13	50	31
Textiles, leather and furniture	3	11	54	31	4	10	59	27	4	10	60	26
Wood, paper and printing/publishing	3	9	44	44	3	9	53	36	4	9	55	32
Chemicals, rubber and plastics	3	12	52	34	6	14	55	25	7	15	55	23
Non-metallic mineral products	3	8	57	32	5	9	59	28	5	8	59	28
Metals and metal products	4	10	51	35	5	11	53	32	5	11	53	30
Machinery and equipment NEC	4	8	48	40	4	11	61	24	4	11	62	23
Electrical and optical machinery	2	9	58	32	5	11	61	23	5	12	61	22
Transport equipment	5	7	55	33	3	7	67	24	2	6	69	22
<i>By Employment Size Class</i>												
20-49	3	10	48	39	3	10	48	39	3	10	46	41
50-199	4	9	53	34	4	8	53	35	5	8	52	35
200-499	3	11	61	26	3	11	61	25	2	11	62	25
500-999	5	13	54	27	5	13	55	27	5	13	53	28
≥ 1,000	7	13	63	17	6	12	65	17	7	12	64	17

Source: Eurostat.

Table M.24. Single market's importance to development of strategy. Establishment of plants in other EU states

Classification	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees				Percentage of turnover of enterprises expressing opinion			
	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know
EUR-12	2	7	50	40	4	12	54	30	5	13	54	29
By Member State												
België/Belgique	3	29	34	35	3	25	40	32	3	26	39	32
Danmark	2	6	60	32	7	9	66	18	9	9	66	16
BR Deutschland	1	4	68	27	4	13	67	16	4	14	67	15
Elláda	3	12	31	54	6	11	40	43	6	13	39	42
España	1	4	11	84	3	5	15	77	3	6	16	75
France	3	10	31	56	3	11	44	43	2	12	45	41
Ireland	3	13	50	34	7	16	54	23	7	16	54	22
Italia	4	10	72	15	6	14	69	11	6	16	67	11
Luxembourg	8	11	25	57	5	11	59	25	7	14	53	26
Nederland	4	9	36	51	5	11	37	46	4	13	33	50
Portugal	2	5	44	49	3	9	44	45	4	9	44	43
United Kingdom	2	6	51	41	6	11	52	31	6	13	52	29
By Manufacturing Sector												
Food, beverages and tobacco	2	10	42	46	4	12	48	36	4	12	49	35
Textiles, leather and furniture	3	7	57	33	4	8	56	32	4	8	57	30
Wood, paper and printing/publishing	2	6	43	50	4	8	47	41	5	9	50	36
Chemicals, rubber and plastics	3	10	46	41	5	12	52	30	6	13	52	29
Non-metallic mineral products	3	12	42	43	6	13	48	33	6	12	51	31
Metals and metal products	1	7	50	42	3	13	50	34	4	14	51	31
Machinery and equipment NEC	2	6	49	43	3	11	61	25	4	11	61	24
Electrical and optical machinery	2	7	60	31	4	11	63	22	5	11	62	22
Transport equipment	6	6	54	35	5	20	52	24	5	21	52	22
By Employment Size Class												
20-49	2	7	48	44	2	7	47	45	1	7	46	46
50-199	3	8	52	37	3	8	51	38	3	8	51	37
200-499	4	10	57	29	5	10	57	28	4	10	57	29
500-999	6	14	48	33	6	14	49	32	5	14	48	32
≥ 1,000	6	17	58	18	6	18	59	17	6	18	58	18

Source: Eurostat.

Table M.25. Single market's importance to development of strategy. Lean production methods

Classification	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees				Percentage of turnover of enterprises expressing opinion			
	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know
EUR-12	6	16	45	34	10	22	44	24	10	22	43	24
<i>By Member State</i>												
België/Belgique	2	28	22	48	6	24	33	37	5	26	33	37
Danmark	3	15	59	22	3	21	63	13	3	25	59	13
BR Deutschland	7	19	53	21	15	33	41	11	16	34	40	10
Elláda	31	21	22	26	35	25	20	20	35	27	20	18
España	4	16	27	52	4	21	29	46	5	22	29	45
France	4	13	34	49	6	12	44	38	6	11	45	38
Ireland	19	32	32	17	24	33	32	11	24	34	32	10
Italia	3	12	62	22	7	15	58	20	8	16	55	21
Luxembourg	2	15	19	64	1	14	50	35	1	20	49	30
Nederland	4	11	33	52	7	15	34	44	6	16	33	45
Portugal	13	28	27	32	14	31	32	23	18	31	32	20
United Kingdom	6	11	49	35	10	16	50	23	11	18	50	21
<i>By Manufacturing Sector</i>												
Food, beverages and tobacco	7	21	35	38	9	22	39	29	8	22	39	30
Textiles, leather and furniture	4	17	50	29	7	18	50	25	7	18	50	25
Wood, paper and printing/publishing	5	9	41	45	6	13	46	34	7	14	49	31
Chemicals, rubber and plastics	6	19	42	33	12	22	42	24	12	22	42	24
Non-metallic mineral products	6	10	47	37	10	11	50	29	8	12	52	28
Metals and metal products	6	13	48	33	10	22	41	26	10	22	42	25
Machinery and equipment NEC	5	15	46	34	14	24	43	19	14	24	43	18
Electrical and optical machinery	6	18	50	26	10	28	46	16	10	28	46	16
Transport equipment	7	21	34	38	14	28	39	19	14	28	40	19
<i>By Employment Size Class</i>												
20-49	4	12	45	39	4	13	44	39	3	13	42	41
50-199	7	20	44	29	7	20	44	29	6	19	45	30
200-499	11	20	50	19	11	20	49	19	10	19	50	20
500-999	12	24	39	25	12	24	39	24	10	24	40	26
≥ 1,000	15	26	43	16	15	28	42	15	15	28	41	16

Source: Eurostat.

Table M.26. Single market's importance to development of strategy. Penetration of markets in other EU states

Classification	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees				Percentage of turnover of enterprises expressing opinion			
	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know
EUR-12	10	22	43	25	11	26	46	17	11	26	46	16
<i>By Member State</i>												
België/Belgique	4	35	37	24	5	28	47	21	5	28	47	20
Danmark	8	33	47	12	9	33	50	8	9	38	46	7
BR Deutschland	8	31	45	16	12	32	48	8	11	32	48	8
Elláda	24	17	29	31	28	20	28	24	29	22	28	21
España	10	27	24	39	12	32	29	28	12	32	31	25
France	6	22	38	34	6	23	45	26	6	23	45	26
Ireland	16	32	37	15	16	31	40	13	16	31	41	12
Italia	14	13	61	11	15	15	63	7	17	14	62	6
Luxembourg	28	15	27	30	16	19	53	12	19	16	53	11
Nederland	10	20	26	44	11	26	34	29	11	25	34	30
Portugal	15	18	27	41	15	22	32	31	14	19	38	29
United Kingdom	9	19	42	29	12	25	42	21	11	26	43	20
<i>By Manufacturing Sector</i>												
Food, beverages and tobacco	13	25	35	27	11	31	37	21	11	32	38	20
Textiles, leather and furniture	11	22	48	20	12	24	47	17	11	25	49	15
Wood, paper and printing/publishing	6	15	43	36	8	18	46	27	8	18	50	24
Chemicals, rubber and plastics	11	23	40	26	11	26	45	18	12	25	46	17
Non-metallic mineral products	7	15	43	35	11	22	45	22	10	22	47	21
Metals and metal products	10	19	45	26	11	27	43	18	12	28	45	16
Machinery and equipment NEC	12	28	41	19	12	30	48	10	12	31	48	9
Electrical and optical machinery	11	33	39	17	14	31	44	11	14	31	45	11
Transport equipment	10	18	40	32	10	20	54	15	10	20	55	14
<i>By Employment Size Class</i>												
20-49	8	19	42	30	8	20	41	31	8	20	40	32
50-199	12	25	43	20	12	25	43	20	12	25	44	19
200-499	13	29	44	14	13	29	44	14	13	30	43	14
500-999	14	24	46	15	14	25	46	15	13	25	45	17
≥ 1,000	11	29	49	12	10	29	50	11	10	28	51	11

Source: Eurostat.

Table M.27. Single market's importance to development of strategy. Advertising in other EU markets

Classification	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees				Percentage of turnover of enterprises expressing opinion			
	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know
EUR-12	4	15	51	29	5	18	55	22	5	18	56	21
<i>By Member State</i>												
België/Belgique	0	29	40	30	1	23	48	28	1	24	46	28
Danmark	4	12	68	15	3	17	70	10	3	20	68	9
BR Deutschland	4	25	53	18	5	26	59	10	5	25	60	10
Elláda	15	15	30	41	15	18	36	31	15	19	38	28
España	4	14	28	53	5	18	32	45	5	18	33	44
France	2	14	42	42	2	14	50	35	1	13	51	35
Ireland	7	15	53	24	5	17	58	19	5	17	59	19
Italia	7	13	73	8	10	16	68	6	10	16	67	6
Luxembourg	15	15	35	36	11	17	58	14	12	17	59	12
Nederland	6	14	35	44	8	15	44	33	8	14	43	34
Portugal	5	12	32	51	5	17	40	39	5	15	44	36
United Kingdom	3	10	55	32	4	12	59	25	4	12	60	24
<i>By Manufacturing Sector</i>												
Food, beverages and tobacco	4	13	51	32	5	14	55	25	5	15	56	24
Textiles, leather and furniture	3	16	56	25	5	17	56	22	5	17	58	20
Wood, paper and printing/publishing	3	8	48	42	4	12	51	33	4	13	54	29
Chemicals, rubber and plastics	6	14	49	30	4	18	55	23	4	18	55	22
Non-metallic mineral products	4	15	45	36	5	17	54	24	5	16	56	23
Metals and metal products	4	13	53	30	4	19	54	24	4	19	56	21
Machinery and equipment NEC	9	22	51	19	7	25	57	11	7	25	57	11
Electrical and optical machinery	5	28	46	20	7	24	52	17	7	23	53	17
Transport equipment	5	12	46	37	4	17	60	19	4	17	60	19
<i>By Employment Size Class</i>												
20-49	3	14	50	33	3	14	49	34	3	13	50	34
50-199	6	18	51	25	6	18	51	25	6	18	51	25
200-499	5	19	56	20	5	19	56	20	5	18	57	20
500-999	6	19	57	18	6	19	58	18	6	17	58	18
≥ 1,000	5	19	60	16	5	21	59	16	4	20	60	16

Source: Eurostat.

Table M.28. Single market's importance to development of strategy. Distribution networks in other EU markets

Classification	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees				Percentage of turnover of enterprises expressing opinion			
	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know
EUR-12	6	16	49	29	8	22	49	21	8	22	50	20
<i>By Member State</i>												
België/Belgique	1	32	34	33	2	28	45	25	2	30	43	25
Danmark	9	20	55	16	6	25	57	11	6	28	55	11
BR Deutschland	6	18	60	16	8	29	54	9	7	29	54	9
Elláda	18	13	29	39	19	19	30	32	21	20	30	29
España	5	17	24	55	7	18	29	46	7	18	30	45
France	3	14	39	44	5	15	47	33	6	15	48	31
Ireland	11	20	45	23	10	26	46	18	10	28	45	17
Italia	7	17	68	8	13	18	63	6	14	18	61	6
Luxembourg	17	16	27	40	15	15	54	16	21	12	52	15
Nederland	7	14	32	48	11	16	40	34	11	18	37	34
Portugal	7	15	27	51	10	18	33	39	10	14	39	37
United Kingdom	5	12	49	33	8	20	47	24	9	21	47	23
<i>By Manufacturing Sector</i>												
Food, beverages and tobacco	6	16	46	32	9	19	48	24	8	20	49	23
Textiles, leather and furniture	7	18	48	27	8	21	49	22	8	20	52	20
Wood, paper and printing/publishing	3	10	44	43	6	15	47	32	6	15	51	28
Chemicals, rubber and plastics	8	16	45	31	10	23	46	21	11	23	46	20
Non-metallic mineral products	5	13	43	38	9	21	45	25	9	21	46	24
Metals and metal products	3	12	53	32	6	21	49	24	6	23	49	22
Machinery and equipment NEC	8	25	48	20	10	27	52	12	10	27	52	11
Electrical and optical machinery	8	20	55	17	11	28	47	15	11	28	46	15
Transport equipment	3	13	59	25	5	19	58	18	5	20	58	17
<i>By Employment Size Class</i>												
20-49	4	13	49	34	4	13	48	35	4	13	49	34
50-199	8	20	48	25	8	20	47	25	7	20	48	25
200-499	11	22	47	20	11	22	48	20	11	21	48	20
500-999	9	25	50	16	9	25	50	16	9	25	51	16
≥ 1,000	10	26	50	15	9	26	51	14	9	25	51	14

Source: Eurostat.

Table M.29. Single market's importance to development of strategy. Pan-European labelling

Classification	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees				Percentage of turnover of enterprises expressing opinion			
	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know
EUR-12	6	16	47	30	9	21	48	22	10	22	47	21
By Member State												
België/Belgique	2	32	31	35	3	27	42	28	4	29	41	26
Danmark	4	18	60	18	9	24	52	14	13	26	48	13
BR Deutschland	3	16	62	19	6	22	60	12	6	23	60	12
Elláda	19	21	20	40	21	26	22	32	23	27	22	28
España	7	20	25	48	10	28	27	36	11	31	26	32
France	3	14	37	46	6	17	38	39	6	18	37	39
Ireland	11	20	42	27	14	27	41	18	14	30	41	16
Italia	11	14	66	9	16	18	58	8	19	19	55	7
Luxembourg	11	17	33	39	11	18	50	20	15	24	45	16
Nederland	5	17	34	44	9	18	41	32	11	22	35	31
Portugal	6	17	25	51	7	21	31	40	9	20	34	37
United Kingdom	7	12	45	36	11	21	44	24	12	22	44	22
By Manufacturing Sector												
Food, beverages and tobacco	11	26	37	27	14	29	35	21	14	30	36	20
Textiles, leather and furniture	6	15	50	29	8	19	50	23	8	19	53	21
Wood, paper and printing/publishing	5	10	43	41	7	13	48	33	7	13	51	28
Chemicals, rubber and plastics	10	19	45	26	13	27	42	18	14	28	40	17
Non-metallic mineral products	4	15	42	38	6	21	46	27	6	20	49	25
Metals and metal products	3	12	51	34	5	16	51	27	5	17	54	25
Machinery and equipment NEC	6	16	50	28	8	20	54	18	8	19	55	17
Electrical and optical machinery	7	17	55	20	10	24	49	17	11	24	47	17
Transport equipment	4	17	51	28	6	18	53	23	6	18	54	23
By Employment Size Class												
20-49	5	13	47	35	5	13	47	35	5	14	46	34
50-199	9	18	48	26	9	18	48	26	9	19	48	24
200-499	10	25	44	20	10	25	44	20	11	26	44	20
500-999	10	23	45	22	10	24	46	20	11	24	44	20
≥ 1,000	11	26	48	15	10	24	51	15	10	24	50	16

Source: Eurostat.

Table M.30. Single market's importance to development of strategy. Purchase of raw materials from other EU markets

Classification	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees				Percentage of turnover of enterprises expressing opinion			
	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know
EUR-12	10	24	48	19	11	31	45	13	11	31	45	13
By Member State												
België/Belgique	4	46	31	20	5	31	49	15	4	31	50	15
Danmark	9	32	51	9	7	34	54	5	8	39	49	4
BR Deutschland	5	27	57	10	9	40	45	6	9	41	44	6
Elláda	36	24	24	15	35	26	25	14	37	26	25	12
España	10	25	35	31	12	34	33	21	13	35	32	21
France	6	22	43	29	6	21	51	22	6	21	53	21
Ireland	20	32	40	8	19	31	44	6	18	31	45	6
Italia	16	20	60	4	18	26	52	4	20	28	48	4
Luxembourg	21	18	36	25	15	11	64	10	19	13	57	11
Nederland	8	22	34	37	8	21	45	27	8	22	42	27
Portugal	11	24	37	28	14	34	34	19	19	36	30	16
United Kingdom	8	20	44	27	11	27	44	18	12	28	44	17
By Manufacturing Sector												
Food, beverages and tobacco	12	24	40	23	13	33	38	15	12	34	39	15
Textiles, leather and furniture	10	24	50	16	10	29	48	13	10	30	48	12
Wood, paper and printing/publishing	11	23	39	28	11	24	45	20	11	26	46	17
Chemicals, rubber and plastics	11	27	43	20	12	30	44	14	13	29	45	13
Non-metallic mineral products	7	20	43	31	7	23	50	21	6	23	52	19
Metals and metal products	9	20	52	19	10	27	48	15	11	27	48	14
Machinery and equipment NEC	9	25	52	15	9	36	47	8	9	37	46	8
Electrical and optical machinery	11	24	54	11	11	31	48	10	11	31	47	10
Transport equipment	9	27	51	13	10	37	43	10	10	36	44	10
By Employment Size Class												
20-49	9	19	49	22	9	19	49	23	9	20	47	24
50-199	11	29	44	16	10	30	44	16	11	29	44	16
200-499	13	29	48	10	13	29	48	10	12	29	48	10
500-999	11	35	45	9	11	35	46	9	11	34	45	9
≥ 1,000	12	34	44	10	11	35	43	10	11	35	43	10

Source: Eurostat.

Table M.32. Single market's importance to development of strategy. Purchase of business services from other EU markets

Classification	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees				Percentage of turnover of enterprises expressing opinion			
	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know
EUR-12	2	7	60	31	2	11	65	22	3	12	65	20
By Member State												
België/Belgique	2	31	38	29	2	22	55	21	2	22	55	21
Danmark	3	5	70	22	1	8	77	14	1	7	79	13
BR Deutschland	0	6	72	21	1	13	74	12	0	14	74	11
Elláda	17	19	35	29	19	28	32	20	20	31	31	17
España	3	9	32	55	4	16	38	42	4	18	40	39
France	1	4	51	44	1	6	61	33	1	6	63	31
Ireland	5	13	62	20	3	14	69	13	3	14	70	13
Italia	3	7	81	9	7	11	75	7	8	12	73	7
Luxembourg	10	20	34	36	12	13	61	15	15	10	57	18
Nederland	2	14	37	47	4	10	52	34	5	10	50	35
Portugal	2	7	43	48	4	14	44	37	6	17	44	33
United Kingdom	1	4	59	37	2	8	64	27	2	9	64	25
By Manufacturing Sector												
Food, beverages and tobacco	2	6	57	35	3	10	63	24	3	10	65	23
Textiles, leather and furniture	2	8	62	28	2	11	64	23	2	11	66	21
Wood, paper and printing/publishing	2	6	52	41	2	8	57	32	2	9	61	28
Chemicals, rubber and plastics	2	10	56	32	4	12	61	23	5	12	61	22
Non-metallic mineral products	3	5	51	41	3	8	61	29	2	7	64	27
Metals and metal products	3	6	59	32	2	7	64	26	2	8	65	24
Machinery and equipment NEC	2	8	70	20	1	12	73	14	1	12	73	14
Electrical and optical machinery	1	7	71	21	3	15	69	13	4	15	68	13
Transport equipment	3	7	50	41	2	16	65	16	2	16	67	15
By Employment Size Class												
20-49	2	6	57	35	2	6	57	35	2	6	56	36
50-199	2	8	62	28	2	8	62	28	2	8	61	29
200-499	2	10	67	20	2	10	67	20	2	9	68	20
500-999	3	10	66	20	4	10	66	20	4	10	66	20
≥ 1,000	3	16	68	12	3	17	68	11	3	17	68	12

Source: Eurostat.

	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees				Percentage of turnover of enterprises expressing opinion			
Classification	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know
EUR-12	1	6	58	35	2	10	62	25	2	11	63	25
By Member State												
België/Belgique	2	29	35	34	2	23	49	26	2	23	50	25
Danmark	3	5	61	31	2	12	63	22	2	15	59	24
BR Deutschland	0	6	71	23	1	13	73	13	1	13	73	13
Elláda	16	16	30	38	22	22	30	26	24	24	30	22
España	2	7	27	64	3	12	35	50	4	14	37	45
France	1	5	44	50	1	7	51	41	1	7	52	40
Ireland	2	8	64	27	2	9	72	17	2	10	72	16
Italia	1	6	83	10	5	10	76	9	6	10	74	10
Luxembourg	3	15	35	47	7	12	59	22	10	9	59	22
Nederland	0	7	36	57	1	10	49	40	3	10	47	40
Portugal	3	7	41	49	4	13	46	36	6	15	47	32
United Kingdom	1	2	59	39	1	4	64	31	1	5	65	29
By Manufacturing Sector												
Food, beverages and tobacco	2	8	53	38	2	9	59	30	2	9	61	29
Textiles, leather and furniture	1	7	62	29	2	9	63	26	2	8	65	25
Wood, paper and printing/publishing	1	4	50	45	1	8	53	37	1	10	56	33
Chemicals, rubber and plastics	3	6	54	37	3	10	58	29	3	10	59	28
Non-metallic mineral products	3	5	50	41	4	8	58	30	4	8	60	28
Metals and metal products	1	6	57	36	1	7	63	29	2	7	64	27
Machinery and equipment NEC	1	5	66	27	2	10	71	17	2	10	71	16
Electrical and optical machinery	1	6	67	26	3	12	69	17	3	12	68	17
Transport equipment	1	8	49	42	3	17	60	20	3	17	60	19
By Employment Size Class												
20-49	1	5	55	39	1	5	54	39	1	5	54	40
50-199	2	8	60	31	2	8	60	31	2	8	60	31
200-499	3	8	66	24	3	8	66	24	3	7	66	24
500-999	2	9	64	25	2	9	64	25	2	8	64	26
≥ 1,000	3	15	66	16	3	16	65	16	3	16	65	17

Source: Eurostat.

Table M.34. Single market's importance to development of strategy. Direct investment in other companies

Classification	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees				Percentage of turnover of enterprises expressing opinion			
	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know
EUR-12	2	7	48	43	4	12	50	34	5	12	50	33
<i>By Member State</i>												
België/Belgique	2	29	24	44	3	23	36	37	4	23	36	37
Danmark	1	8	56	35	6	12	61	21	9	11	61	19
BR Deutschland	1	6	65	28	3	14	62	20	4	15	62	20
Elláda	6	10	32	52	9	16	34	41	11	18	33	38
España	1	4	11	84	1	7	18	74	1	7	21	71
France	2	5	25	68	4	10	36	50	4	11	37	48
Ireland	5	10	43	42	4	11	48	37	5	12	48	35
Italia	3	8	80	9	7	13	70	10	9	13	66	12
Luxembourg	7	11	24	58	15	8	49	27	19	4	46	31
Nederland	2	13	29	57	7	12	33	48	7	12	32	49
Portugal	1	5	30	64	2	10	36	52	3	11	37	48
United Kingdom	2	5	48	46	4	8	51	37	5	8	51	36
<i>By Manufacturing Sector</i>												
Food, beverages and tobacco	1	6	44	48	3	10	47	39	3	11	48	38
Textiles, leather and furniture	2	7	52	39	2	9	54	35	2	9	56	33
Wood, paper and printing/publishing	2	6	40	52	3	9	43	44	4	10	46	40
Chemicals, rubber and plastics	3	8	47	43	5	13	46	35	6	14	47	34
Non-metallic mineral products	4	6	45	45	7	13	47	33	7	13	49	31
Metals and metal products	1	5	48	46	4	10	50	37	5	11	51	34
Machinery and equipment NEC	1	8	48	43	2	10	58	29	3	10	59	28
Electrical and optical machinery	2	7	56	34	4	19	50	27	4	20	49	27
Transport equipment	2	7	56	35	9	11	54	26	10	11	54	25
<i>By Employment Size Class</i>												
20-49	1	5	47	47	1	5	46	48	1	5	46	48
50-199	2	8	50	40	2	8	50	40	2	8	49	41
200-499	4	10	52	34	4	10	52	34	5	10	51	34
500-999	5	16	49	31	5	15	49	30	6	16	48	31
≥ 1,000	6	17	51	25	7	17	53	23	7	16	53	24

Source: Eurostat.

Table M.36. Single market's importance to development of strategy. Co-operation agreements with other companies

Classification	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees				Percentage of turnover of enterprises expressing opinion			
	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know
EUR-12	3	11	42	44	5	13	47	35	6	13	47	34
<i>By Member State</i>												
België/Belgique	3	30	21	47	5	21	31	43	5	22	31	42
Danmark	4	12	84	0	3	10	87	0	3	9	88	0
BR Deutschland	2	8	63	27	4	13	63	20	4	13	62	20
Elláda	8	6	25	61	10	11	26	53	12	11	26	50
España	2	6	9	83	3	8	13	76	4	8	15	73
France	2	8	25	65	3	12	35	51	3	11	37	49
Ireland	5	15	41	39	4	12	48	37	4	13	48	35
Italia	4	21	64	11	10	23	58	9	13	22	56	9
Luxembourg	8	10	23	59	5	8	57	30	6	4	57	32
Nederland	5	13	25	58	6	14	34	46	5	14	31	50
Portugal	3	7	22	69	3	11	31	55	4	13	32	51
United Kingdom	3	5	39	53	5	8	42	44	5	9	42	44
<i>By Manufacturing Sector</i>												
Food, beverages and tobacco	3	10	38	49	3	11	43	42	3	11	45	40
Textiles, leather and furniture	1	15	43	41	2	12	49	37	2	11	54	34
Wood, paper and printing/publishing	2	10	36	52	3	9	41	47	3	10	43	44
Chemicals, rubber and plastics	4	9	39	49	7	12	44	37	8	12	44	35
Non-metallic mineral products	2	6	44	48	3	13	45	39	3	13	47	37
Metals and metal products	5	7	42	45	6	11	46	37	7	12	47	34
Machinery and equipment NEC	3	14	44	39	3	16	53	29	3	16	53	28
Electrical and optical machinery	4	11	50	35	7	17	48	27	7	18	47	28
Transport equipment	3	9	53	34	9	14	49	29	9	14	48	29
<i>By Employment Size Class</i>												
20-49	2	11	40	47	2	10	40	48	2	9	41	47
50-199	4	10	44	42	4	10	44	42	4	11	43	42
200-499	4	12	50	34	5	12	49	34	5	13	48	34
500-999	3	14	47	36	4	14	48	35	4	14	46	37
≥ 1,000	7	16	49	28	8	16	51	25	8	15	51	26

Source: Eurostat.

Table M.37. Any change in competition levels in the domestic market. Competitors: domestically owned enterprises

Classification	Percentage of enterprises expressing opinion			Percentage of enterprises offering opinion expressed in number of salaried employees			Percentage of turnover of enterprises expressing opinion		
	Increase	No change	Decrease	Increase	No change	Decrease	Increase	No change	Decrease
EUR-12	25	64	11	19	70	10	19	71	10
<i>By Member State</i>									
België/Belgique	14	82	5	11	85	4	10	87	3
Danmark	16	78	5	11	75	14	10	69	21
BR Deutschland	20	72	8	14	78	7	14	79	7
Elláda	41	48	12	40	51	9	41	52	7
España	33	45	21	27	53	20	26	54	20
France	20	67	13	13	75	12	13	76	11
Ireland	36	59	5	27	67	5	27	69	5
Italia	32	54	14	28	60	12	28	60	12
Luxembourg	15	81	4	5	90	5	4	89	7
Nederland	23	74	3	18	77	5	18	75	7
Portugal	29	64	7	27	62	11	28	59	13
United Kingdom	22	71	7	23	66	10	24	65	11
<i>By Manufacturing Sector</i>									
Food, beverages and tobacco	24	61	15	25	61	14	24	62	13
Textiles, leather and furniture	24	62	14	21	65	13	20	66	13
Wood, paper and printing/publishing	30	61	9	27	63	10	28	62	10
Chemicals, rubber and plastics	27	64	9	18	72	9	18	73	9
Non-metallic mineral products	27	61	12	19	72	9	16	76	9
Metals and metal products	22	69	9	17	71	11	16	71	13
Machinery and equipment NEC	27	65	8	18	74	7	18	75	7
Electrical and optical machinery	19	72	10	16	73	11	16	72	11
Transport equipment	32	54	14	13	81	6	12	84	5
<i>By Employment Size Class</i>									
20-49	27	61	11	27	62	11	27	63	11
50-199	23	67	11	23	66	11	23	66	11
200-499	20	68	12	20	68	12	20	68	12
500-999	16	73	10	16	74	10	17	73	10
≥ 1,000	16	74	10	14	78	8	15	77	9

Source: Eurostat.

Table M.38. Any change in competition levels in the domestic market. Competitors: other EU-owned enterprises

Classification	Percentage of enterprises expressing opinion			Percentage of enterprises offering opinion expressed in number of salaried employees			Percentage of turnover of enterprises expressing opinion		
	Increase	No change	Decrease	Increase	No change	Decrease	Increase	No change	Decrease
EUR-12	39	59	2	43	55	3	42	55	3
By Member State									
België/Belgique	37	62	1	38	60	2	37	61	2
Danmark	32	66	2	28	66	6	30	61	9
BR Deutschland	51	48	1	49	50	1	47	52	1
Elláda	46	45	8	53	40	7	53	40	7
España	48	48	4	52	44	4	53	43	5
France	52	46	2	45	52	4	41	55	3
Ireland	50	49	1	45	54	1	44	55	1
Italia	23	74	3	28	68	4	32	64	4
Luxembourg	46	52	1	27	61	12	32	56	12
Nederland	41	58	1	52	47	1	55	44	1
Portugal	31	65	3	42	54	4	49	48	3
United Kingdom	27	70	2	37	60	4	38	58	4
By Manufacturing Sector									
Food, beverages and tobacco	46	51	3	48	49	3	47	50	3
Textiles, leather and furniture	35	63	3	41	55	3	45	52	3
Wood, paper and printing/publishing	39	58	3	44	55	2	43	55	2
Chemicals, rubber and plastics	44	53	2	43	54	3	41	55	4
Non-metallic mineral products	32	65	3	39	57	4	38	58	4
Metals and metal products	41	58	1	49	49	2	49	50	2
Machinery and equipment NEC	37	61	2	39	58	3	39	58	3
Electrical and optical machinery	33	64	3	45	52	4	45	51	4
Transport equipment	46	52	2	33	65	2	31	67	2
By Employment Size Class									
20-49	36	63	2	36	62	2	39	60	2
50-199	42	55	3	42	55	3	42	55	3
200-499	46	50	4	46	50	4	46	50	4
500-999	49	48	3	48	49	3	43	53	4
≥ 1,000	46	52	2	43	55	2	42	56	2

Source: Eurostat.

Table M.39. Any change in competition levels in the domestic market. Competitors: non-EU-owned enterprises

Classification	Percentage of enterprises expressing opinion			Percentage of enterprises offering opinion expressed in number of salaried employees			Percentage of turnover of enterprises expressing opinion		
	Increase	No change	Decrease	Increase	No change	Decrease	Increase	No change	Decrease
EUR-12	25	74	2	32	66	2	32	66	2
<i>By Member State</i>									
België/Belgique	24	75	0	27	73	1	24	76	0
Danmark	23	76	1	19	81	0	16	84	0
BR Deutschland	36	63	1	34	65	1	32	67	1
Elláda	26	66	8	33	61	6	31	63	6
España	27	71	2	32	66	2	32	66	2
France	32	66	2	42	55	4	42	55	4
Ireland	21	78	1	25	73	2	24	74	3
Italia	16	82	2	26	71	3	29	68	3
Luxembourg	15	83	1	48	51	0	42	58	0
Nederland	21	76	3	30	68	1	30	69	1
Portugal	16	82	3	26	72	2	26	72	2
United Kingdom	18	80	2	26	71	3	26	71	3
<i>By Manufacturing Sector</i>									
Food, beverages and tobacco	18	79	3	17	80	3	17	80	3
Textiles, leather and furniture	28	71	1	36	63	1	38	61	1
Wood, paper and printing/publishing	20	78	2	22	76	2	23	75	2
Chemicals, rubber and plastics	20	78	2	28	70	2	28	69	3
Non-metallic mineral products	16	82	2	28	70	2	29	69	2
Metals and metal products	25	74	1	34	64	2	35	62	2
Machinery and equipment NEC	28	70	2	29	68	3	29	68	3
Electrical and optical machinery	38	61	2	39	58	3	40	57	4
Transport equipment	24	75	1	47	52	0	49	51	0
<i>By Employment Size Class</i>									
20-49	22	76	1	23	76	1	23	76	2
50-199	27	71	2	27	71	2	25	73	2
200-499	28	69	3	28	69	3	25	71	4
500-999	35	63	3	33	64	3	30	67	3
≥ 1,000	39	58	3	41	57	2	41	57	2

Source: Eurostat.

Table M.40. Any change in competition levels in the domestic market. Price competition: domestically owned enterprises

Classification	Percentage of enterprises expressing opinion			Percentage of enterprises offering opinion expressed in number of salaried employees			Percentage of turnover of enterprises expressing opinion		
	Increase	No change	Decrease	Increase	No change	Decrease	Increase	No change	Decrease
EUR-12	44	51	4	43	54	3	43	54	3
<i>By Member State</i>									
België/Belgique	32	68	0	24	76	1	23	77	1
Danmark	37	63	0	31	68	1	31	68	1
BR Deutschland	45	54	2	44	55	1	44	55	1
Elláda	38	49	12	43	48	9	44	47	8
España	53	39	8	50	42	7	51	42	7
France	46	49	4	44	53	3	46	51	3
Ireland	47	52	1	38	61	1	39	60	1
Italia	46	46	8	41	51	7	40	52	8
Luxembourg	15	80	6	32	66	2	28	70	2
Nederland	46	54	0	45	55	0	44	55	0
Portugal	54	43	3	51	47	3	49	48	3
United Kingdom	34	63	3	43	55	2	44	54	2
<i>By Manufacturing Sector</i>									
Food, beverages and tobacco	54	41	5	55	42	3	54	43	3
Textiles, leather and furniture	43	53	4	42	55	3	40	57	3
Wood, paper and printing/publishing	47	49	3	45	52	3	46	52	3
Chemicals, rubber and plastics	43	51	5	42	55	3	41	56	3
Non-metallic mineral products	44	53	3	43	55	2	40	58	2
Metals and metal products	41	52	7	39	55	5	38	56	6
Machinery and equipment NEC	45	52	3	40	57	3	40	57	3
Electrical and optical machinery	37	58	5	43	53	4	43	53	4
Transport equipment	50	47	3	42	57	1	41	58	1
<i>By Employment Size Class</i>									
20-49	45	50	5	45	50	5	45	50	5
50-199	44	52	4	44	52	4	44	52	4
200-499	45	52	3	45	52	3	45	52	3
500-999	42	55	3	41	57	3	40	57	3
≥ 1,000	43	55	2	42	56	2	43	55	2

Source: Eurostat.

Table M.41. Any change in competition levels in the domestic market . Price competition: other EU-owned enterprises

Classification	Percentage of enterprises expressing opinion			Percentage of enterprises offering opinion expressed in number of salaried employees			Percentage of turnover of enterprises expressing opinion		
	Increase	No change	Decrease	Increase	No change	Decrease	Increase	No change	Decrease
EUR-12	41	55	4	52	45	3	53	45	3
<i>By Member State</i>									
België/Belgique	46	53	1	50	49	1	49	50	1
Danmark	42	57	1	41	57	1	43	56	1
BR Deutschland	56	44	0	61	38	0	60	40	0
Elláda	41	48	11	52	38	10	52	39	9
España	46	48	7	52	40	8	54	38	8
France	55	42	3	60	38	2	59	39	1
Ireland	55	44	1	52	46	2	52	47	2
Italia	22	68	10	32	59	9	36	55	9
Luxembourg	48	49	4	58	41	1	57	42	1
Nederland	53	47	0	67	33	0	65	35	0
Portugal	36	61	3	50	48	3	54	44	2
United Kingdom	27	71	2	42	55	2	45	53	2
<i>By Manufacturing Sector</i>									
Food, beverages and tobacco	45	50	5	52	46	3	51	46	3
Textiles, leather and furniture	36	60	5	44	52	4	48	50	3
Wood, paper and printing/publishing	41	56	3	46	51	2	46	52	2
Chemicals, rubber and plastics	49	47	4	54	43	2	54	44	2
Non-metallic mineral products	32	65	3	43	54	2	42	55	2
Metals and metal products	40	55	4	55	41	3	56	41	4
Machinery and equipment NEC	42	54	5	53	44	3	53	44	3
Electrical and optical machinery	40	56	4	58	38	4	59	37	4
Transport equipment	51	46	3	54	44	2	54	44	2
<i>By Employment Size Class</i>									
20-49	35	60	5	35	60	5	38	58	5
50-199	48	49	3	48	49	3	47	50	3
200-499	56	40	4	56	40	4	55	40	4
500-999	56	42	3	54	43	2	50	48	2
≥ 1,000	61	38	1	60	38	1	59	39	1

Source: Eurostat.

Table M.42. Any change in competition levels in the domestic market. Price competition: non-EU-owned enterprises

Classification	Percentage of enterprises expressing opinion			Percentage of enterprises offering opinion expressed in number of salaried employees			Percentage of turnover of enterprises expressing opinion		
	Increase	No change	Decrease	Increase	No change	Decrease	Increase	No change	Decrease
EUR-12	29	67	4	38	59	3	38	59	3
<i>By Member State</i>									
België/Belgique	31	69	1	38	61	1	35	64	1
Danmark	26	73	1	26	72	2	25	73	1
BR Deutschland	41	58	1	43	56	1	41	58	1
Elláda	29	63	8	37	55	8	35	58	7
España	29	65	6	37	57	7	37	57	6
France	35	61	4	47	51	3	45	53	2
Ireland	27	70	2	33	65	2	31	67	2
Italia	23	70	8	28	65	7	30	64	6
Luxembourg	25	74	1	53	47	0	48	52	0
Nederland	26	71	3	41	56	2	38	60	2
Portugal	24	75	1	35	64	2	32	66	1
United Kingdom	22	76	2	33	64	2	34	63	2
<i>By Manufacturing Sector</i>									
Food, beverages and tobacco	20	75	5	20	77	3	20	78	3
Textiles, leather and furniture	35	61	3	43	54	3	44	53	3
Wood, paper and printing/publishing	22	76	2	23	74	3	24	72	4
Chemicals, rubber and plastics	26	71	3	39	59	2	40	58	2
Non-metallic mineral products	16	79	4	32	65	3	34	63	3
Metals and metal products	29	66	5	44	53	3	46	52	3
Machinery and equipment NEC	32	63	5	36	60	4	36	60	4
Electrical and optical machinery	43	54	3	50	47	3	51	46	3
Transport equipment	32	67	1	48	50	2	49	50	1
<i>By Employment Size Class</i>									
20-49	26	69	4	27	69	4	26	70	4
50-199	32	66	3	32	66	3	30	67	3
200-499	37	59	4	37	59	4	33	62	5
500-999	44	54	2	42	55	2	39	59	2
≥ 1,000	47	51	2	49	49	2	48	51	1

Source: Eurostat.

Table M.43. Any change in competition levels in the domestic market. Quality competition: domestically owned enterprises

Classification	Percentage of enterprises expressing opinion			Percentage of enterprises offering opinion expressed in number of salaried employees			Percentage of turnover of enterprises expressing opinion		
	Increase	No change	Decrease	Increase	No change	Decrease	Increase	No change	Decrease
EUR-12	33	64	3	32	66	2	32	65	2
<i>By Member State</i>									
België/Belgique	11	87	2	9	90	1	9	90	1
Danmark	18	82	1	17	83	0	18	82	0
BR Deutschland	38	60	2	32	67	1	31	68	1
Elláda	34	59	8	36	58	6	37	59	5
España	40	56	4	41	56	3	41	56	3
France	32	65	3	35	62	2	37	61	3
Ireland	37	63	1	28	70	1	30	69	1
Italia	38	58	4	37	59	5	37	58	5
Luxembourg	10	87	2	4	96	0	4	96	0
Nederland	20	78	1	22	77	1	20	78	2
Portugal	40	58	2	38	59	3	33	63	3
United Kingdom	21	77	2	27	70	4	29	67	4
<i>By Manufacturing Sector</i>									
Food, beverages and tobacco	34	59	7	39	58	3	38	59	3
Textiles, leather and furniture	36	62	2	35	63	2	33	64	2
Wood, paper and printing/publishing	31	68	1	29	70	1	31	68	1
Chemicals, rubber and plastics	32	64	4	31	67	2	31	67	2
Non-metallic mineral products	40	59	1	35	63	2	33	65	2
Metals and metal products	24	71	4	28	69	3	29	67	3
Machinery and equipment NEC	28	70	2	28	69	3	29	69	3
Electrical and optical machinery	43	53	3	33	65	2	32	66	2
Transport equipment	36	61	3	31	67	3	30	67	3
<i>By Employment Size Class</i>									
20-49	34	63	3	34	63	3	32	64	4
50-199	31	66	2	32	66	3	32	66	3
200-499	31	66	3	31	66	3	31	65	3
500-999	31	66	3	30	67	3	30	67	3
≥ 1,000	33	65	2	33	66	2	33	65	2

Source: Eurostat.

Table M.44. Any change in competition levels in the domestic market. Quality competition: other EU-owned enterprises

Classification	Percentage of enterprises expressing opinion			Percentage of enterprises offering opinion expressed in number of salaried employees			Percentage of turnover of enterprises expressing opinion		
	Increase	No change	Decrease	Increase	No change	Decrease	Increase	No change	Decrease
EUR-12	29	69	2	35	63	2	36	62	2
<i>By Member State</i>									
België/Belgique	18	80	2	21	78	2	20	78	1
Danmark	22	77	1	27	72	1	32	67	1
BR Deutschland	38	61	1	38	61	1	36	63	1
Elláda	38	57	5	44	51	5	43	52	5
España	37	61	3	43	55	2	44	54	2
France	33	65	3	41	56	2	41	56	3
Ireland	49	51	1	44	55	0	44	56	0
Italia	25	73	2	32	65	4	36	60	4
Luxembourg	40	57	2	25	75	1	29	70	1
Nederland	17	80	4	30	68	2	31	67	2
Portugal	30	68	2	38	60	2	39	60	2
United Kingdom	19	78	2	28	70	2	30	68	2
<i>By Manufacturing Sector</i>									
Food, beverages and tobacco	29	66	5	36	60	3	37	60	3
Textiles, leather and furniture	27	72	1	33	66	1	34	65	1
Wood, paper and printing/publishing	26	73	2	29	69	1	31	68	1
Chemicals, rubber and plastics	36	62	2	36	63	1	37	63	1
Non-metallic mineral products	23	74	3	33	65	2	32	66	2
Metals and metal products	26	71	3	36	62	2	36	62	2
Machinery and equipment NEC	34	65	1	36	62	3	36	62	3
Electrical and optical machinery	32	65	2	39	60	2	39	59	2
Transport equipment	39	58	2	38	60	3	37	60	3
<i>By Employment Size Class</i>									
20-49	27	71	2	27	71	2	27	70	3
50-199	32	66	2	32	66	2	32	66	2
200-499	36	62	2	36	62	2	36	61	3
500-999	37	61	2	37	61	2	33	64	2
≥ 1,000	42	56	1	41	57	1	42	57	2

Source: Eurostat.

Table M.45. Any change in competition levels in the domestic market. Quality competition: non-EU-owned enterprises

Classification	Percentage of enterprises expressing opinion			Percentage of enterprises offering opinion expressed in number of salaried employees			Percentage of turnover of enterprises expressing opinion		
	Increase	No change	Decrease	Increase	No change	Decrease	Increase	No change	Decrease
EUR-12	18	79	3	25	73	2	26	72	2
By Member State									
België/Belgique	9	90	1	14	85	1	14	86	1
Danmark	9	90	1	15	84	1	17	82	1
BR Deutschland	23	75	2	27	72	1	27	72	1
Elláda	22	72	5	26	68	6	24	71	5
España	18	77	5	25	71	4	26	69	4
France	19	77	4	31	66	3	31	65	4
Ireland	22	77	1	23	76	1	22	78	1
Italia	20	79	1	26	72	2	29	69	2
Luxembourg	18	80	1	48	52	0	42	58	0
Nederland	7	89	4	15	83	2	12	86	2
Portugal	17	82	2	21	77	2	19	79	2
United Kingdom	14	83	3	22	76	2	23	75	2
By Manufacturing Sector									
Food, beverages and tobacco	14	83	3	17	81	3	17	81	3
Textiles, leather and furniture	23	74	3	26	71	3	27	70	2
Wood, paper and printing/publishing	12	86	2	15	83	2	17	81	2
Chemicals, rubber and plastics	20	78	2	26	73	2	27	71	2
Non-metallic mineral products	14	83	3	22	76	2	23	75	2
Metals and metal products	15	81	4	26	72	3	27	70	2
Machinery and equipment NEC	19	78	3	22	75	3	22	75	3
Electrical and optical machinery	24	75	2	32	67	1	33	66	1
Transport equipment	22	77	1	36	62	2	37	61	2
By Employment Size Class									
20-49	16	81	3	16	81	3	15	82	3
50-199	20	77	3	20	77	3	20	78	3
200-499	23	74	3	24	74	3	22	75	3
500-999	25	73	2	24	74	2	22	76	2
≥ 1,000	34	65	1	35	64	1	35	64	1

Source: Eurostat.

Table M.46.1. The extent to which the implementation of the SMP has affected – Unit cost of typical or average product (sub table 1)

Classification	Percentage of enterprises expressing opinion									
	Reduction in unit costs				No change	Increase in unit costs				Don't know
	More than 6%	3% to 6%	1% to 2%	All reduction		All increase	1% to 2%	3% to 6%	More than 6%	
EUR-12	5	5	5	15	53	14	4	6	4	18
<i>By Member State</i>										
België/Belgique	4	2	4	10	26	9	4	1	4	55
Danmark	1	5	3	9	50	8	0	6	2	32
BR Deutschland	4	4	6	14	74	6	1	4	1	7
Elláda	5	9	12	26	56	18	2	5	11	0
España	2	7	9	18	51	27	4	12	11	3
France	8	10	5	23	62	8	3	4	1	6
Ireland	6	11	12	29	32	12	2	6	4	27
Italia	4	5	4	13	36	27	8	9	10	26
Luxembourg	7	12	8	27	50	16	6	8	2	6
Nederland	3	5	6	14	45	9	2	6	1	31
Portugal	1	7	2	10	50	10	1	3	6	29
United Kingdom	4	1	3	8	50	11	3	4	4	31
<i>By Manufacturing Sector</i>										
Food, beverages and tobacco	5	8	5	18	51	17	6	5	6	14
Textiles, leather and furniture	2	6	5	13	55	15	4	6	5	17
Wood, paper and printing/publishing	3	4	4	11	62	9	1	3	5	18
Chemicals, rubber and plastics	5	5	5	15	53	13	2	6	5	19
Non-metallic mineral products	7	2	5	14	53	13	1	7	5	20
Metals and metal products	6	8	5	19	51	12	3	6	3	19
Machinery and equipment NEC	4	3	4	11	44	25	8	8	9	20
Electrical and optical machinery	5	4	7	16	56	14	4	7	3	14
Transport equipment	4	4	7	15	41	11	1	7	3	31
<i>By Employment Size Class</i>										
20-49	4	5	3	12	51	17	4	7	6	21
50-199	4	5	7	16	56	13	3	6	4	15
200-499	5	9	8	22	57	9	3	4	2	12
500-999	5	7	9	21	53	8	3	3	2	18
≥ 1,000	6	8	12	26	55	7	3	3	1	12

Source: Eurostat.

Table M.46.2. The extent to which the implementation of the SMP has affected – Unit cost of typical or average product (sub table 2)

Classification	Percentage of enterprises offering opinion expressed in number of salaried employees									
	Reduction in unit costs				No change	Increase in unit costs				Don't know
	More than 6%	3% to 6%	1% to 2%	All Reduction		All Increase	1% to 2%	3% to 6%	More than 6%	
EUR-12	5	7	8	20	55	10	3	4	3	15
By Member State										
België/Belgique	4	4	11	19	28	7	3	2	2	47
Danmark	2	6	5	13	55	7	1	4	2	25
BR Deutschland	5	7	9	21	69	4	2	2	0	5
Elláda	5	12	18	35	47	16	3	5	8	1
España	5	10	12	27	48	23	4	11	8	2
France	7	8	8	23	63	6	2	3	1	9
Ireland	7	13	16	36	32	10	3	4	3	22
Italia	4	8	8	20	40	21	6	8	7	21
Luxembourg	2	4	3	9	70	11	3	7	1	11
Nederland	7	4	7	18	46	6	2	3	1	31
Portugal	3	13	7	23	41	11	1	4	6	24
United Kingdom	4	4	7	15	47	12	4	5	3	27
By Manufacturing Sector										
Food, beverages and tobacco	2	9	8	19	48	16	6	7	3	15
Textiles, leather and furniture	2	7	6	15	57	12	3	6	3	15
Wood, paper and printing/publishing	3	5	5	13	62	10	2	3	5	17
Chemicals, rubber and plastics	4	5	10	19	60	6	1	3	2	13
Non-metallic mineral products	8	2	10	20	57	8	1	4	3	16
Metals and metal products	6	9	6	21	55	9	3	4	2	15
Machinery and equipment NEC	6	5	8	19	54	14	4	6	4	14
Electrical and optical machinery	7	9	10	26	54	8	4	3	1	11
Transport equipment	7	9	13	29	48	7	1	4	2	17
By Employment Size Class										
20-49	4	5	3	12	51	17	4	7	6	21
50-199	5	5	7	17	56	13	3	6	4	14
200-499	5	9	8	22	57	9	3	4	2	11
500-999	5	7	9	21	53	8	3	3	2	18
≥ 1,000	6	8	12	26	56	6	3	3	0	12

Source: Eurostat.

Table M.46.3. The extent to which the implementation of the SMP has affected – Unit cost of typical or average product (sub table 3)

Classification	Percentage of <i>turnover</i> of enterprises expressing opinion									
	Reduction in unit costs				No change	Increase in unit costs				Don't know
	More than 6%	3% to 6%	1% to 2%	All reduction		All increase	1% to 2%	3% to 6%	More than 6%	
EUR-12	5	7	9	21	54	10	3	4	3	15
By Member State										
België/Belgique	4	5	11	20	27	6	3	2	1	47
Danmark	1	6	6	13	54	6	1	3	2	26
BR Deutschland	5	8	9	22	68	4	2	2	0	5
Elláda	5	14	19	38	45	16	3	5	8	1
España	5	11	12	28	47	23	5	11	7	2
France	7	7	8	22	63	6	3	3	0	10
Ireland	7	13	17	37	30	11	4	4	3	21
Italia	4	9	10	23	39	18	5	7	6	20
Luxembourg	2	3	4	9	62	13	4	9	0	16
Nederland	6	5	7	18	47	4	2	2	0	30
Portugal	6	13	12	31	39	13	1	5	7	18
United Kingdom	4	4	8	16	45	12	4	5	3	27
By Manufacturing Sector										
Food, beverages and tobacco	2	10	9	21	48	17	7	7	3	15
Textiles, leather and furniture	2	7	6	15	61	10	2	6	2	13
Wood, paper and printing/publishing	2	4	5	11	61	9	2	3	4	18
Chemicals, rubber and plastics	5	5	10	20	59	6	1	3	2	14
Non-metallic mineral products	7	2	10	19	58	7	1	4	2	16
Metals and metal products	6	9	7	22	55	8	3	3	2	15
Machinery and equipment NEC	6	5	8	19	54	13	4	5	4	14
Electrical and optical machinery	7	9	10	26	53	9	5	3	1	11
Transport equipment	6	9	13	28	49	5	1	3	1	17
By Employment Size Class										
20-49	4	4	3	11	50	15	4	6	5	22
50-199	4	5	7	16	55	14	3	6	5	14
200-499	4	8	8	20	57	9	4	4	1	12
500-999	4	7	9	20	50	9	4	3	2	21
≥ 1,000	6	9	12	27	55	6	3	3	0	12

Source: Eurostat.

Table M.47. Importance in changing unit costs. Production process

Classification	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees				Percentage of turnover of enterprises expressing opinion			
	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know
EUR-12	10	12	33	44	12	12	32	44	12	13	33	42
By Member State												
België/Belgique	13	9	39	39	11	9	46	34	9	9	47	34
Danmark	1	9	4	86	4	6	5	85	4	6	5	85
BR Deutschland	3	7	9	81	6	9	12	74	6	9	12	73
Elláda	11	14	19	56	15	16	21	48	16	15	22	47
España	8	15	42	35	10	19	39	32	11	19	38	31
France	10	16	52	22	16	17	49	19	16	17	48	20
Ireland	15	21	34	31	21	18	31	31	22	18	31	30
Italia	20	17	37	26	19	16	44	21	18	16	46	20
Luxembourg	18	15	66	0	17	8	75	0	24	9	67	0
Nederland	10	19	72	0	18	15	68	0	17	16	68	0
Portugal	11	4	6	79	10	7	17	66	10	11	22	57
United Kingdom	9	7	37	46	12	11	36	41	13	11	35	41
By Manufacturing Sector												
Food, beverages and tobacco	9	14	35	42	10	17	34	39	10	18	34	38
Textiles, leather and furniture	11	11	36	41	10	11	35	43	9	11	35	45
Wood, paper and printing/publishing	7	11	37	46	9	10	35	46	10	10	36	43
Chemicals, rubber and plastics	11	11	31	48	9	13	31	47	10	13	34	44
Non-metallic mineral products	7	9	35	50	9	13	31	47	8	13	32	47
Metals and metal products	14	12	31	42	13	12	32	43	13	12	33	41
Machinery and equipment NEC	12	13	28	47	11	12	28	49	11	12	28	49
Electrical and optical machinery	8	14	34	43	13	14	33	40	13	15	33	39
Transport equipment	9	18	25	48	18	10	28	43	19	10	29	42
By Employment Size Class												
20-49	10	12	34	44	10	12	33	45	9	12	34	45
50-199	11	13	34	43	10	13	34	43	11	13	36	41
200-499	11	13	31	45	11	13	31	44	11	14	32	44
500-999	14	10	29	47	13	10	30	47	12	11	30	46
≥ 1,000	12	15	32	41	13	13	31	43	13	14	32	41

Source: Eurostat.

Classification	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees				Percentage of turnover of enterprises expressing opinion			
	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know
EUR-12	7	12	37	44	7	14	35	44	7	14	36	43
By Member State												
België/Belgique	2	13	45	40	3	12	51	34	2	12	51	35
Danmark	1	5	7	86	1	4	9	86	1	3	10	86
BR Deutschland	2	6	12	81	2	6	18	74	2	6	19	73
Elláda	11	13	20	56	13	17	22	48	14	17	23	46
España	4	15	47	34	5	19	44	32	6	20	44	31
France	8	17	54	21	9	21	51	19	9	21	50	20
Ireland	12	20	36	31	13	19	36	32	13	19	37	31
Italia	15	12	47	26	16	16	47	21	16	17	47	20
Luxembourg	9	11	80	0	6	11	82	0	7	17	76	0
Nederland	14	19	67	0	13	20	66	0	11	21	68	0
Portugal	4	6	11	79	5	10	20	66	6	12	25	57
United Kingdom	6	11	36	47	8	15	36	41	8	16	35	41
By Manufacturing Sector												
Food, beverages and tobacco	8	10	40	42	7	13	40	39	7	13	41	38
Textiles, leather and furniture	3	11	44	41	5	11	42	43	5	10	41	44
Wood, paper and printing/publishing	2	9	44	46	3	9	41	47	4	9	42	45
Chemicals, rubber and plastics	8	15	29	48	8	13	32	47	8	13	35	44
Non-metallic mineral products	7	9	35	49	5	15	33	47	4	15	34	47
Metals and metal products	11	10	38	42	6	13	37	43	5	14	39	42
Machinery and equipment NEC	11	14	29	46	11	14	27	49	11	14	26	49
Electrical and optical machinery	14	16	28	43	9	18	33	40	9	19	34	39
Transport equipment	8	16	29	48	6	17	34	43	6	18	34	42
By Employment Size Class												
20-49	7	10	38	44	7	10	37	45	8	10	37	45
50-199	8	13	36	43	8	13	36	43	8	14	38	40
200-499	7	13	35	45	7	13	36	44	7	13	37	44
500-999	7	15	32	47	7	15	32	47	6	15	33	46
≥ 1,000	7	16	37	41	7	15	35	43	7	16	37	41

Source: Eurostat.

Source: Eurostat.

Table M.49. Importance in changing unit costs. Distribution costs

Classification	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees				Percentage of turnover of enterprises expressing opinion			
	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know
EUR-12	6	15	35	44	6	18	32	44	6	18	33	42
<i>By Member State</i>												
België/Belgique	5	17	39	39	4	24	39	34	4	24	37	34
Danmark	2	8	3	87	2	8	5	85	2	8	5	85
BR Deutschland	1	9	9	81	2	13	11	74	3	13	11	73
Elláda	10	13	21	56	11	17	24	48	12	17	25	46
España	4	26	36	34	6	27	36	31	6	27	36	30
France	6	19	54	21	6	21	55	19	6	21	53	19
Ireland	16	28	26	31	20	28	20	31	21	28	20	30
Italia	10	16	47	26	11	20	48	21	10	22	48	20
Luxembourg	12	17	71	0	13	7	79	0	19	9	72	0
Nederland	4	20	75	0	10	21	69	0	9	23	68	0
Portugal	8	9	4	79	7	18	9	66	8	21	14	57
United Kingdom	7	13	34	47	9	16	34	42	9	16	33	42
<i>By Manufacturing Sector</i>												
Food, beverages and tobacco	6	18	35	41	9	20	32	39	9	21	33	38
Textiles, leather and furniture	6	16	37	41	6	18	33	43	6	18	32	44
Wood, paper and printing/publishing	7	10	38	45	6	14	34	46	7	14	36	44
Chemicals, rubber and plastics	7	17	28	48	8	17	28	47	8	17	31	44
Non-metallic mineral products	9	13	27	50	6	19	28	47	5	19	29	47
Metals and metal products	7	13	38	42	4	18	34	44	4	19	34	42
Machinery and equipment NEC	4	20	31	46	4	19	28	49	4	19	28	49
Electrical and optical machinery	7	17	34	42	8	16	36	40	7	17	37	39
Transport equipment	3	14	34	48	4	19	34	43	4	20	34	43
<i>By Employment Size Class</i>												
20-49	6	14	36	44	6	14	35	45	6	14	35	45
50-199	6	17	35	43	6	16	35	43	6	17	37	40
200-499	7	19	29	45	7	19	30	44	7	19	30	43
500-999	5	17	31	47	6	16	31	47	6	17	31	46
≥ 1,000	7	21	31	41	6	20	31	43	7	20	32	41

Source: Eurostat.

Table M.50. Importance in changing unit costs. Marketing costs

Classification	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees				Percentage of turnover of enterprises expressing opinion			
	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know
EUR-12	3	12	41	44	4	12	40	44	4	12	41	42
By Member State												
België/Belgique	5	10	46	39	3	11	52	34	3	11	51	34
Danmark	0	3	9	87	1	3	12	85	1	2	12	85
BR Deutschland	2	7	10	81	2	8	16	74	2	9	17	73
Elláda	9	15	20	56	9	15	28	48	11	15	28	46
España	2	14	50	33	3	14	51	32	4	14	51	31
France	3	16	59	22	4	14	62	19	4	15	61	20
Ireland	6	18	44	32	8	17	43	32	8	17	44	31
Italia	4	15	56	26	7	14	58	21	7	14	59	20
Luxembourg	8	22	69	0	9	11	80	0	12	13	75	0
Nederland	1	14	85	0	3	15	82	0	4	15	81	0
Portugal	4	12	5	79	3	17	15	66	4	17	22	57
United Kingdom	3	10	40	47	3	14	42	41	3	14	41	41
By Manufacturing Sector												
Food, beverages and tobacco	4	15	39	42	5	15	41	39	4	16	42	38
Textiles, leather and furniture	3	13	42	41	4	14	39	43	4	13	39	44
Wood, paper and printing/publishing	3	10	42	45	3	11	39	46	4	11	41	44
Chemicals, rubber and plastics	4	10	37	49	5	9	38	48	5	10	41	44
Non-metallic mineral products	3	9	38	50	4	8	41	47	4	8	41	47
Metals and metal products	2	11	45	42	2	11	43	44	2	11	45	42
Machinery and equipment NEC	4	15	36	46	5	13	33	49	5	13	34	49
Electrical and optical machinery	3	11	42	44	3	14	43	40	3	14	44	39
Transport equipment	2	11	40	48	2	12	43	43	2	12	43	42
By Employment Size Class												
20-49	3	12	41	45	2	12	40	46	2	12	40	46
50-199	4	13	40	43	4	12	41	43	4	12	44	40
200-499	4	13	37	45	5	14	38	44	5	12	39	44
500-999	4	11	39	47	4	11	39	47	3	12	39	46
≥ 1,000	4	13	42	41	3	12	41	43	3	13	43	41

Source: Eurostat.

Table M.52. Importance in changing unit costs. Banking costs

Classification	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees				Percentage of turnover of enterprises expressing opinion			
	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know
EUR-12	6	11	40	44	4	10	42	44	3	10	45	43
By Member State												
België/Belgique	3	9	49	39	2	10	54	34	1	10	54	34
Danmark	1	3	9	87	1	4	10	85	1	4	10	86
BR Deutschland	1	5	13	81	1	5	20	74	1	5	21	73
Elláda	11	17	17	56	14	18	20	48	15	18	21	46
España	13	17	37	33	9	20	40	31	8	21	41	30
France	5	14	61	20	2	11	68	18	2	10	69	19
Ireland	5	15	49	31	3	14	52	31	3	12	54	31
Italia	10	16	49	26	10	17	53	21	9	16	55	20
Luxembourg	12	15	74	0	3	7	91	0	2	9	90	0
Nederland	4	13	83	0	3	16	82	0	2	15	83	0
Portugal	8	4	9	79	6	12	17	66	7	15	21	57
United Kingdom	3	6	45	46	3	6	50	42	3	5	50	42
By Manufacturing Sector												
Food, beverages and tobacco	3	8	47	42	2	9	49	40	2	9	51	38
Textiles, leather and furniture	6	12	41	40	5	11	41	43	5	11	40	44
Wood, paper and printing/publishing	6	10	39	45	4	11	39	46	4	12	41	44
Chemicals, rubber and plastics	4	11	37	48	2	8	42	48	2	8	45	45
Non-metallic mineral products	4	6	40	50	2	10	40	48	1	10	41	47
Metals and metal products	9	10	39	42	6	9	42	43	6	8	45	41
Machinery and equipment NEC	7	13	34	46	3	10	38	49	3	10	38	49
Electrical and optical machinery	5	11	41	42	3	10	47	39	3	10	48	39
Transport equipment	6	11	35	48	4	12	41	44	4	11	42	43
By Employment Size Class												
20-49	7	10	39	44	7	10	38	45	6	10	39	45
50-199	4	12	41	43	4	11	42	43	4	11	45	40
200-499	3	11	41	45	3	12	41	45	3	11	42	44
500-999	2	8	44	46	2	8	43	47	2	7	45	46
≥ 1,000	2	8	48	41	3	9	46	43	3	9	47	41

Source: Eurostat.

Table M.53. Importance in changing unit costs. Insurance costs

Classification	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees				Percentage of turnover of enterprises expressing opinion			
	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know
EUR-12	3	11	42	44	2	9	45	44	2	8	47	43
By Member State												
België/Belgique	3	9	49	39	2	10	55	34	2	10	54	34
Danmark	1	3	9	88	1	2	11	86	1	2	11	86
BR Deutschland	1	5	13	81	0	5	21	74	0	4	22	73
Elláda	6	12	26	56	10	14	28	48	10	14	30	46
España	4	15	47	34	2	16	50	33	2	16	51	32
France	2	14	63	21	1	8	72	18	1	7	73	19
Ireland	9	16	44	30	10	15	44	31	10	15	46	30
Italia	6	16	52	26	6	16	58	21	5	15	60	20
Luxembourg	4	18	78	0	1	9	90	0	1	11	89	0
Nederland	4	11	85	0	2	9	88	0	2	10	88	0
Portugal	4	4	13	79	2	8	24	66	2	8	33	57
United Kingdom	3	7	44	47	2	8	48	42	3	7	48	42
By Manufacturing Sector												
Food, beverages and tobacco	2	8	49	41	1	7	53	39	1	7	54	38
Textiles, leather and furniture	3	13	42	41	3	11	43	43	3	10	44	44
Wood, paper and printing/publishing	3	10	41	46	2	9	42	47	2	9	44	44
Chemicals, rubber and plastics	2	11	39	48	1	7	43	48	1	8	46	45
Non-metallic mineral products	7	5	38	50	3	5	45	47	2	5	46	47
Metals and metal products	6	9	42	42	3	8	45	43	3	8	48	42
Machinery and equipment NEC	2	14	38	46	1	9	41	49	1	9	41	49
Electrical and optical machinery	2	11	44	42	1	8	51	40	1	8	52	39
Transport equipment	3	11	38	48	2	11	43	43	2	11	44	43
By Employment Size Class												
20-49	4	12	40	44	4	12	39	45	3	11	41	45
50-199	3	10	45	43	3	10	45	43	3	10	48	40
200-499	1	9	45	45	1	9	45	44	1	8	47	44
500-999	2	6	45	47	2	6	45	47	2	6	46	46
≥ 1,000	1	7	51	42	1	7	48	43	1	8	50	42

Source: Eurostat.

Table M.54. Importance in changing unit costs. Other cost sources

Classification	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees				Percentage of turnover of enterprises expressing opinion			
	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know
EUR-12	2	2	24	71	3	2	28	67	3	2	29	66
<i>By Member State</i>												
België/Belgique	2	1	58	40	2	1	63	34	2	1	62	35
Danmark	0	0	0	100	1	0	0	98	1	0	0	98
BR Deutschland	1	3	15	81	1	2	23	74	1	1	24	73
Elláda	6	1	37	56	5	1	47	47	5	1	50	45
España	3	2	23	72	3	2	23	71	3	3	24	70
France	4	1	31	64	6	2	29	63	7	2	29	63
Ireland	3	2	28	67	4	1	28	67	4	2	28	66
Italia	2	3	4	91	3	4	5	89	3	4	5	88
Luxembourg	5	0	95	0	1	0	99	0	1	0	99	0
Nederland	2	2	96	0	3	2	95	0	3	3	95	0
Portugal	0	3	15	81	1	4	27	69	1	4	35	60
United Kingdom	3	3	39	55	4	2	39	55	4	2	37	57
<i>By Manufacturing Sector</i>												
Food, beverages and tobacco	4	2	23	71	3	1	33	63	3	1	33	63
Textiles, leather and furniture	2	1	21	76	2	2	24	72	2	3	24	71
Wood, paper and printing/publishing	2	1	30	66	2	1	29	68	3	1	27	69
Chemicals, rubber and plastics	3	4	23	71	3	2	26	70	3	2	26	69
Non-metallic mineral products	1	1	20	78	3	2	24	71	3	2	24	71
Metals and metal products	2	3	28	67	3	4	28	64	3	5	28	64
Machinery and equipment NEC	1	7	23	69	1	4	23	72	1	3	23	73
Electrical and optical machinery	3	2	24	71	4	2	34	59	4	2	35	59
Transport equipment	3	1	25	71	6	1	28	65	6	1	29	64
<i>By Employment Size Class</i>												
20-49	2	3	22	73	2	3	22	73	2	3	23	72
50-199	3	2	27	68	3	2	27	68	3	2	28	67
200-499	2	2	30	66	2	2	30	66	2	2	30	65
500-999	3	4	28	64	3	4	28	65	3	4	28	66
≥ 1,000	4	2	30	64	4	2	30	64	4	2	30	64

Source: Eurostat.

Table M.55. Single market legislation as it affects your own firm or sector. The SMP has been a success for your firm

Classification	Percentage of enterprises expressing opinion			Percentage of enterprises offering opinion expressed in number of salaried employees			Percentage of turnover of enterprises expressing opinion		
	Agree	No opinion	Disagree	Agree	No opinion	Disagree	Agree	No opinion	Disagree
EUR-12	33	40	27	40	35	25	42	34	24
<i>By Member State</i>									
België/Belgique	13	66	22	21	53	26	22	53	26
Danmark	33	41	27	34	35	31	38	33	29
BR Deutschland	41	40	18	49	31	20	50	30	20
Elláda	42	39	19	52	31	16	56	30	15
España	38	23	40	50	17	33	53	15	32
France	20	41	38	28	38	34	31	36	33
Ireland	46	38	15	50	34	16	51	33	16
Italia	54	23	23	64	19	17	67	19	14
Luxembourg	21	42	37	25	32	43	25	37	38
Nederland	17	64	19	16	53	31	16	53	31
Portugal	12	54	34	20	43	36	21	39	40
United Kingdom	16	59	25	24	51	24	26	49	25
<i>By Manufacturing Sector</i>									
Food, beverages and tobacco	34	38	28	38	35	27	40	34	26
Textiles, leather and furniture	31	37	32	34	38	29	35	38	27
Wood, paper and printing/publishing	21	50	29	24	47	28	27	45	28
Chemicals, rubber and plastics	39	37	25	44	34	22	45	33	21
Non-metallic mineral products	29	51	20	35	45	20	34	45	21
Metals and metal products	31	40	28	38	36	27	41	34	25
Machinery and equipment NEC	40	36	24	47	34	19	47	34	19
Electrical and optical machinery	45	32	24	48	27	25	48	27	26
Transport equipment	27	52	21	47	28	24	48	27	25
<i>By Employment Size Class</i>									
20-49	30	42	28	29	43	28	29	45	26
50-199	36	37	27	36	37	27	38	36	26
200-499	40	35	25	41	35	24	43	35	23
500-999	38	38	24	39	37	24	38	38	24
≥ 1,000	46	31	23	49	28	23	49	28	23

Source: Eurostat.

Table M.56. Single market legislation as it affects your own firm or sector. The SMP has been a success for your sector in your country

Classification	Percentage of enterprises expressing opinion			Percentage of enterprises offering opinion expressed in number of salaried employees			Percentage of turnover of enterprises expressing opinion		
	Agree	No opinion	Disagree	Agree	No opinion	Disagree	Agree	No opinion	Disagree
EUR-12	25	44	31	26	42	32	27	41	32
<i>By Member State</i>									
België/Belgique	9	67	24	13	60	27	13	60	27
Danmark	23	50	27	23	41	37	28	38	34
BR Deutschland	21	49	30	23	45	31	23	46	31
Elláda	37	35	27	41	33	25	46	31	23
España	25	38	37	35	30	35	38	27	35
France	12	41	47	17	39	44	19	37	43
Ireland	32	49	19	35	46	19	36	45	19
Italia	56	22	22	57	20	22	58	20	22
Luxembourg	10	41	49	3	39	57	5	39	57
Nederland	8	68	24	8	59	33	9	59	33
Portugal	8	47	44	13	39	47	14	36	49
United Kingdom	12	63	25	17	56	27	18	54	28
<i>By Manufacturing Sector</i>									
Food, beverages and tobacco	25	39	36	26	40	34	27	40	33
Textiles, leather and furniture	26	41	33	25	40	35	25	41	34
Wood, paper and printing/publishing	19	49	32	18	48	34	20	47	33
Chemicals, rubber and plastics	26	43	31	31	40	29	32	40	28
Non-metallic mineral products	28	49	23	26	45	28	26	45	29
Metals and metal products	22	45	32	22	43	35	23	42	35
Machinery and equipment NEC	27	48	26	27	46	27	26	46	27
Electrical and optical machinery	35	36	29	27	40	33	27	40	33
Transport equipment	18	55	27	29	39	32	30	38	32
<i>By Employment Size Class</i>									
20-49	26	45	29	25	46	29	24	47	29
50-199	23	42	35	23	43	34	24	42	34
200-499	26	41	33	26	41	32	28	41	31
500-999	21	44	35	22	43	35	22	46	33
≥ 1,000	29	41	30	30	39	32	31	38	31

Source: Eurostat.

Table M.57. Single market legislation as it affects your own firm or sector. The SMP has been a success for your sector in the EU

Classification	Percentage of enterprises expressing opinion			Percentage of enterprises offering opinion expressed in number of salaried employees			Percentage of turnover of enterprises expressing opinion		
	Agree	No opinion	Disagree	Agree	No opinion	Disagree	Agree	No opinion	Disagree
EUR-12	29	51	20	34	45	22	34	44	21
<i>By Member State</i>									
België/Belgique	13	72	15	18	57	25	19	57	24
Danmark	16	65	18	26	46	28	32	42	27
BR Deutschland	35	48	17	41	41	18	41	41	18
Elláda	25	58	17	35	49	16	38	49	13
España	24	60	15	35	51	14	38	49	13
France	18	49	33	21	45	34	22	46	32
Ireland	33	53	14	38	48	14	40	47	13
Italia	55	27	18	60	23	16	61	24	16
Luxembourg	14	43	42	17	35	48	22	30	47
Nederland	13	71	16	16	56	28	16	56	29
Portugal	10	63	27	18	51	31	21	49	31
United Kingdom	14	68	18	20	59	22	20	57	23
<i>By Manufacturing Sector</i>									
Food, beverages and tobacco	30	51	19	30	51	19	30	51	19
Textiles, leather and furniture	31	47	22	31	43	25	32	44	24
Wood, paper and printing/publishing	19	59	22	22	54	24	25	52	24
Chemicals, rubber and plastics	27	52	20	33	47	20	34	46	20
Non-metallic mineral products	30	56	14	27	54	19	27	53	20
Metals and metal products	24	57	19	32	47	21	36	43	21
Machinery and equipment NEC	32	45	23	41	40	19	41	39	19
Electrical and optical machinery	41	40	19	41	37	22	41	38	21
Transport equipment	25	59	16	38	38	24	38	37	25
<i>By Employment Size Class</i>									
20-49	27	54	19	26	55	19	24	57	19
50-199	31	47	22	32	47	21	33	46	21
200-499	31	46	23	31	46	23	32	47	22
500-999	31	44	25	31	44	25	30	47	24
≥ 1,000	39	40	21	41	37	22	41	38	22

Source: Eurostat.

Table M.58. Single market legislation as it affects your own firm or sector. The SMP has been successful in eliminating obstacles to EU trade in your sector

Classification	Percentage of enterprises expressing opinion			Percentage of enterprises offering opinion expressed in number of salaried employees			Percentage of turnover of enterprises expressing opinion		
	Agree	No opinion	Disagree	Agree	No opinion	Disagree	Agree	No opinion	Disagree
EUR-12	41	39	20	44	34	22	44	34	22
<i>By Member State</i>									
België/Belgique	24	63	12	36	48	16	37	48	15
Danmark	35	37	28	39	28	33	43	27	30
BR Deutschland	36	47	18	43	40	18	43	40	17
Elláda	47	38	15	54	31	16	56	30	14
España	64	21	14	73	15	12	75	13	12
France	35	37	28	36	34	30	35	34	30
Ireland	64	28	8	64	25	12	64	25	11
Italia	50	22	28	53	18	28	55	17	28
Luxembourg	24	38	38	16	28	55	21	25	54
Nederland	28	58	15	32	44	23	32	45	23
Portugal	44	39	17	58	29	13	61	25	14
United Kingdom	26	60	14	33	46	21	33	44	22
<i>By Manufacturing Sector</i>									
Food, beverages and tobacco	46	36	18	45	36	19	45	37	19
Textiles, leather and furniture	43	35	21	46	33	21	44	35	21
Wood, paper and printing/publishing	33	48	19	33	45	23	33	44	24
Chemicals, rubber and plastics	41	39	20	47	29	24	47	29	25
Non-metallic mineral products	31	48	21	38	40	21	38	41	21
Metals and metal products	36	45	19	41	37	22	42	35	23
Machinery and equipment NEC	43	35	21	46	33	22	45	33	22
Electrical and optical machinery	51	30	19	50	29	21	50	29	21
Transport equipment	31	38	30	43	34	22	43	35	22
<i>By Employment Size Class</i>									
20-49	38	42	20	38	43	19	37	43	19
50-199	44	36	20	44	36	20	44	36	21
200-499	43	31	26	43	32	26	42	32	26
500-999	46	33	21	45	34	21	44	36	20
≥ 1,000	47	30	22	47	31	22	46	31	22

Source: Eurostat.

Table M.59. Single market legislation as it affects your own firm or sector. The SMP has been successful in creating a genuine single market¹

Classification	Percentage of enterprises expressing opinion			Percentage of enterprises offering opinion expressed in number of salaried employees			Percentage of turnover of enterprises expressing opinion		
	Agree	No opinion	Disagree	Agree	No opinion	Disagree	Agree	No opinion	Disagree
EUR-11	23	43	35	25	41	34	25	41	34
<i>By Member State</i>									
België/Belgique	14	67	20	22	58	21	24	57	19
Danmark	21	38	41	20	31	49	23	28	49
BR Deutschland	30	51	19	34	45	21	34	45	21
Elláda	20	46	33	28	44	28	29	44	27
España	28	37	35	34	29	38	34	28	38
France	11	44	45	13	40	47	13	42	45
Italia	35	19	46	33	19	47	32	19	48
Luxembourg	9	42	49	14	31	55	15	30	55
Nederland	9	62	30	16	47	38	15	48	36
Portugal	15	44	42	27	36	37	30	32	38
United Kingdom	12	60	28	12	54	34	12	52	36
<i>By Manufacturing Sector</i>									
Food, beverages and tobacco	23	40	38	21	43	35	21	44	35
Textiles, leather and furniture	27	37	36	27	38	35	27	40	33
Wood, paper and printing/publishing	16	48	36	17	50	33	16	50	33
Chemicals, rubber and plastics	23	46	31	27	38	35	27	37	37
Non-metallic mineral products	17	53	30	23	47	29	24	48	29
Metals and metal products	19	51	30	24	44	32	25	42	34
Machinery and equipment NEC	24	40	36	29	39	32	29	39	31
Electrical and optical machinery	29	37	34	30	35	36	29	35	36
Transport equipment	17	38	45	23	40	36	23	41	36
<i>By Employment Size Class</i>									
20-49	23	43	34	22	44	34	21	45	34
50-199	21	44	35	21	44	34	22	44	34
200-499	24	39	37	34	39	37	23	40	37
500-999	27	39	34	27	40	34	24	43	33
≥ 1,000	27	39	34	29	38	33	28	38	34

¹ EUR-11 = EUR-12 excluding Ireland.

Source: Eurostat.

Table M.60. Single market legislation as it affects your own firm or sector. Additional measures are needed to eliminate obstacles to EU trade

Classification	Percentage of enterprises expressing opinion			Percentage of enterprises offering opinion expressed in number of salaried employees			Percentage of turnover of enterprises expressing opinion		
	Agree	No opinion	Disagree	Agree	No opinion	Disagree	Agree	No opinion	Disagree
EUR-12	27	61	12	30	58	12	32	56	12
<i>By Member State</i>									
België/Belgique	18	76	6	34	58	8	35	58	7
Danmark	32	49	19	39	39	22	40	37	23
BR Deutschland	17	74	9	20	71	9	20	71	9
Elláda	21	73	5	27	64	9	27	62	10
España	23	59	18	28	47	25	32	44	25
France	29	59	12	33	54	12	35	53	12
Ireland	27	67	7	33	60	6	34	61	6
Italia	52	29	19	58	23	19	60	21	19
Luxembourg	32	41	27	40	52	8	40	53	7
Nederland	23	70	7	25	62	13	25	60	16
Portugal	9	83	8	14	70	16	18	64	18
United Kingdom	14	79	8	27	65	8	29	63	9
<i>By Manufacturing Sector</i>									
Food, beverages and tobacco	31	59	10	36	54	10	37	53	11
Textiles, leather and furniture	27	63	10	29	58	13	30	58	12
Wood, paper and printing/publishing	22	67	11	22	64	14	25	60	14
Chemicals, rubber and plastics	26	62	12	33	54	13	35	52	12
Non-metallic mineral products	25	66	9	26	62	13	26	61	13
Metals and metal products	23	63	14	24	63	13	26	61	14
Machinery and equipment NEC	28	51	20	30	55	15	30	55	15
Electrical and optical machinery	29	59	12	31	58	10	32	57	10
Transport equipment	41	54	6	35	53	12	35	53	12
<i>By Employment Size Class</i>									
20-49	26	62	12	25	63	12	26	62	12
50-199	28	60	12	27	60	13	30	58	12
200-499	30	57	13	30	57	13	32	55	12
500-999	30	55	15	28	56	16	29	56	15
≥ 1,000	36	52	12	35	54	12	36	53	12

Source: Eurostat.

Table M.61. Single market legislation as it affects your own firm or sector. Additional measures are needed in this sector to create a genuine single market¹

Classification	Percentage of enterprises expressing opinion			Percentage of enterprises offering opinion expressed in number of salaried employees			Percentage of turnover of enterprises expressing opinion		
	Agree	No opinion	Disagree	Agree	No opinion	Disagree	Agree	No opinion	Disagree
EUR-11	25	61	14	28	58	14	29	57	15
<i>By Member State</i>									
België/Belgique	19	76	5	34	61	5	36	60	4
Danmark	28	49	23	28	49	23	29	50	21
BR Deutschland	19	74	6	23	70	8	23	69	8
Elláda	29	66	4	31	60	9	29	61	11
España	23	61	16	28	51	21	29	49	22
France	27	62	11	33	52	16	34	50	16
Italia	41	28	31	42	26	31	43	25	32
Luxembourg	21	53	25	44	39	17	46	34	20
Nederland	17	74	9	20	65	15	20	64	16
Portugal	18	72	10	19	66	15	24	60	16
United Kingdom	11	82	7	21	70	9	23	68	9
<i>By Manufacturing Sector</i>									
Food, beverages and tobacco	31	61	9	31	56	13	31	56	13
Textiles, leather and furniture	27	56	17	26	58	15	27	59	14
Wood, paper and printing/publishing	16	71	13	15	69	16	16	67	18
Chemicals, rubber and plastics	22	64	15	30	55	15	32	53	15
Non-metallic mineral products	25	66	9	20	64	16	20	64	17
Metals and metal products	22	65	13	23	63	14	24	60	16
Machinery and equipment NEC	24	55	21	26	59	16	26	59	16
Electrical and optical machinery	23	63	14	27	61	11	28	60	11
Transport equipment	44	50	6	41	45	14	42	44	14
<i>By Employment Size Class</i>									
20-49	24	61	14	24	62	14	24	63	12
50-199	24	63	14	24	63	14	25	61	14
200-499	28	59	14	28	59	14	30	57	13
500-999	28	57	15	27	58	15	26	59	15
≥ 1,000	30	55	16	32	53	15	33	51	16

¹ EUR-11 = EUR-12 excluding Ireland.

Source: Eurostat.

4.2. Distributive trade sectors

Due to the absence of reliable statistics on the employment of enterprises by sector, size class and country in the services sectors, the results of the survey for these sectors are given only expressed in percentage of enterprises.

Tables D.3. & D.4. Single market's impact on your firm

Classification	D.3. Measures to facilitate cross-border operations into other EU states				D.4. Measures to facilitate physical establishment in other EU states			
	Percentage of enterprises expressing opinion				Percentage of enterprises expressing opinion			
	Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know
EUR-12	25	56	5	14	8	71	2	20
By Member State								
België/Belgique	32	44	5	18	9	68	1	22
Danmark	11	42	2	44	28	23	6	43
BR Deutschland	23	53	2	22	4	63	0	33
Elláda	64	21	3	12	30	41	3	26
España	52	38	2	9	17	67	2	15
France	27	42	16	16	3	70	4	23
Ireland	43	36	4	17	10	69	2	20
Italia	22	72	2	4	9	85	0	6
Luxembourg	51	24	20	6	12	47	4	37
Nederland	26	48	13	13	5	69	6	21
Portugal	36	25	5	34	18	34	6	42
United Kingdom	10	80	2	8	4	85	1	9
By Services Sector								
Wholesaling and motor vehicles	32	52	6	11	9	71	2	19
Retail trade	20	59	5	16	7	71	2	20
By Employment Size Class								
5-49	25	56	5	14	7	71	2	20
50-199	32	51	8	9	10	73	2	15
200-499	38	50	6	6	15	68	4	14
500-999	42	47	9	2	15	72	3	10
≥ 1,000	40	48	4	7	19	68	2	11

Source: Eurostat.

Tables D.5. & D.6. Single market's impact on your firm

Classification	D.5. The opening-up of public procurement				D.6. The liberalization of capital movements			
	Percentage of enterprises expressing opinion				Percentage of enterprises expressing opinion			
	Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know
EUR-12	7	73	2	18	13	71	1	15
By Member State								
België/Belgique	4	72	3	21	12	64	1	24
Danmark	5	48	1	46	1	49	3	47
BR Deutschland	5	61	2	31	13	59	1	28
Elláda	24	48	4	24	55	32	3	10
España	21	59	2	17	35	55	1	9
France	2	83	1	14	9	75	2	14
Ireland	14	64	6	16	19	60	2	18
Italia	13	87	0	0	7	91	0	2
Luxembourg	19	51	16	14	25	53	6	16
Nederland	2	68	2	28	12	67	3	18
Portugal	3	42	5	50	20	38	0	41
United Kingdom	2	86	2	10	6	86	1	8
By Services Sector								
Wholesaling and motor vehicles	9	73	2	16	16	68	1	15
Retail trade	6	73	2	20	11	73	1	16
By Employment Size Class								
5-49	7	73	2	18	13	71	1	16
50-199	6	75	5	14	20	67	1	12
200-499	11	71	5	13	18	70	2	10
500-999	5	78	5	13	22	64	4	10
≥ 1,000	10	75	3	13	25	63	1	11

Source: Eurostat.

Table D.7. Single market's impact on your firm

Classification	D.7. Double-taxation agreements			
	Percentage of enterprises expressing opinion			
	Positive impact	No impact	Negative impact	Don't know
EUR-12	9	67	2	23
By Member State				
België/Belgique	5	62	1	32
Danmark	15	42	0	43
BR Deutschland	7	64	1	28
Elláda	19	37	12	31
España	34	50	0	16
France	1	61	1	37
Ireland	17	56	1	26
Italia	6	81	4	9
Luxembourg	18	49	12	22
Nederland	5	69	1	25
Portugal	16	33	2	48
United Kingdom	3	84	1	12
By Services Sector				
Wholesaling and motor vehicles	12	65	2	20
Retail trade	7	68	1	25
By Employment Size Class				
5-49	9	67	1	23
50-199	12	68	3	18
200-499	14	67	3	16
500-999	21	58	0	20
≥ 1,000	22	62	1	16

Source: Eurostat.

Tables D.8. & D.9. Single market's impact on your company's operations

Classification	D.8. Sales to the domestic market				D.9. Sales to other EU countries			
	Percentage of enterprises expressing opinion				Percentage of enterprises expressing opinion			
	Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know
EUR-12	9	70	10	10	11	73	2	14
By Member State								
België/Belgique	9	60	15	17	14	61	2	23
Danmark	2	51	1	46	10	45	3	41
BR Deutschland	5	73	5	17	4	66	2	28
Elláda	25	49	22	4	18	58	1	23
España	21	58	19	2	19	75	0	6
France	7	64	11	18	4	73	1	23
Ireland	14	57	17	12	12	73	3	13
Italia	12	79	8	2	22	76	2	0
Luxembourg	8	41	49	2	20	39	14	28
Nederland	7	74	14	5	16	71	2	11
Portugal	15	55	19	11	10	59	8	23
United Kingdom	6	81	8	5	9	86	2	4
By Services Sector								
Wholesaling and motor vehicles	13	67	13	7	19	69	2	9
Retail trade	7	73	8	12	5	77	1	17
By Employment Size Class								
5-49	9	70	10	10	11	73	2	14
50-199	8	72	14	6	15	71	2	11
200-499	8	78	12	2	14	76	2	8
500-999	12	64	10	14	11	76	3	10
≥ 1,000	11	78	8	3	13	77	3	8

Source: Eurostat.

Tables D.12. & D.13. Single market's impact on your company's operations

Classification	D.12. Profitability				D.13. Employment			
	Percentage of enterprises expressing opinion				Percentage of enterprises expressing opinion			
	Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know
EUR-12	8	71	9	12	5	77	8	9
By Member State								
België/Belgique	8	52	20	19	5	65	11	19
Danmark	4	53	1	41	12	40	5	43
BR Deutschland	4	70	6	20	1	76	4	19
Elláda	21	45	26	8	18	42	32	8
España	18	62	14	6	8	69	15	8
France	5	60	17	19	0	79	11	9
Ireland	5	70	13	12	4	69	19	8
Italia	15	85	0	0	14	85	0	0
Luxembourg	6	50	32	12	10	53	30	8
Nederland	8	67	11	15	3	74	11	12
Portugal	13	59	11	17	6	63	15	16
United Kingdom	5	83	7	5	4	88	6	2
By Services Sector								
Wholesaling and motor vehicles	15	69	8	8	8	78	7	7
Retail trade	3	72	10	14	3	77	8	12
By Employment Size Class								
5-49	8	71	9	12	5	78	8	10
50-199	10	72	12	7	8	75	10	7
200-499	9	75	11	5	5	81	10	5
500-999	17	61	13	9	7	75	9	8
≥ 1,000	12	75	10	4	10	82	7	2

Source: Eurostat.

Tables D.14. & D.15. Single market's importance to the development of strategy

Classification	D.14. More standardized products/services				D.15. More specialized products/services			
	Percentage of enterprises expressing opinion				Percentage of enterprises expressing opinion			
	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know
EUR-12	4	15	44	38	6	13	44	37
By Member State								
België/Belgique	5	33	22	40	4	34	20	42
Danmark	10	48	1	41	6	19	30	45
BR Deutschland	1	10	67	21	2	12	67	18
Elláda	28	25	20	27	32	29	16	22
España	4	23	30	43	11	34	16	39
France	1	8	35	56	3	7	33	57
Ireland	10	25	32	32	9	12	50	29
Italia	3	18	65	14	14	6	66	14
Luxembourg	12	14	45	30	16	14	39	32
Nederland	4	14	27	56	9	7	28	56
Portugal	10	19	22	48	13	21	24	41
United Kingdom	4	10	42	45	3	6	43	48
By Services Sector								
Wholesaling and motor vehicles	5	18	44	34	7	15	45	33
Retail trade	3	12	45	41	6	11	43	40
By Employment Size Class								
5-49	3	15	44	38	7	13	43	38
50-199	7	15	49	29	6	14	52	28
200-499	5	22	52	21	4	21	52	23
500-999	5	21	46	28	3	9	60	28
≥ 1,000	6	14	56	24	3	10	61	26

Source: Eurostat.

Tables D.18. & D.19. Single market's importance to the development of strategy

Classification	D.18. Efficiency in the provision of products/services				D.19 Increase in cross-border provision of services to other EU states			
	Percentage of enterprises expressing opinion				Percentage of enterprises expressing opinion			
	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know
EUR-12	7	12	44	37	3	8	43	46
By Member State								
België/Belgique	8	40	15	37	7	32	17	44
Danmark	2	13	38	46	8	16	32	44
BR Deutschland	1	11	68	19	1	4	66	30
Elláda	38	25	19	19	23	17	22	38
España	15	23	25	38	5	5	17	72
France	2	5	32	61	1	7	25	67
Ireland	16	27	37	21	13	6	37	44
Italia	12	10	66	12	2	14	68	16
Luxembourg	12	20	35	34	8	23	27	42
Nederland	10	15	24	52	8	12	27	53
Portugal	11	18	31	41	2	15	30	52
United Kingdom	5	7	41	47	4	5	43	48
By Services Sector								
Wholesaling and motor vehicles	9	17	44	30	6	11	45	38
Retail trade	6	8	44	42	2	6	41	51
By Employment Size Class								
5-49	7	12	44	37	3	8	42	46
50-199	7	15	49	28	6	12	47	35
200-499	10	19	52	19	4	13	53	30
500-999	5	21	52	22	3	10	48	38
≥ 1,000	10	14	53	24	6	15	45	33

Source: Eurostat.

Tables D.20. & D.21. Single market's importance to the development of strategy

Classification	D.20. Establishment of operations in other EU states				D.21. Distribution networks in other EU states			
	Percentage of enterprises expressing opinion				Percentage of enterprises expressing opinion			
	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know
EUR-12	3	5	45	47	3	6	44	47
By Member State								
België/Belgique	2	30	17	50	4	27	16	53
Danmark	5	16	33	46	2	8	41	50
BR Deutschland	0	2	65	33	0	2	64	33
Elláda	16	10	27	47	16	11	25	48
España	7	7	19	68	7	4	15	74
France	1	3	27	69	4	7	30	59
Ireland	3	8	37	52	1	11	35	53
Italia	7	2	79	12	0	9	79	12
Luxembourg	2	8	37	53	6	14	31	49
Nederland	3	9	29	59	3	9	30	58
Portugal	4	8	36	52	2	8	32	58
United Kingdom	3	4	43	51	3	4	41	51
By Services Sector								
Wholesaling and motor vehicles	4	7	49	41	3	7	49	41
Retail trade	3	4	42	52	2	6	41	51
By Employment Size Class								
5-49	3	5	45	48	3	6	44	47
50-199	5	7	51	37	6	7	49	38
200-499	4	10	51	35	4	14	52	30
500-999	3	9	49	39	5	11	45	39
≥ 1,000	5	13	46	36	6	5	54	35

Source: Eurostat.

Tables D.22. & D.23. Single market's importance to the development of strategy

Classification	D.22. Advertising in other EU states				D.23. Purchase of business services from other EU states			
	Percentage of enterprises expressing opinion				Percentage of enterprises expressing opinion			
	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know
EUR-12	3	5	43	49	3	7	44	46
By Member State								
België/Belgique	2	28	15	55	6	35	19	40
Danmark	3	14	36	47	3	7	42	48
BR Deutschland	0	2	64	33	0	1	64	34
Elláda	15	9	27	49	19	20	23	38
España	2	6	13	79	4	10	16	70
France	1	7	20	72	4	6	24	65
Ireland	0	4	39	56	7	22	31	40
Italia	6	2	79	12	7	8	74	12
Luxembourg	6	8	35	51	12	14	33	41
Nederland	3	7	30	59	3	11	33	53
Portugal	4	11	27	58	2	8	33	56
United Kingdom	3	2	43	52	2	4	45	49
By Services Sector								
Wholesaling and motor vehicles	3	6	49	42	4	10	47	38
Retail trade	2	5	38	55	3	4	41	51
By Employment Size Class								
5-49	3	5	42	50	3	7	43	46
50-199	5	5	51	39	4	9	54	33
200-499	6	7	55	32	7	14	53	26
500-999	0	5	53	41	4	5	55	36
≥ 1,000	3	4	55	38	5	11	52	31

Source: Eurostat.

Tables D.24. & D.25. Single market's importance to the development of strategy

Classification	D.24. Purchase of financial services from other EU countries				D.25. Direct investment in other companies			
	Percentage of enterprises expressing opinion				Percentage of enterprises expressing opinion			
	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know
EUR-12	1	6	44	49	1	5	40	54
By Member State								
België/Belgique	3	27	18	52	1	27	12	61
Danmark	3	14	35	47	0	9	40	51
BR Deutschland	0	1	65	33	0	2	64	33
Elláda	21	18	23	39	14	5	29	51
España	1	8	11	80	0	4	8	87
France	1	3	26	70	1	1	13	86
Ireland	1	7	42	51	2	3	37	58
Italia	0	15	73	12	0	15	73	12
Luxembourg	2	6	33	59	2	4	23	71
Nederland	2	3	32	63	0	8	19	74
Portugal	6	5	31	58	2	4	27	67
United Kingdom	0	2	47	51	1	2	45	52
By Services Sector								
Wholesaling and motor vehicles	2	6	49	43	1	5	46	47
Retail trade	1	6	40	53	0	5	36	59
By Employment Size Class								
5-49	1	6	43	50	1	5	40	55
50-199	2	6	56	36	2	5	49	44
200-499	6	10	53	31	4	8	52	37
500-999	0	3	61	35	3	7	50	39
≥ 1,000	3	12	52	33	4	11	44	41

Source: Eurostat.

Tables D.26. & D.27. Single market's importance to the development of strategy

Classification	D.26. Investment from other companies				D.27. Co-operation agreements with other companies			
	Percentage of enterprises expressing opinion				Percentage of enterprises expressing opinion			
	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know
EUR-12	1	4	41	55	2	6	35	57
By Member State								
België/Belgique	1	27	11	62	2	29	11	59
Danmark	3	5	39	53	3	6	42	49
BR Deutschland	0	2	64	34	0	3	64	34
Elláda	13	11	28	47	23	11	25	40
España	0	2	8	90	3	7	6	84
France	1	0	12	87	1	4	10	85
Ireland	1	3	35	60	3	7	36	54
Italia	0	9	79	12	4	16	68	12
Luxembourg	4	2	21	73	8	6	19	67
Nederland	0	7	19	74	4	6	17	74
Portugal	2	5	29	65	6	8	24	62
United Kingdom	0	2	45	53	1	2	29	68
By Services Sector								
Wholesaling and motor vehicles	1	5	46	49	3	8	37	52
Retail trade	0	4	37	59	2	5	33	60
By Employment Size Class								
5-49	0	4	40	55	2	7	34	57
50-199	3	4	48	45	4	5	42	49
200-499	4	6	52	38	4	9	46	42
500-999	1	3	53	43	2	5	43	50
≥ 1,000	3	3	51	43	4	7	46	43

Source: Eurostat.

Tables D.30. & D.31. Any change in competition levels in the domestic market

Classification	D.30. Competitors: non-EU-owned enterprises			D.31. Price competition: domestically owned enterprises		
	Percentage of enterprises expressing opinion			Percentage of enterprises expressing opinion		
	Increase	No change	Decrease	Increase	No change	Decrease
EUR-12	9	90	1	38	60	2
<i>By Member State</i>						
België/Belgique	8	90	2	30	67	2
Danmark	10	90	0	47	52	1
BR Deutschland	5	94	1	29	69	2
Elláda	15	76	10	48	39	13
España	18	80	2	54	43	3
France	10	86	3	56	40	4
Ireland	4	92	4	56	40	4
Italia	4	96	0	27	71	2
Luxembourg	16	84	0	47	35	17
Nederland	12	88	0	50	50	0
Portugal	7	87	5	51	46	2
United Kingdom	9	91	0	26	73	0
<i>By Services Sector</i>						
Wholesaling and motor vehicles	14	85	1	37	61	2
Retail trade	5	93	2	39	59	2
<i>By Employment Size Class</i>						
5-49	8	90	1	37	60	2
50-199	15	84	1	46	51	2
200-499	17	81	2	44	54	2
500-999	7	93	0	40	59	1
≥ 1,000	13	87	1	47	51	2

Source: Eurostat.

Tables D.32. & D.33. Any change in competition levels in the domestic market

Classification	D.32. Price competition: other EU-owned enterprises			D.33. Price competition: non-EU-owned enterprises		
	Percentage of enterprises expressing opinion			Percentage of enterprises expressing opinion		
	Increase	No change	Decrease	Increase	No change	Decrease
EUR-12	29	68	3	11	85	4
<i>By Member State</i>						
België/Belgique	35	62	2	9	88	2
Danmark	33	66	1	16	83	1
BR Deutschland	19	80	1	7	90	3
Elláda	35	46	19	15	72	13
España	53	45	2	18	79	3
France	52	45	3	19	72	9
Ireland	40	56	4	3	91	5
Italia	7	86	7	7	86	7
Luxembourg	44	28	29	20	78	2
Nederland	41	59	0	15	85	0
Portugal	43	51	5	15	81	4
United Kingdom	16	84	0	7	93	0
<i>By Services Sector</i>						
Wholesaling and motor vehicles	30	67	4	13	83	4
Retail trade	28	70	2	9	87	4
<i>By Employment Size Class</i>						
5-49	28	69	3	10	86	4
50-199	40	58	2	20	78	2
200-499	43	55	2	21	77	2
500-999	34	65	1	11	89	1
≥ 1,000	38	60	2	13	85	2

Source: Eurostat.

Tables D.34 & D.35. Any change in competition levels in the domestic market

Classification	D.34. Quality competition: domestically owned enterprises			D.35. Quality competition: other EU-owned enterprises		
	Percentage of enterprises expressing opinion			Percentage of enterprises expressing opinion		
	Increase	No change	Decrease	Increase	No change	Decrease
EUR-12	28	69	3	19	79	2
<i>By Member State</i>						
België/Belgique	22	77	1	22	76	2
Danmark	33	66	1	23	76	1
BR Deutschland	22	76	2	18	81	1
Elláda	42	52	5	35	55	10
España	42	53	5	35	61	4
France	36	61	4	26	71	3
Ireland	46	50	5	33	63	4
Italia	33	67	0	7	93	0
Luxembourg	36	60	4	37	49	14
Nederland	23	76	2	20	80	0
Portugal	37	58	5	36	61	4
United Kingdom	17	80	3	11	88	1
<i>By Services Sector</i>						
Wholesaling and motor vehicles	25	72	2	19	80	1
Retail trade	30	67	3	19	78	2
<i>By Employment Size Class</i>						
5-49	28	69	3	19	79	2
50-199	31	67	2	28	71	2
200-499	31	65	4	25	72	3
500-999	28	70	1	25	73	2
≥ 1,000	34	65	1	28	71	1

Source: Eurostat.

Table D.36. Any change in competition levels in the domestic market

Classification	D.36. Quality competition: non-EU-owned enterprises		
	Percentage of enterprises expressing opinion		
	Increase	No change	Decrease
EUR-12	8	90	2
<i>By Member State</i>			
België/Belgique	5	94	1
Danmark	11	87	2
BR Deutschland	7	90	4
Elláda	13	80	7
España	14	84	2
France	10	84	6
Ireland	4	90	6
Italia	6	94	0
Luxembourg	22	74	4
Nederland	8	92	0
Portugal	11	85	4
United Kingdom	4	95	0
<i>By Services Sector</i>			
Wholesaling and motor vehicles	8	91	1
Retail trade	8	89	3
<i>By Employment Size Class</i>			
5-49	8	90	2
50-199	11	87	2
200-499	10	87	3
500-999	13	87	0
≥ 1,000	14	86	0
Source: Eurostat.			

Tables D.37. & D.38. Single market legislation as it affects your own firm or sector

Classification	D.37. The single market programme has been a success for your firm			D.38. The single market programme has been a success for your sector in your country		
	Percentage of enterprises expressing opinion			Percentage of enterprises expressing opinion		
	Agree	No opinion	Disagree	Agree	No opinion	Disagree
EUR-12	18	58	23	19	59	23
By Member State						
België/Belgique	17	69	15	12	73	15
Danmark	19	59	22	18	57	24
BR Deutschland	23	62	15	26	55	19
Elláda	42	34	24	45	28	26
España	29	25	45	27	35	37
France	13	49	38	5	61	34
Ireland	24	59	16	28	55	17
Italia	35	54	11	45	42	13
Luxembourg	21	26	53	15	36	49
Nederland	6	70	24	2	73	25
Portugal	7	50	43	11	47	42
United Kingdom	7	78	16	6	80	14
By Services Sector						
Wholesaling and motor vehicles	24	53	24	20	54	26
Retail trade	14	63	23	18	62	20
By Employment Size Class						
5-49	18	59	23	19	59	22
50-199	26	49	25	23	46	31
200-499	26	51	24	23	49	28
500-999	20	50	30	17	51	32
≥ 1,000	26	60	14	21	62	17

Source: Eurostat.

Tables D.39. & D.40. Single market legislation as it affects your own firm or sector

Classification	D.39. The single market programme has been a success for your sector in the EU			D.40. The single market programme has been successful in eliminating obstacles to EU trade in your sector		
	Percentage of enterprises expressing opinion			Percentage of enterprises expressing opinion		
	Agree	No opinion	Disagree	Agree	No opinion	Disagree
EUR-12	16	68	15	27	59	14
By Member State						
België/Belgique	14	79	8	18	74	7
Danmark	17	61	21	26	48	26
BR Deutschland	21	67	12	28	62	10
Elláda	27	55	18	51	34	15
España	25	65	10	57	34	9
France	10	64	26	25	65	11
Ireland	15	69	17	39	50	11
Italia	34	54	12	27	42	30
Luxembourg	21	42	37	33	36	31
Nederland	8	74	17	19	66	15
Portugal	5	64	31	33	46	21
United Kingdom	5	83	12	14	77	9
By Services Sector						
Wholesaling and motor vehicles	18	67	15	29	54	17
Retail trade	15	69	16	25	63	11
By Employment Size Class						
5-49	16	69	15	27	60	13
50-199	24	56	20	31	47	22
200-499	25	57	18	35	51	13
500-999	18	57	24	30	37	33
≥ 1,000	22	66	12	33	54	13

Source: Eurostat.

Tables D.41. & D.42. Single market legislation as it affects your own firm or sector

Classification	D.41. The single market programme has been successful in creating a genuine single market in your sector¹			D.42. Additional measures are needed to eliminate obstacles to EU trade²		
	Percentage of enterprises expressing opinion			Percentage of enterprises expressing opinion		
	Agree	No opinion	Disagree	Agree	No opinion	Disagree
EUR-12 (see notes)	13	65	22	20	72	8
By Member State						
België/Belgique	11	76	13	16	78	6
Danmark	11	52	37	31	58	12
BR Deutschland	23	66	10	10	82	8
Elláda	29	35	36	32	57	12
España	22	46	32	24	59	17
France	6	68	27	23	70	6
Ireland	-	-	-	23	67	10
Italia	12	52	36	47	45	8
Luxembourg	20	38	43	33	52	16
Nederland	9	67	24	10	79	11
Portugal	14	53	34	13	76	11
United Kingdom	6	80	14	9	86	5
By Services Sector						
Wholesaling and motor vehicles	15	58	27	21	68	10
Retail trade	11	70	19	18	75	7
By Employment Size Class						
5-49	13	65	22	19	72	8
50-199	19	53	29	22	66	11
200-499	16	54	30	21	70	8
500-999	19	49	32	23	62	15
≥ 1,000	23	56	22	24	68	8

¹ EUR-11 = EUR-12 excluding Ireland.² EUR-12.

Source: Eurostat.

Table D.43. Single market legislation as it affects your own firm or sector

Classification	D.43. Additional measures are needed in this sector to create a genuine single market ¹		
	Percentage of enterprises expressing opinion		
	Agree	No opinion	Disagree
EUR-11	16	75	10
By Member State			
België/Belgique	13	83	4
Danmark	27	57	16
BR Deutschland	9	82	9
Elláda	45	45	10
España	33	52	15
France	15	76	9
Italia	29	51	20
Luxembourg	33	55	12
Nederland	8	81	11
Portugal	8	84	9
United Kingdom	6	91	3
By Services Sector			
Wholesaling and motor vehicles	19	69	11
Retail trade	12	79	9
By Employment Size Class			
5-49	15	75	10
50-199	18	71	11
200-499	14	76	10
500-999	21	65	14
≥ 1,000	21	70	9

¹ EUR-11 = EUR-12 excluding Ireland.

Source: Eurostat.

4.3. Other services sectors

Due to the absence of reliable statistics on the employment of enterprises by sector, size class and country in the services sectors, the results of the survey for these sectors are given only expressed in percentage of enterprises.

Tables S.1. & S.2. Single market's impact on your firm¹

Classification	S.1. Harmonization of licensing/authorization requirements in EU				S.2. Recognition of licences/authorizations in other EU states			
	Percentage of enterprises expressing opinion				Percentage of enterprises expressing opinion			
	Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know
EUR-11	11	70	7	12	12	72	4	13
By Member State								
België/Belgique	11	67	3	19	14	63	2	22
Danmark	8	9	0	83	8	53	4	34
Elláda	32	38	0	30	25	42	2	31
España	24	54	5	17	26	52	5	17
France	12	64	8	16	11	65	9	15
Ireland	24	57	4	15	21	65	1	12
Italia	8	68	22	2	18	68	2	11
Luxembourg	16	68	8	8	9	77	6	8
Nederland	6	74	5	15	6	82	2	10
Portugal	8	38	6	48	10	38	0	51
United Kingdom	7	84	5	4	6	86	3	5
By Services Sector								
Hotels and restaurants	3	71	11	14	6	71	5	18
Transport, storage and communication	25	56	8	11	24	62	5	9
Financial intermediation	16	71	3	10	18	73	1	9
Property and business activities	9	75	4	12	9	77	3	10
By Employment Size Class								
5-49	10	70	7	13	12	72	4	13
50-199	17	71	5	8	14	75	3	8
200-499	17	76	2	5	10	80	2	7
500-999	22	67	4	7	19	73	2	7
≥ 1,000	25	62	4	8	22	67	3	8

¹ EUR-11 = EUR-12 excluding BR Deutschland.

Source: Eurostat.

Tables S.3. & S.4. Single market's impact on your firm¹

Classification	S.3. Measures to facilitate cross-border operations into other EU states				S.4. Measures to facilitate physical establishment in other EU states			
	Percentage of enterprises expressing opinion				Percentage of enterprises expressing opinion			
	Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know
EUR-11	22	65	3	10	9	77	1	13
By Member State								
België/Belgique	24	57	3	15	14	67	0	19
Danmark	9	55	3	33	30	34	2	34
Elláda	56	26	2	16	34	37	5	25
España	47	41	4	8	18	67	0	15
France	28	58	3	11	9	83	0	8
Ireland	31	56	1	12	13	66	1	19
Italia	23	52	2	23	11	63	0	26
Luxembourg	29	59	8	4	11	77	6	7
Nederland	22	67	2	9	5	84	1	10
Portugal	21	28	6	45	4	42	3	51
United Kingdom	10	83	3	3	4	89	1	5
By Services Sector								
Hotels and restaurants	13	66	4	17	7	76	1	15
Transport, storage and communication	43	44	6	7	12	70	2	16
Financial intermediation	25	66	1	8	8	77	1	14
Property and business activities	19	72	2	7	8	82	1	9
By Employment Size Class								
5-49	22	64	3	11	8	78	1	13
50-199	24	67	3	7	13	76	2	9
200-499	27	67	3	4	14	77	2	7
500-999	29	61	3	7	17	73	2	8
≥ 1,000	36	57	3	4	25	66	2	7

¹ EUR-11 = EUR-12 excluding BR Deutschland.

Source: Eurostat.

Tables S.5. & S.6. Single market's impact on your firm¹

Classification	S.5. The opening-up of public procurement				S.6. The liberalization of capital movements			
	Percentage of enterprises expressing opinion				Percentage of enterprises expressing opinion			
	Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know
EUR-11	9	72	4	15	16	72	1	10
By Member State								
België/Belgique	5	73	1	21	21	58	2	19
Danmark	7	59	0	34	7	56	4	33
Elláda	22	51	6	21	67	20	0	13
España	26	56	4	14	37	56	0	7
France	4	72	5	19	14	72	2	12
Ireland	11	69	3	17	18	62	3	17
Italia	26	52	1	22	41	48	1	10
Luxembourg	16	68	10	6	24	59	6	11
Nederland	7	75	5	14	11	76	2	12
Portugal	3	45	7	45	16	37	0	46
United Kingdom	2	87	4	8	3	90	2	5
By Services Sector								
Hotels and restaurants	11	69	1	19	17	69	1	13
Transport, storage and communication	10	67	8	15	20	69	3	9
Financial intermediation	6	74	2	17	25	60	1	14
Property and business activities	8	77	4	11	13	78	1	8
By Employment Size Class								
5-49	9	72	4	15	16	72	1	11
50-199	11	75	5	10	17	73	1	9
200-499	18	72	5	5	19	73	1	7
500-999	19	65	11	5	27	64	1	8
≥ 1,000	23	60	8	9	34	57	2	7

¹ EUR-11 = EUR-12 excluding BR Deutschland.

Source: Eurostat.

Table S.7. Single market's impact on your firm¹

Classification	S.7. Double-taxation agreements			
	Percentage of enterprises expressing opinion			
	Positive impact	No impact	Negative impact	Don't know
EUR-11	11	69	2	18
<i>By Member State</i>				
België/Belgique	13	61	2	24
Danmark	10	54	0	36
Elláda	29	35	7	30
España	28	50	0	22
France	8	60	3	29
Ireland	22	54	6	18
Italia	27	51	0	22
Luxembourg	21	58	6	16
Nederland	2	80	0	19
Portugal	10	35	2	54
United Kingdom	3	87	3	7
<i>By Services Sector</i>				
Hotels and restaurants	11	64	1	25
Transport, storage and communication	12	65	4	19
Financial intermediation	11	67	0	22
Property and business activities	11	76	2	11
<i>By Employment Size Class</i>				
5-49	11	69	2	19
50-199	14	73	2	11
200-499	16	74	1	9
500-999	19	61	2	18
≥ 1,000	27	58	1	13

¹ EUR-11 = EUR-12 excluding BR Deutschland.

Source: Eurostat.

Tables S.8. & S.9. Single market's impact on your company's operations¹

Classification	S.8. Sales to the domestic market				S.9. Sales to other EU countries			
	Percentage of enterprises expressing opinion				Percentage of enterprises expressing opinion			
	Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know
EUR-11	13	74	5	8	12	76	2	10
<i>By Member State</i>								
België/Belgique	12	71	2	15	12	70	2	15
Danmark	2	60	1	37	8	52	6	34
Elláda	30	53	6	12	41	44	1	13
España	17	66	13	4	18	62	8	12
France	16	74	5	5	16	79	1	5
Ireland	19	68	6	8	18	72	3	6
Italia	32	51	4	13	16	67	0	17
Luxembourg	12	71	15	2	13	81	4	2
Nederland	9	75	1	15	6	76	0	18
Portugal	9	48	23	20	12	52	12	24
United Kingdom	5	88	3	4	9	86	1	4
<i>By Services Sector</i>								
Hotels and restaurants	13	74	4	9	10	76	2	11
Transport, storage and communication	18	65	8	9	18	65	5	12
Financial intermediation	13	72	7	8	7	81	1	11
Property and business activities	9	79	5	7	13	79	1	7
<i>By Employment Size Class</i>								
5-49	13	74	5	8	12	76	2	10
50-199	10	77	7	6	16	76	1	7
200-499	16	73	8	3	16	78	0	6
500-999	10	71	14	5	19	72	1	8
≥ 1,000	18	69	10	3	25	69	1	4

¹ EUR-11 = EUR-12 excluding BR Deutschland.

Source: Eurostat.

Tables S.10. & S.11. Single market's impact on your company's operations¹

Classification	S.10. Sales to non-EU countries				S.11. Productivity			
	Percentage of enterprises expressing opinion				Percentage of enterprises expressing opinion			
	Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know
EUR-11	5	83	2	10	10	78	4	8
By Member State								
België/Belgique	3	79	0	18	9	73	4	14
Danmark	16	49	1	34	6	61	0	34
Elláda	16	65	0	19	27	54	3	16
España	7	75	4	14	21	66	9	4
France	9	85	0	5	13	80	4	4
Ireland	4	87	1	8	13	77	3	6
Italia	11	71	2	16	30	54	3	12
Luxembourg	8	88	0	4	12	78	4	6
Nederland	2	80	0	18	4	77	2	16
Portugal	3	61	10	26	7	65	3	25
United Kingdom	1	94	1	3	1	91	4	4
By Services Sector								
Hotels and restaurants	7	79	2	12	12	74	4	10
Transport, storage and communication	6	79	5	11	16	69	6	9
Financial intermediation	1	85	0	13	8	83	3	7
Property and business activities	3	89	1	7	6	85	4	5
By Employment Size Class								
5-49	5	83	2	10	10	78	4	8
50-199	4	87	1	8	11	81	2	6
200-499	4	90	0	5	14	78	4	4
500-999	10	82	1	8	11	82	2	5
≥ 1,000	8	86	1	5	21	72	2	4

¹ EUR-11 = EUR-12 excluding BR Deutschland.

Source: Eurostat.

Tables S.12. & S.13. Single market's impact on your company's operations¹

Classification	S.12. Profitability				S.13. Employment			
	Percentage of enterprises expressing opinion				Percentage of enterprises expressing opinion			
	Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know
EUR-11	12	75	7	7	9	78	7	7
By Member State								
België/Belgique	5	72	10	13	6	74	7	13
Danmark	8	58	0	34	8	54	4	34
Elláda	31	52	3	15	14	57	18	10
España	17	63	13	7	10	69	15	6
France	10	80	7	3	2	83	6	8
Ireland	18	70	5	7	16	72	8	3
Italia	40	54	4	2	27	67	4	2
Luxembourg	16	70	8	6	24	66	8	2
Nederland	4	79	2	16	6	79	1	15
Portugal	9	60	7	24	3	60	8	29
United Kingdom	5	85	7	4	6	85	5	4
By Services Sector								
Hotels and restaurants	16	74	4	7	10	75	6	9
Transport, storage and communication	15	65	11	9	11	70	10	9
Financial intermediation	9	79	6	6	4	86	3	7
Property and business activities	7	80	7	6	7	82	6	5
By Employment Size Class								
5-49	12	75	7	7	8	78	7	8
50-199	11	75	9	6	10	76	7	6
200-499	11	77	9	4	10	81	5	4
500-999	11	73	11	5	11	79	6	4
≥ 1,000	20	64	11	5	11	74	11	4

¹ EUR-11 = EUR-12 excluding BR Deutschland.

Source: Eurostat.

Tables S.14. & S.15. Single market's importance to the development of strategy¹

Classification	S.14. More standardized products/services				S.15. More specialized products/services			
	Percentage of enterprises expressing opinion				Percentage of enterprises expressing opinion			
	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know
EUR-11	7	15	33	45	8	15	34	44
<i>By Member State</i>								
België/Belgique	6	36	22	36	7	38	21	35
Danmark	12	49	4	35	4	15	37	44
Elláda	17	28	20	34	34	24	15	27
España	5	16	19	60	13	20	11	56
France	9	11	33	47	8	14	33	46
Ireland	14	22	43	21	14	21	45	19
Italia	20	30	34	16	22	28	38	13
Luxembourg	4	23	25	49	8	24	18	50
Nederland	4	7	31	58	8	14	28	49
Portugal	9	12	41	37	5	9	48	38
United Kingdom	3	9	40	48	2	7	42	49
<i>By Services Sector</i>								
Hotels and restaurants	7	14	26	53	8	14	25	52
Transport, storage and communication	10	13	31	46	12	13	32	44
Financial intermediation	9	11	50	30	7	16	52	26
Property and business activities	5	16	38	41	5	15	40	39
<i>By Employment Size Class</i>								
5-49	7	14	33	45	8	14	34	44
50-199	4	17	34	45	6	17	33	44
200-499	5	19	43	33	8	20	40	32
500-999	6	17	47	29	9	18	42	31
≥ 1,000	9	23	42	27	12	24	39	25

¹ EUR-11 = EUR-12 excluding BR Deutschland.

Source: Eurostat.

Tables S.16. & S.17. Single market's importance to the development of strategy¹

Classification	S.16. Pricing				S.17. Development of new products/services			
	Percentage of enterprises expressing opinion				Percentage of enterprises expressing opinion			
	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know
EUR-11	8	13	38	42	8	15	35	42
By Member State								
België/Belgique	10	43	15	33	5	46	16	34
Danmark	2	25	31	43	3	18	34	45
Elláda	12	13	30	45	35	28	15	22
España	12	19	24	44	10	24	18	48
France	3	13	41	44	9	15	30	45
Ireland	9	30	44	17	17	28	38	17
Italia	28	14	47	10	22	22	45	11
Luxembourg	10	8	28	54	4	26	17	53
Nederland	4	15	32	49	8	12	28	52
Portugal	3	16	51	30	2	10	46	42
United Kingdom	3	5	41	51	4	8	41	47
By Services Sector								
Hotels and restaurants	8	9	32	51	7	13	27	53
Transport, storage and communication	16	16	30	38	13	14	33	40
Financial intermediation	7	13	54	25	7	20	50	23
Property and business activities	4	13	44	39	7	17	40	36
By Employment Size Class								
5-49	8	12	38	43	8	15	34	42
50-199	7	17	37	39	7	17	36	40
200-499	8	19	44	30	6	24	40	30
500-999	7	25	40	27	11	18	44	26
≥ 1,000	15	21	40	25	13	26	40	22

¹ EUR-11 = EUR-12 excluding BR Deutschland.

Source: Eurostat.

Tables S.18. & S.19. Single market's importance to the development of strategy¹

Classification	S.18. Efficiency in the provision of products/services				S.19. Increase in cross-border provision of services to other EU states			
	Percentage of enterprises expressing opinion				Percentage of enterprises expressing opinion			
	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know
EUR-11	9	12	36	43	4	11	32	52
By Member State								
België/Belgique	7	44	16	33	6	42	14	38
Danmark	12	15	31	43	11	15	33	41
Elláda	35	29	11	26	25	13	22	40
España	10	23	19	48	3	12	12	73
France	4	10	34	52	2	11	24	63
Ireland	25	20	34	22	10	16	39	34
Italia	31	11	46	12	8	23	49	21
Luxembourg	6	22	19	53	6	15	19	60
Nederland	8	10	27	56	7	11	27	55
Portugal	3	17	45	35	1	10	34	54
United Kingdom	4	5	43	48	3	6	39	53
By Services Sector								
Hotels and restaurants	8	10	28	54	1	13	20	66
Transport, storage and communication	16	12	33	39	11	12	34	43
Financial intermediation	7	17	46	30	3	8	50	39
Property and business activities	7	12	42	38	4	10	39	47
By Employment Size Class								
5-49	9	11	36	44	4	11	32	53
50-199	7	15	36	42	5	14	36	46
200-499	9	18	41	32	5	13	46	36
500-999	9	22	38	31	5	17	43	35
≥ 1,000	13	23	40	25	9	18	42	30

¹ EUR-11 = EUR-12 excluding BR Deutschland.

Source: Eurostat.

Tables S.20. & S.21. Single market's importance to the development of strategy¹

Classification	S.20. Establishment of operations in other EU states				S.21. Distribution networks in other EU states			
	Percentage of enterprises expressing opinion				Percentage of enterprises expressing opinion			
	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know
EUR-11	4	9	31	55	3	9	31	57
By Member State								
België/Belgique	3	39	20	38	4	39	18	39
Danmark	8	11	38	42	0	7	50	43
Elláda	16	16	29	40	17	11	29	42
España	4	9	12	75	2	5	14	78
France	2	10	20	69	2	11	21	66
Ireland	10	14	46	30	8	12	43	37
Italia	12	15	50	23	5	21	50	25
Luxembourg	4	5	18	73	4	12	14	70
Nederland	4	6	25	66	4	3	28	66
Portugal	0	9	35	56	1	8	21	70
United Kingdom	3	5	38	55	2	5	37	55
By Services Sector								
Hotels and restaurants	3	9	20	67	1	11	18	70
Transport, storage and communication	6	10	34	50	8	7	34	51
Financial intermediation	1	9	53	37	2	9	48	41
Property and business activities	4	9	36	51	3	8	39	50
By Employment Size Class								
5-49	4	9	31	56	3	9	31	57
50-199	4	9	36	50	4	9	36	51
200-499	2	12	47	39	1	10	48	41
500-999	4	18	41	37	4	16	42	38
≥ 1,000	9	17	44	30	7	12	49	32

¹ EUR-11 = EUR-12 excluding BR Deutschland.

Source: Eurostat.

Tables S.22. & S.23. Single market's importance to the development of strategy¹

Classification	S.22. Advertising in other EU states				S.23. Purchase of business services from other EU states			
	Percentage of enterprises expressing opinion				Percentage of enterprises expressing opinion			
	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know
EUR-11	3	9	36	52	3	10	34	54
By Member State								
België/Belgique	1	37	19	42	4	34	19	44
Danmark	7	7	42	43	4	6	46	44
Elláda	23	30	19	29	23	21	21	35
España	2	10	15	74	5	12	17	66
France	2	11	41	46	2	11	33	54
Ireland	5	14	46	35	4	12	45	39
Italia	12	19	53	16	5	25	47	24
Luxembourg	2	8	21	69	4	22	25	49
Nederland	2	4	28	66	2	4	25	68
Portugal	0	9	36	55	0	7	30	63
United Kingdom	1	4	40	55	2	3	38	56
By Services Sector								
Hotels and restaurants	4	13	25	57	1	12	19	69
Transport, storage and communication	3	7	38	53	6	10	40	43
Financial intermediation	1	8	49	42	2	7	49	42
Property and business activities	2	8	43	48	4	8	41	47
By Employment Size Class								
5-49	3	10	36	52	3	9	33	55
50-199	3	7	39	52	3	13	42	43
200-499	1	8	51	40	2	11	54	33
500-999	2	10	52	37	1	14	51	33
≥ 1,000	3	12	52	32	5	13	55	26

¹ EUR-11 = EUR-12 excluding BR Deutschland.

Source: Eurostat.

Tables S.24. & S.25. Single market's importance to the development of strategy¹

Classification	S.24. Purchase of financial services from other EU countries				S.25. Direct investment in other companies			
	Percentage of enterprises expressing opinion				Percentage of enterprises expressing opinion			
	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know
EUR-11	3	7	34	56	4	6	28	62
By Member State								
België/Belgique	4	28	16	52	4	36	17	43
Danmark	0	15	42	43	0	5	51	44
Elláda	29	12	27	32	13	23	21	44
España	1	5	18	75	1	4	9	86
France	2	12	30	56	2	11	23	64
Ireland	3	6	44	47	0	9	40	51
Italia	14	10	54	21	19	4	44	33
Luxembourg	0	0	33	67	0	6	18	76
Nederland	2	3	22	74	0	3	26	71
Portugal	0	7	24	68	5	3	21	70
United Kingdom	1	3	38	57	2	3	33	61
By Services Sector								
Hotels and restaurants	4	8	19	70	7	4	14	75
Transport, storage and communication	3	7	38	52	1	7	36	56
Financial intermediation	4	6	47	43	1	9	47	44
Property and business activities	3	6	42	49	4	7	34	55
By Employment Size Class								
5-49	3	7	33	57	4	6	27	63
50-199	1	7	40	52	2	8	35	54
200-499	2	7	52	39	2	12	46	40
500-999	1	8	52	39	4	16	42	38
≥ 1,000	4	8	50	37	6	15	44	35

¹ EUR-11 = EUR-12 excluding BR Deutschland.

Source: Eurostat.

Tables S.26. & S.27. Single market's importance to the development of strategy¹

Classification	S.26. Direct investment from other companies				S.27. Co-operation agreements with other companies			
	Percentage of enterprises expressing opinion				Percentage of enterprises expressing opinion			
	Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know
EUR-11	3	7	27	64	4	8	24	64
By Member State								
België/Belgique	2	35	19	44	4	39	14	43
Danmark	0	5	48	46	0	2	53	45
Elláda	12	16	27	44	28	18	12	42
España	1	5	5	88	7	6	9	78
France	2	11	19	69	2	10	20	68
Ireland	2	9	38	52	5	10	32	53
Italia	12	3	50	35	12	16	41	31
Luxembourg	0	6	18	76	4	6	22	67
Nederland	0	4	20	76	2	10	18	71
Portugal	6	3	19	72	2	4	16	78
United Kingdom	1	5	32	62	2	3	27	67
By Services Sector								
Hotels and restaurants	4	6	17	74	4	8	12	76
Transport, storage and communication	1	6	31	61	4	7	25	63
Financial intermediation	3	9	44	44	2	11	43	44
Property and business activities	2	7	31	59	5	8	31	57
By Employment Size Class								
5-49	3	7	26	65	4	8	23	65
50-199	3	6	34	57	4	11	29	56
200-499	2	6	49	43	3	13	40	44
500-999	2	10	44	44	5	16	40	39
≥ 1,000	3	8	47	42	10	16	38	36

¹ EUR-11 = EUR-12 excluding BR Deutschland.

Source: Eurostat.

Tables S.28. & S.29. Any change in competition levels in the domestic market¹

Classification	S.28. Competitors: domestically owned enterprises			S.29. Competitors: other EU-owned enterprises		
	Percentage of enterprises expressing opinion			Percentage of enterprises expressing opinion		
	Increase	No change	Decrease	Increase	No change	Decrease
EUR-11	30	63	7	21	77	2
<i>By Member State</i>						
België/Belgique	20	78	2	29	70	1
Danmark	23	73	4	13	87	0
Elláda	43	46	11	38	49	13
España	53	37	10	41	59	0
France	42	55	3	35	64	0
Ireland	62	36	2	34	65	2
Italia	23	48	29	17	73	10
Luxembourg	37	57	6	39	59	2
Nederland	26	71	3	15	84	0
Portugal	25	70	5	28	70	2
United Kingdom	22	76	3	10	89	1
<i>By Services Sector</i>						
Hotels and restaurants	22	71	7	11	86	3
Transport, storage and communication	35	55	10	34	65	1
Financial intermediation	30	57	13	36	60	4
Property and business activities	34	61	5	21	77	1
<i>By Employment Size Class</i>						
5-49	30	63	7	20	78	2
50-199	33	61	6	30	68	2
200-499	39	54	7	32	65	3
500-999	31	60	9	39	60	1
≥ 1,000	40	50	10	52	46	1

¹ EUR-11 = EUR-12 excluding BR Deutschland.

Source: Eurostat.

Tables S.30. & S.31. Any change in competition levels in the domestic market¹

Classification	S.30. Competitors: non-EU-owned enterprises			S.31. Price competition: domestically owned enterprises		
	Percentage of enterprises expressing opinion			Percentage of enterprises expressing opinion		
	Increase	No change	Decrease	Increase	No change	Decrease
EUR-11	9	88	2	37	60	3
<i>By Member State</i>						
België/Belgique	9	88	3	25	75	0
Danmark	6	93	1	33	66	1
Elláda	23	67	10	42	40	17
España	13	86	1	59	32	9
France	19	81	0	44	54	2
Ireland	7	88	4	55	42	3
Italia	2	88	10	49	47	4
Luxembourg	13	82	6	27	63	10
Nederland	10	90	0	33	67	0
Portugal	9	89	1	36	63	1
United Kingdom	7	92	2	27	72	1
<i>By Services Sector</i>						
Hotels and restaurants	7	89	3	29	69	2
Transport, storage and communication	12	87	1	42	53	5
Financial intermediation	6	90	4	34	64	2
Property and business activities	10	88	2	43	55	2
<i>By Employment Size Class</i>						
5-49	9	89	2	37	61	3
50-199	12	86	2	44	53	3
200-499	17	81	2	46	51	3
500-999	15	85	0	51	44	4
≥ 1,000	23	74	3	60	37	3

¹ EUR-11 = EUR-12 excluding BR Deutschland.

Source: Eurostat.

Tables S.32. & S.33. Any change in competition levels in the domestic market¹

Classification	S.32. Price competition: other EU-owned enterprises			S.33. Price competition: non-EU-owned enterprises		
	Percentage of enterprises expressing opinion			Percentage of enterprises expressing opinion		
	Increase	No change	Decrease	Increase	No change	Decrease
EUR-11	16	81	3	9	87	3
By Member State						
België/Belgique	24	75	2	9	89	2
Danmark	20	80	0	12	87	1
Elláda	38	47	15	20	66	13
España	27	67	6	14	78	8
France	23	77	1	9	88	2
Ireland	27	70	4	9	89	2
Italia	11	77	12	3	88	10
Luxembourg	29	63	8	15	82	4
Nederland	14	86	0	11	89	0
Portugal	24	76	0	5	95	0
United Kingdom	10	89	1	9	89	2
By Services Sector						
Hotels and restaurants	7	89	4	5	90	5
Transport, storage and communication	29	67	4	15	82	3
Financial intermediation	26	71	2	8	90	2
Property and business activities	17	82	1	11	87	3
By Employment Size Class						
5-49	15	82	3	9	87	4
50-199	28	70	2	13	86	1
200-499	31	68	2	16	82	2
500-999	34	63	3	16	82	3
≥ 1,000	51	48	1	28	71	1

¹ EUR-11 = EUR-12 excluding BR Deutschland.

Source: Eurostat.

Tables S.34. & S.35. Any change in competition levels in the domestic market¹

Classification	S.34. Quality competition: domestically owned enterprises			S.35. Quality competition: other EU-owned enterprises		
	Percentage of enterprises expressing opinion			Percentage of enterprises expressing opinion		
	Increase	No change	Decrease	Increase	No change	Decrease
EUR-11	27	69	4	14	83	3
By Member State						
België/Belgique	20	76	3	19	81	0
Danmark	26	70	4	8	90	1
Elláda	43	49	8	42	51	7
España	41	52	7	26	72	2
France	39	57	4	22	75	3
Ireland	50	49	1	33	65	2
Italia	32	65	3	11	80	10
Luxembourg	35	61	4	29	68	2
Nederland	20	80	1	9	90	2
Portugal	26	68	6	26	72	2
United Kingdom	18	78	4	8	90	2
By Services Sector						
Hotels and restaurants	23	75	2	9	87	3
Transport, storage and communication	31	66	3	21	77	1
Financial intermediation	34	64	1	23	76	1
Property and business activities	27	66	7	14	82	4
By Employment Size Class						
5-49	26	69	4	14	83	3
50-199	29	68	4	21	78	1
200-499	39	56	5	27	72	2
500-999	42	54	4	32	66	2
≥ 1,000	50	47	3	41	58	1

¹ EUR-11 = EUR-12 excluding BR Deutschland.

Source: Eurostat.

Table S.36. Any change in competition levels in the domestic market¹

Classification	Quality competition: non-EU-owned enterprises		
	Percentage of enterprises expressing opinion		
	Increase	No change	Decrease
EUR-11	8	89	3
By Member State			
België/Belgique	6	93	0
Danmark	4	96	0
Elláda	22	70	7
España	11	86	3
France	11	87	2
Ireland	7	91	2
Italia	7	83	10
Luxembourg	15	77	8
Nederland	7	90	3
Portugal	11	87	2
United Kingdom	6	92	2
By Services Sector			
Hotels and restaurants	7	89	4
Transport, storage and communication	11	88	2
Financial intermediation	9	89	2
Property and business activities	8	90	3
By Employment Size Class			
5-49	8	89	3
50-199	9	89	1
200-499	15	83	2
500-999	12	86	2
≥ 1,000	25	74	1

¹ EUR-11 = EUR-12 excluding BR Deutschland.

Source: Eurostat.

Tables S.37. & S.38. Single market legislation as it affects your own firm or sector¹

Classification	S.37. The single market programme has been a success for your firm			S.38. The single market programme has been a success for your sector in your country		
	Percentage of enterprises expressing opinion			Percentage of enterprises expressing opinion		
	Agree	No opinion	Disagree	Agree	No opinion	Disagree
EUR-11	16	63	21	16	62	22
By Member State						
België/Belgique	13	76	10	12	74	15
Danmark	27	54	20	23	59	18
Elláda	49	46	5	54	33	13
España	26	31	43	28	40	31
France	8	61	31	14	40	45
Ireland	22	64	14	26	57	18
Italia	45	38	17	48	41	11
Luxembourg	35	51	14	29	52	19
Nederland	6	72	23	4	75	21
Portugal	1	54	44	11	45	44
United Kingdom	9	79	12	6	81	13
By Services Sector						
Hotels and restaurants	14	68	18	19	63	18
Transport, storage and communication	24	49	27	21	52	27
Financial intermediation	19	60	21	22	58	20
Property and business activities	13	65	21	11	66	23
By Employment Size Class						
5-49	16	63	21	16	62	22
50-199	18	61	21	20	57	23
200-499	17	61	22	20	56	24
500-999	21	54	25	21	50	29
> 1,000	35	46	19	31	45	24

¹ EUR-11 = EUR-12 excluding BR Deutschland.

Source: Eurostat.

Tables S.39. & S.40. Single market legislation as it affects your own firm or sector¹

Classification	S.39. The single market programme has been a success for your sector in the EU			S.40. The single market programme has been successful in eliminating obstacles to EU trade in your sector		
	Percentage of enterprises expressing opinion			Percentage of enterprises expressing opinion		
	Agree	No opinion	Disagree	Agree	No opinion	Disagree
EUR-11	15	71	14	22	65	13
<i>By Member State</i>						
België/Belgique	15	75	10	12	78	10
Danmark	22	59	19	35	47	18
Elláda	31	56	12	34	55	12
España	24	66	10	47	36	17
France	12	62	26	21	58	21
Ireland	26	58	15	32	53	15
Italia	42	48	10	36	48	16
Luxembourg	32	52	16	38	46	16
Nederland	5	76	19	5	78	17
Portugal	4	68	28	13	62	25
United Kingdom	7	82	11	14	79	7
<i>By Services Sector</i>						
Hotels and restaurants	15	75	10	15	73	11
Transport, storage and communication	21	60	19	37	50	13
Financial intermediation	27	57	17	29	53	18
Property and business activities	10	75	15	19	66	14
<i>By Employment Size Class</i>						
5-49	14	72	14	22	65	13
50-199	20	62	17	23	60	17
200-499	18	64	18	23	55	22
500-999	22	56	22	26	54	20
≥ 1,000	33	50	18	38	41	21

¹ EUR-11 = EUR-12 excluding BR Deutschland.

Source: Eurostat.

Tables S.41. & S.42. Single market legislation as it affects your own firm or sector

Classification	S.41. The single market programme has been successful in creating a genuine single market in your sector ¹			S.42 Additional measures are needed to eliminate obstacles to EU trade ²		
	Percentage of enterprises expressing opinion			Percentage of enterprises expressing opinion		
	Agree	No opinion	Disagree	Agree	No opinion	Disagree
EUR-11 (see notes)	6	67	26	18	75	7
By Member State						
België/Belgique	12	75	13	22	73	4
Danmark	14	52	35	25	65	10
Elláda	22	55	23	23	76	2
España	16	42	42	22	61	17
France	3	61	36	23	67	10
Ireland	-	-	-	21	73	6
Italia	13	54	33	48	44	8
Luxembourg	23	57	20	43	43	14
Nederland	2	75	23	6	87	7
Portugal	4	69	28	4	93	3
United Kingdom	2	80	18	11	87	2
By Services Sector						
Hotels and restaurants	2	78	20	14	79	7
Transport, storage and communication	17	57	25	29	62	9
Financial intermediation	8	60	32	20	74	6
Property and business activities	5	64	31	17	78	5
By Employment Size Class						
5-49	6	68	26	18	75	6
50-199	9	63	28	21	71	8
200-499	10	54	36	23	68	8
500-999	10	54	36	24	63	13
≥ 1,000	20	43	38	31	58	11

¹ EUR-10 = EUR-12 excluding BR Deutschland and Ireland.² EUR-11 = EUR-12 excluding BR Deutschland.

Source: Eurostat.

Table S.43. Single market legislation as it affects your own firm or sector¹

Classification	S.43. Additional measures are needed in this sector to create a genuine single market		
	Percentage of enterprises expressing opinion		
	Agree	No opinion	Disagree
EUR-10	17	76	7
By Member State			
België/Belgique	21	76	3
Danmark	20	69	11
Elláda	37	62	1
España	23	63	14
France	17	71	13
Italia	49	40	11
Luxembourg	32	48	20
Nederland	5	88	7
Portugal	13	84	3
United Kingdom	8	89	3
By Services Sector			
Hotels and restaurants	15	78	7
Transport, storage and communication	26	66	8
Financial intermediation	18	74	8
Property and business activities	15	78	7
By Employment Size Class			
5-49	17	76	7
50-199	18	74	8
200-499	20	73	7
500-999	23	62	15
≥ 1,000	28	59	13

¹ EUR-10 = EUR-12 excluding BR Deutschland and Ireland.

Source: Eurostat.

5. Comparison of countries, sectors and size classes

5.1. Structure effect and opinion effect

5.1.1. Definition

To compare the statistics corresponding to, say, different countries, one can use the tables in Chapter 3 and compare the statistics corresponding to the breakdown by country. This is standard practice. However, if the intent is to find out what is specific to the country (other things being equal), one should take care to take into account that the 'structure'² of two countries is not necessarily the same.

For instance, if country A has more small enterprises than country B but a similar composition by sector, we would expect that at the country level, the average opinion in country A is closer to the opinion of small enterprises than in country B. In a similar way, if country A has a higher proportion than country B of economic sectors which, on average, express more favourable opinions than other economic sectors, we expect that at the country level, the average opinion will be more favourable. This is what we call a 'structure effect'.

An 'opinion effect' greater (or less) than 1 would, on the contrary, indicate that if country A has more (or less) favourable opinions than country B, it is due to the fact that it has on average more (respectively less) favourable opinions at the level of the elementary strata (defined by a size class and a sector of activity) than country B.

So, we can define indicators of these size effects to check the importance of the structure effect and opinion effect for such comparisons. See Chapter 8 for the precise definition.

What has been explained above about the comparison of countries applies in a similar way to the comparison of sectors or size classes. If we want to compare two sectors of activity, we have to take into account that these sectors may have different 'structures', where 'structures' refers to the breakdown by country and size class. For comparisons of size classes, we have to consider the breakdown by country and sector of activity of these size classes.

5.1.2. Overview of results

It appears that the structure effect has in general a limited influence on the comparisons of countries, sectors or size classes. It generally does not modify the ranking of categories within EUR-12, but may slightly modify the distance between two countries with similar opinions. This remains true also for the comparison of sectors or size classes.

² The 'structure' of a country is characterized by the importance of the different size classes and sectors in the composition of the total population of businesses in this country.

For example, if one considers the opinions regarding 'Harmonization of technical regulations and/or standards' in the manufacturing sector (Table M.1, see Section 3.1), we can compare all the opinions of Member States with the EUR-12 average (or another aggregate) by dividing for each opinion (Positive Impact, No Impact, Negative Impact, Don't Know) the percentage of enterprises expressing it by the corresponding value for EUR-12; we refer to this as the index (first three columns in the tables presented in Section 5.2). Using this index, we can rank the different Member States for each opinion. Secondly, we can calculate the opinion effect for each modality and each country, i.e. calculate the ratio between the observed percentages of EUR-12 and the percentages that would be obtained by an imaginary country that would have the same structure of its enterprises' population by sector of activity and size class as EUR-12, but for which the opinions expressed in each elementary cell defined by the sector and size class breakdown would have the same pattern as in the original country. We can then again rank these opinion effects and get a second ranking which compares the opinion patterns of Member States after having removed the impact of the differences in the structure of the enterprise population. The third characteristic 'structure effect' measures directly the influence of the differences in structure compared with the EUR-12 population.

The table below gives an example of ranking:

Table 5.1. Example of opinion effect and structure effect for the percentage of enterprises expressing that the 'Harmonization of technical regulations and/or standards has had a positive impact'

Member State	Index	Original 'ranking' of opinions	Opinion effect	'Ranking' after ... ¹	Structure effect
België/Belgique	0.51	12	0.53	11	0.96
Danemark	0.84	7	0.79	7	1.07
BR Deutschland	0.63	10	0.59	10	1.06
Elláda	1.54	1	1.55	1	1.00
España	1.28	4	1.34	4	0.95
France	1.00	6	1.00	6	1.00
Ireland	1.42	2	1.35	4	1.05
Italia	1.35	3	1.39	2	0.97
Luxembourg	0.53	11	0.33	12	1.62
Nederland	0.78	9	0.69	9	1.13
Portugal	1.18	5	1.36	3	0.87
United Kingdom	0.81	8	0.79	7	1.03

¹ ...adjustment for structure effect, i.e. according to the opinion effect.

Source: Eurostat.

We see that the ranking is slightly modified for some countries, but that the changes are very minor, except for Portugal.

5.2. Tables

Table I M.1. Manufacturing: Structure effect and opinion effect. Single market legislation as it affects your own firm or sector. The single market programme has been successful in eliminating obstacles to EU trade in your sector

(Relative index)

Percentage of enterprises expressing opinion									
Classification	Index			Opinion effect			Structure effect		
	Agree	No opinion	Disagree	Agree	No opinion	Disagree	Agree	No opinion	Disagree
<i>Comparison of national opinion with the European mean opinion</i>									
België/Belgique	0.59	1.62	0.61	0.60	1.63	0.59	0.99	1.00	1.04
Danmark	0.87	0.95	1.36	0.87	0.95	1.34	0.99	1.00	1.02
BR Deutschland	0.88	1.19	0.87	0.84	1.27	0.80	1.05	0.94	1.10
Elláda	1.17	0.97	0.73	1.08	1.00	0.84	1.09	0.97	0.86
España	1.59	0.55	0.69	1.65	0.50	0.66	0.96	1.09	1.05
France	0.86	0.96	1.36	0.89	0.91	1.40	0.97	1.05	0.97
Ireland	1.59	0.71	0.39	1.56	0.76	0.32	1.02	0.93	1.24
Italia	1.23	0.56	1.39	1.26	0.54	1.37	0.98	1.03	1.01
Luxembourg	0.59	0.98	1.86	0.46	0.64	2.00	1.27	1.53	0.93
Nederland	0.68	1.48	0.71	0.56	1.64	0.59	1.23	0.90	1.20
Portugal	1.09	0.99	0.83	1.09	0.96	0.88	1.01	1.03	0.94
United Kingdom	0.65	1.53	0.68	0.63	1.58	0.61	1.03	0.96	1.11
<i>Comparison of Manufacturing sector opinion with the European mean opinion</i>									
Food, beverages and tobacco	1.13	0.92	0.98	1.19	0.92	0.78	0.96	1.00	1.14
Textiles, leather and furniture	1.07	0.91	1.04	0.99	1.01	1.00	1.08	0.90	1.04
Wood, paper and printing/publishing	0.81	1.22	0.95	0.85	1.12	1.05	0.95	1.09	0.91
Chemicals, rubber and plastics	1.01	0.99	1.01	0.99	0.98	1.05	1.02	1.01	0.96
Non-metallic mineral products	0.77	1.22	1.05	0.71	1.26	1.06	1.08	0.96	0.99
Metals and metal products	0.90	1.14	0.93	0.92	1.10	0.96	0.98	1.03	0.97
Machinery and equipment NEC	1.07	0.90	1.04	1.12	0.88	0.98	0.95	1.03	1.06
Electrical and optical machinery	1.26	0.77	0.92	1.30	0.76	0.87	0.98	1.02	1.05
Transport equipment	0.77	0.98	1.49	0.78	1.09	1.25	0.98	0.90	1.20
<i>Comparison of Employment Size Class opinion with the European mean opinion</i>									
20-49	0.94	1.07	0.97	0.91	1.12	0.93	1.04	0.95	1.04
50-199	1.08	0.92	0.98	1.11	0.88	1.01	0.98	1.05	0.98
200-499	1.06	0.80	1.26	1.11	0.72	1.29	0.95	1.10	0.98
500-999	1.12	0.84	1.05	1.20	0.77	0.99	0.93	1.09	1.06
≥ 1,000	1.16	0.78	1.10	1.16	0.67	1.13	1.00	1.16	0.97

Source: Eurostat.

Table I D.1. Distributive trade: Structure effect and opinion effect. Single market legislation as it affects your own firm or sector. The single market programme has been successful in eliminating obstacles to EU trade in your sector

(Relative index)

Percentage of enterprises expressing opinion									
Classification	Index			Opinion effect			Structure effect		
	Agree	No opinion	Disagree	Agree	No opinion	Disagree	Agree	No opinion	Disagree
<i>Comparison of national opinion with the European mean opinion</i>									
België/Belgique	0.68	1.26	0.52	0.59	1.28	0.59	1.16	0.98	0.88
Danmark	0.95	0.82	1.88	1.01	0.85	1.62	0.94	0.96	1.16
BR Deutschland	1.04	1.05	0.73	1.04	1.04	0.73	1.00	1.00	1.00
Elláda	1.88	0.57	1.10	1.86	0.58	1.09	1.01	0.98	1.00
España	2.09	0.58	0.66	2.10	0.57	0.66	0.99	1.01	1.00
France	0.90	1.09	0.78	0.95	1.02	1.03	0.95	1.08	0.76
Ireland	1.43	0.84	0.83	1.52	0.79	0.87	0.94	1.07	0.95
Italia	1.00	0.72	2.20	1.10	0.66	2.27	0.91	1.09	0.97
Luxembourg	1.23	0.60	2.26	1.19	0.61	2.26	1.03	0.98	1.00
Nederland	0.69	1.11	1.12	0.57	1.18	1.06	1.20	0.94	1.06
Portugal	1.21	0.78	1.52	1.17	0.81	1.46	1.03	0.97	1.04
United Kingdom	0.51	1.30	0.68	0.50	1.30	0.69	1.02	1.00	0.98
<i>Comparison of Services sector opinion with the European mean opinion</i>									
Wholesaling and motor vehicles	1.08	0.91	1.22	1.11	0.91	1.18	0.98	1.00	1.04
Retail trade	0.93	1.07	0.83	0.92	1.05	0.93	1.01	1.02	0.88
<i>Comparison of Employment Size Class opinion with the European mean opinion</i>									
20-49	0.99	1.01	0.97	0.99	1.01	0.97	1.00	1.00	1.00
50-199	1.15	0.79	1.60	1.28	0.76	1.47	0.89	1.04	1.09
200-499	1.30	0.87	0.98	1.46	0.83	0.82	0.89	1.05	1.20
500-999	1.11	0.62	2.43	1.02	0.55	2.69	1.08	1.12	0.90
≥ 1,000	1.20	0.92	0.94	1.39	0.74	1.10	0.86	1.25	0.86

Source: Eurostat.

Table I S.1. Other services: Structure effect and opinion effect.¹ Single market legislation as it affects your own firm or sector. The single market programme has been successful in eliminating obstacles to EU trade in your sector

(Relative index)

Percentage of enterprises expressing opinion									
Classification	Index			Opinion effect			Structure effect		
	Agree	No opinion	Disagree	Agree	No opinion	Disagree	Agree	No opinion	Disagree
<i>Comparison of national opinion with the European mean opinion</i>									
België/Belgique	0.56	1.21	0.72	0.54	1.22	0.69	1.04	0.99	1.05
Danmark	1.62	0.72	1.34	1.72	0.73	1.12	0.94	0.98	1.19
Elláda	1.55	0.84	0.88	1.49	0.80	1.13	1.03	1.05	0.78
España	2.14	0.56	1.27	2.08	0.57	1.32	1.03	0.98	0.96
France	0.95	0.90	1.58	0.97	0.89	1.55	0.97	1.00	1.02
Ireland	1.49	0.81	1.11	1.56	0.79	1.09	0.96	1.02	1.02
Italia	1.66	0.74	1.18	1.26	0.79	1.58	1.31	0.94	0.74
Luxembourg	1.74	0.71	1.18	1.53	0.71	1.44	1.14	1.01	0.82
Nederland	0.22	1.21	1.27	0.14	1.20	1.39	1.57	1.00	0.92
Portugal	0.61	0.95	1.89	0.75	0.92	1.79	0.81	1.03	1.06
United Kingdom	0.64	1.22	0.54	0.67	1.20	0.55	0.95	1.01	0.99
<i>Comparison of Manufacturing sector opinion with the European mean opinion</i>									
Hotels and restaurants	0.70	1.13	0.84	0.67	1.12	0.92	1.04	1.01	0.92
Transport, storage and communication	1.68	0.77	1.00	1.51	0.84	0.94	1.12	0.92	1.06
Financial intermediation	1.31	0.82	1.35	1.26	0.86	1.24	1.04	0.96	1.09
Property and business activities	0.89	1.02	1.08	0.92	0.99	1.18	0.97	1.03	0.91
<i>Comparison of Employment Size Class opinion with the European mean opinion</i>									
20-49	0.99	1.01	0.97	1.00	1.01	0.97	1.00	1.00	0.99
50-199	1.05	0.93	1.28	1.03	0.94	1.24	1.02	0.98	1.04
200-499	1.04	0.85	1.65	0.95	0.81	1.62	1.09	1.05	1.02
500-999	1.19	0.83	1.52	1.14	0.84	1.30	1.05	0.99	1.16
≥ 1,000	1.74	0.63	1.60	1.39	0.69	1.68	1.26	0.91	0.95

¹ EUR-11 = EUR-12 excluding BR Deutschland.

Source: Eurostat.

6. Multidimensional analysis

The analysis of correlations (Section 6.1) and the correspondence analysis (Section 6.2) show among other results the homogeneity within blocks of questions. In Section 6.3, one variable from each block was chosen to build a cross-tabulation (the variable most representative of responses within the relevant block). Finally in Section 6.4, a correspondence analysis was applied to each block of questions.

6.1. Correlations

To analyse the links between characteristics, we first decomposed each characteristic into a set of three or four dummy variables, one for each response category of each question. We then calculated the correlations for all pairs of dummy variables. No pair of variables, including two dummies coming from different blocks, was found to have a correlation coefficient higher than 0.5 (a block³ is the set of all questions listed in the same part of the questionnaire).

This gave a first hint that further analysis of the questionnaire was easier when performed block by block.

6.2. Correspondence analysis of all characteristics

To study further the links between the characteristics, we used Multiple Correspondence Analysis methods (CORRESP procedure in the SAS software, MCA option) for the Manufacturing Sector. This technique is similar to Principal Component Analysis but designed for non-quantitative characteristics. It performs a principal component analysis of a cross-frequency table called a 'Burt' table.

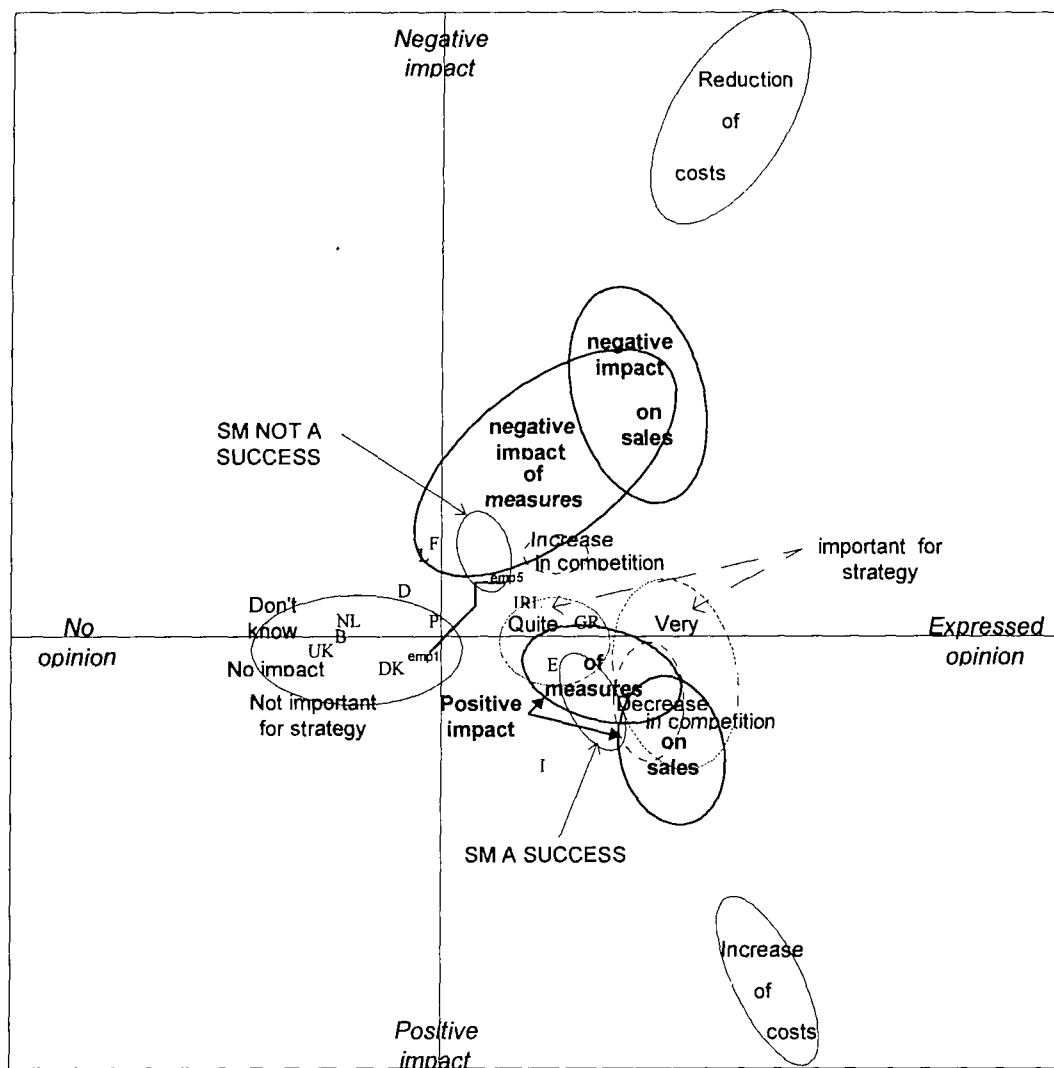
All dummies' characteristics described in Section 6.1 above were then projected along the principal axes 1, 2 and 3. If we consider the two subspaces defined respectively by axes 1, 2 and axes 1, 3, we observe the following features.

Nearly all dummies corresponding to the same block are projected in the same area. This is valid for subspace 1, 2 and 1, 3. Therefore, these groups of dummies are pictured by ellipses.

The first axis can be characterized as the axis of expression of opinion, the second axis as the axis of global judgement on the impact of the single market programme. The proximities of the characteristics representing the country dimension with either the ellipses 'don't know - no impact' for the United Kingdom, Belgium, the Netherlands, Portugal seems stable. Similarly, Italy is an outlier in the area of positive opinions; these are expressed with some strength. There is a strong consistency between the blocks of opinions concerning the impact of the SM on sales (frame Q2.2), the impact of measures (frame Q2.1) and the global opinion (frame Q4). The increase in competition is rather associated with negative impact in the eyes of firms. There is little link between the opinion on the impact of the single market measures or programme and the judgement on the influence on strategy (frame Q2.3). The opinion on

³ We considered the blocks corresponding to the frames Q2.1, Q2.2, Q2.3, Q2.4, Q3.2, Q4 for the manufacturing sector and to frames Q2.1, Q2.2, Q2.3, Q2.4, Q3 for the services sector (see questionnaires in Chapter 7).

variations in costs seems not very connected with any opinion, since it is associated once with negative impact (axis 2), and once with positive impact (axis 3) when we consider only the first two subspaces defined by axes 1, 2 and axes 1, 3 respectively. The use of the third subspace generated by axes 2 and 3 explains this strange link between the opinion on costs and other opinions: when projected onto axis 2, 'increase of costs' is projected close to 'positive impact', as it appears in Figure 6.1. When projected onto axis 3, 'increase of costs' is close to 'negative impact', as it appears in Figure 6.2. Similarly, the link between the size of the companies (broken line from emp1 to emp5) indicates a positive correlation between size and positive opinion in Figure 6.2 but a negative one in Figure 6.1, resulting in an ambiguous relation which is explained by Figure 6.3: the different size classes of enterprises seem to differentiate more along their opinion of costs' variations than along other questions.

Figure 6.1. Principal axes 1 & 2

The terms in *italics* are subjective titles given to the axes.

B: Belgium (België), DK: Denmark (Danmark), D: Germany (BR Deutschland), GR: Greece (Elláda), E: Spain (España), F: France, IRL: Ireland, I: Italy (Italia), L: Luxembourg, N: Netherlands (Nederland), P: Portugal, UK: United Kingdom. emp1 (resp. emp5) refers to the stratum of the smaller (resp. bigger) companies with less than 50 employees (resp. 1,000 or more). Other size classes are represented by discontinuities of the broken line.

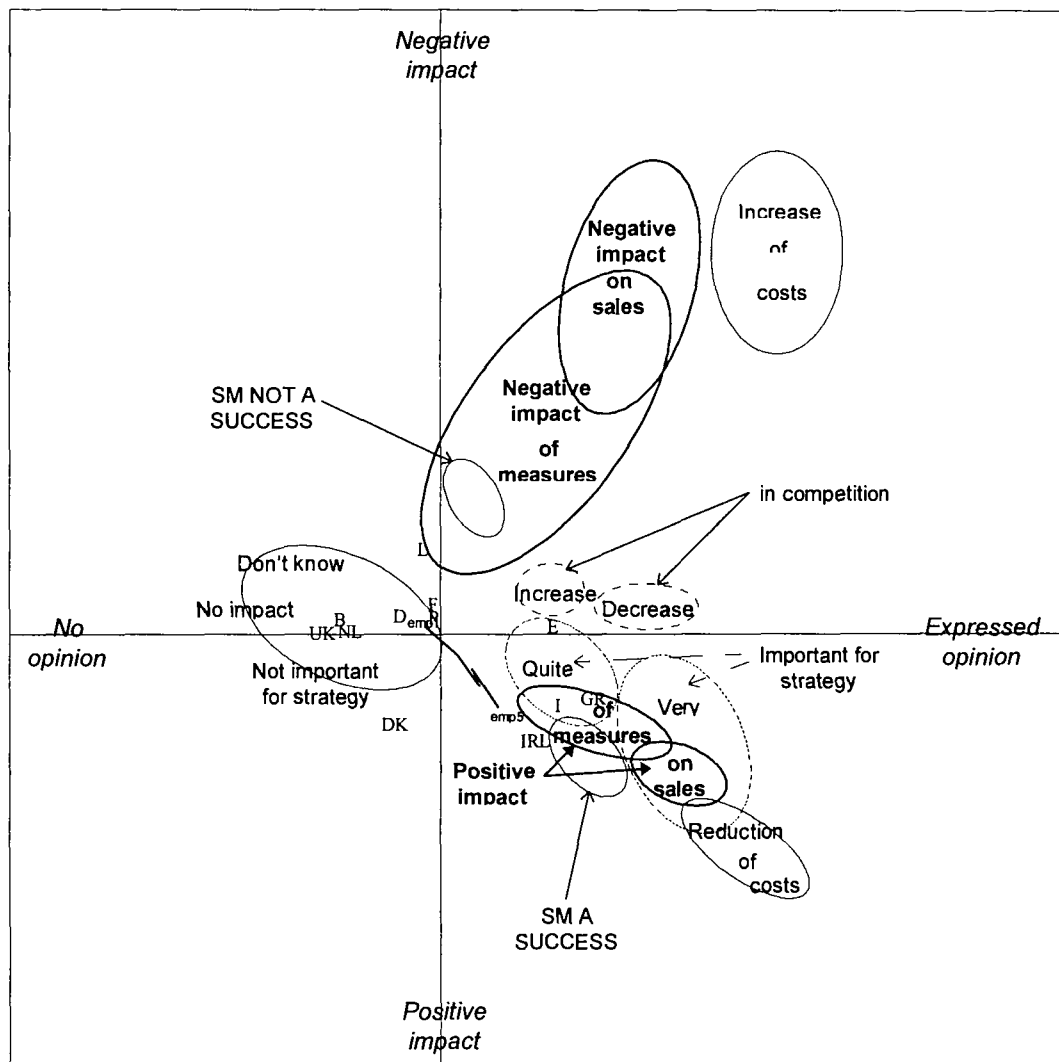
Don't know and **No impact** refer to the corresponding modalities for all questions.

Positive/ Negative impact of measures refers to frame Q2.1. **Positive/ Negative impact on sales** refers to frame Q2.2

Very/ Quite important for strategy refers to frame Q2.3. **Increase/ Decrease in competition** refers to frame Q2.4

Increase/ Reduction of costs refers to frames Q3.1 and Q3.2. **SM (not) a success** refers to the questions in frame Q3

Note: questions of frame Q3.2 were plotted on the MCA graphs after combination with answers to frame Q3.1. Characteristic Country, Size Class and Importance for Strategy were projected as supplementary characteristics. The inertia corresponding to the first three axes is respectively 10.6%, 6.2% and 6%. The analysis was carried out on 118 active characteristics and 74 supplementary characteristics.

Figure 6.2. Principal axes 1 & 3

The terms in italics are subjective titles given to the axes.

The letters B, D, etc. refer to standard abbreviations of country names (see Figure 6.1 for additional details).

emp1 (resp. emp5) refers to the stratum of the smaller (resp. bigger) companies with less than 50 employees (1,000 or more). Other size classes are represented by discontinuities of the broken line.

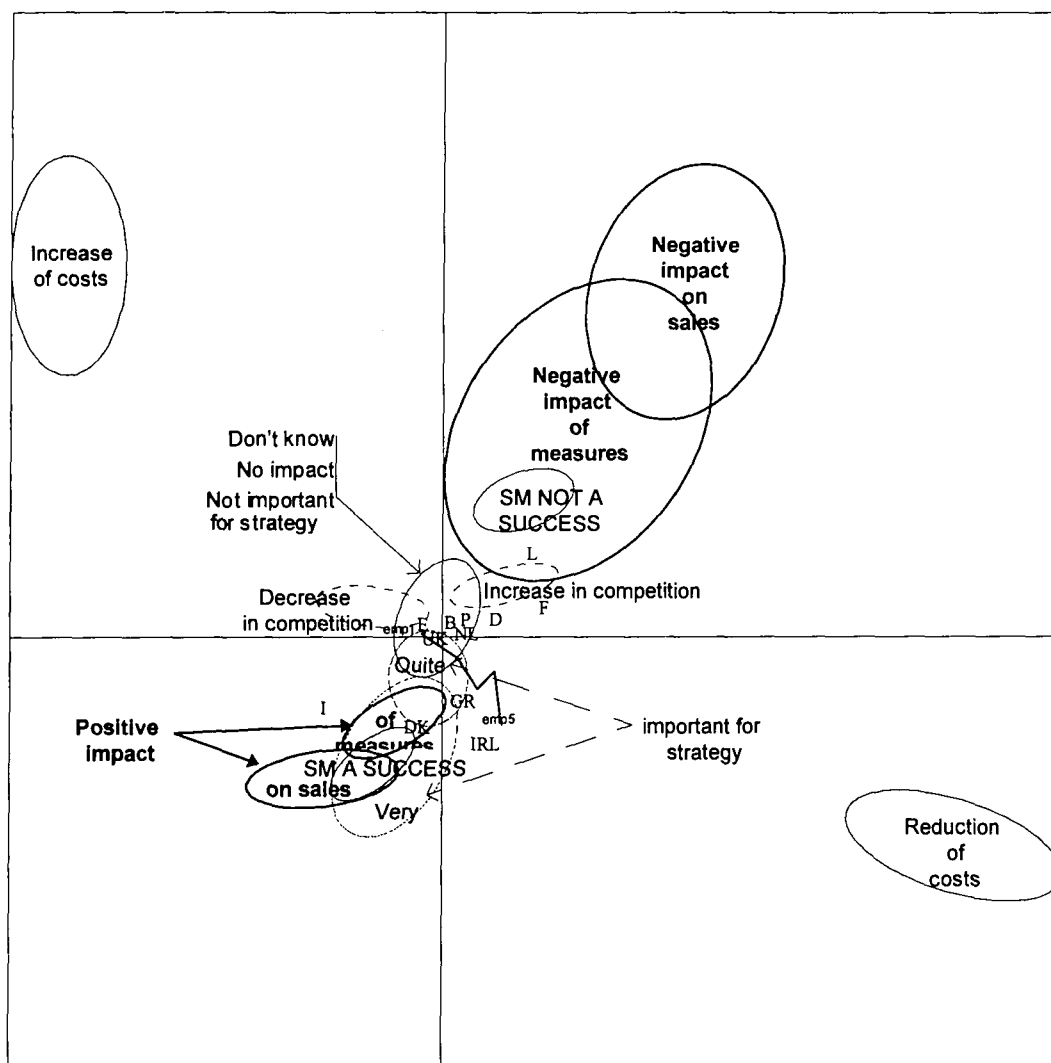
Don't know and **No impact** refer to the corresponding modalities for all questions.

Positive/ Negative impact of measures refers to frame Q2.1. **Positive/ Negative impact on sales** refers to frame Q2.2

Very/ Quite important for strategy refers to frame Q2.3. **Increase/ Decrease in competition** refers to frame Q2.4

Increase/ Reduction of costs refers to frames Q3.1 and Q3.2. **SM (not) a success** refers to the questions in frame Q3

Figure 6.3. Principal axes 2 & 3



The letters B, D, etc. refer to standard abbreviations of country names (see Figure 6.1 for additional details).

emp1 (resp. emp5) refers to the stratum of the smaller (resp. bigger) companies with less than 50 employees (1,000 or more). Other size classes are represented by discontinuities of the broken line.

Don't know and **No impact** refer to the corresponding modalities for all questions.

Positive/ Negative impact of measures refers to frame Q2.1. **Positive/ Negative impact on sales** refers to frame Q2.2

Very/ Quite important for strategy refers to frame Q2.3. **Increase/ Decrease in competition** refers to frame Q2.4

Increase/ Reduction of costs refers to frames Q3.1 and Q3.2. **SM (not) a success** refers to the questions in frame Q3

6.3. Cross-tabulation of a selection of characteristics

Since the MCA showed higher intra-block homogeneity, and some complexity in the correlation between blocks, it appeared that the dimension of the answers to the questionnaire could be reduced by selecting a reference variable in each block and by cross-tabulating these characteristics.

The reference characteristic chosen was the variable in each block that was closest to the average pattern of response for that block. In most cases, that reference variable was the same when the responses were weighted by the number of firms or by the employment. These cross-tables are given below.

Table CT M.1.a. Manufacturing: Cross-tabulation of selected characteristics

(hundreds of enterprises weighted by percentage of enterprises expressing opinion)

Category	Response category	Single market's impact on your firm - Mutual recognition of technical regulations and/or standards				Single market's impact on your company's operations - Profitability			
		Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know
Single market's impact on your firm - Mutual recognition of technical regulations and/or standards	Positive impact	568	0	0	0	148	326	70	24
	No impact	0	883	0	0	101	673	86	23
	Negative impact	0	0	123	0	11	64	44	5
	Don't know	0	0	0	210	22	109	23	56
Single market's impact on your company's operations - Profitability	Positive impact	148	101	11	22	282	0	0	0
	No impact	326	673	64	109	0	1171	0	0
	Negative impact	70	86	44	23	0	0	223	0
	Don't know	24	23	5	56	0	0	0	108
Single market's importance to development of strategy - Distribution networks in other EU markets	Very important	59	22	9	12	37	47	13	4
	Quite important	123	130	15	21	75	162	40	12
	Not important	276	453	67	71	134	606	100	27
	Don't know	110	278	32	106	36	356	69	65
Any change in competition levels in the domestic market - Quality competition: other EU-owned firms	Increase	217	209	39	56	105	283	108	25
	No change	338	655	82	149	172	864	106	82
	Decrease	13	19	3	5	5	24	9	2
The extent to which the implementation of the single market has affected - Unit cost of typical or average product	Increase	113	108	16	24	75	122	58	6
	No change	270	506	52	114	83	720	80	59
	Reduction	101	101	30	25	64	122	61	9
	Don't know	84	168	26	47	60	207	23	35
Importance in changing unit costs - Testing and certification	Very important	62	34	27	7	37	61	29	4
	Quite important	107	79	10	14	53	110	40	7
	Not important	176	373	28	84	106	450	78	25
	Don't know	223	398	59	105	86	551	76	72
Single market's legislation as it affects your firm/sector - Single market has been a success for your sector or firm in the EU	Agree	253	189	29	40	159	280	54	19
	No opinion	217	511	55	129	88	652	99	74
	Disagree	98	183	39	41	35	240	70	16

Source: Eurostat.

Table CT M.b. Manufacturing: Cross-tabulation of selected characteristics*(hundreds of enterprises weighted by percentage of enterprises expressing opinion)*

Category	Response category	Single market's importance to development of strategy -				Any change in competition levels in the domestic market -		
		Distribution networks in other EU markets				Quality competition: other EU-owned firms		
		Very important	Quite important	Not important	Don't know	Increase	No change	Decrease
Single market's impact on your firm - Mutual recognition of technical regulations and/or standards	Positive impact	59	123	276	110	217	338	13
	No impact	22	130	453	278	209	655	19
	Negative impact	9	15	67	32	39	82	3
	Don't know	12	21	71	106	56	149	5
Single market's impact on your company's operations - Profitability	Positive impact	37	75	134	36	105	172	5
	No impact	47	162	606	356	283	864	24
	Negative impact	13	40	100	69	108	106	9
	Don't know	4	12	27	65	25	82	2
Single market's importance to development of strategy - Distribution networks in other EU markets	Very important	102	0	0	0	52	45	5
	Quite important	0	289	0	0	112	174	3
	Not important	0	0	868	0	234	613	20
	Don't know	0	0	0	527	123	391	12
Any change in competition levels in the domestic market - Quality competition: other EU-owned firms	Increase	52	112	234	123	521	0	0
	No change	45	174	613	391	0	1224	0
	Decrease	5	3	20	12	0	0	40
The extent to which the implementation of the single market has affected - Unit cost of typical or average product	Increase	18	54	129	61	114	139	9
	No change	44	118	483	298	223	703	16
	Reduction	28	60	112	57	113	136	7
	Don't know	12	58	144	112	72	246	7
Importance in changing unit costs - Testing and certification	Very important	21	29	59	22	58	65	7
	Quite important	22	50	94	43	98	106	5
	Not important	29	86	343	203	172	475	13
	Don't know	31	124	372	259	193	578	14
Single market's legislation as it affects your firm/sector - Single market has been a success for your sector or firm in the EU	Agree	57	126	263	66	197	305	10
	No opinion	34	104	402	372	211	680	21
	Disagree	12	59	202	88	113	239	9

Source: Eurostat.

Table CT M.1.c. Manufacturing: Cross-tabulation of selected characteristics*(hundreds of enterprises weighted by percentage of enterprises expressing opinion)*

Category	Response category	The extent to which the implementation of the single market programme has affected -				Importance in changing unit costs -			
		Unit cost of typical or average product				Testing and certification			
		Increase	No change	Reduction	Don't know	Very important	Quite important	Not important	Don't know
Single market's impact on your firm - Mutual recognition of technical regulations and/or standards	Positive impact	113	270	101	84	62	107	176	223
	No impact	108	506	101	168	34	79	373	398
	Negative impact	16	52	30	26	27	10	28	59
	Don't know	24	114	25	47	7	14	84	105
Single market's impact on your company's operations - Profitability	Positive impact	75	83	64	60	37	53	106	86
	No impact	122	720	122	207	61	110	450	551
	Negative impact	58	80	61	23	29	40	78	76
	Don't know	6	59	9	35	4	7	25	72
Single market's importance to development of strategy - Distribution networks in other EU markets	Very important	18	44	28	12	21	22	29	31
	Quite important	54	118	60	58	29	50	86	124
	Not important	129	483	112	144	59	94	343	372
	Don't know	61	298	57	112	22	43	203	259
Any change in competition levels in the domestic market - Quality competition: other EU-owned firms	Increase	114	223	113	72	58	98	172	193
	No change	139	703	136	246	65	106	475	578
	Decrease	9	16	7	7	7	5	13	14
The extent to which the implementation of the single market has affected - Unit cost of typical or average product	Increase	262	0	0	0	60	77	116	8
	No change	0	942	0	0	27	69	366	480
	Reduction	0	0	257	0	38	57	154	8
	Don't know	0	0	0	325	5	6	24	290
Importance in changing unit costs - Testing and certification	Very important	60	27	38	5	131	0	0	0
	Quite important	77	69	57	6	0	209	0	0
	Not important	116	366	154	24	0	0	660	0
	Don't know	8	480	8	290	0	0	0	785
Single market's legislation as it affects your firm/sector - Single market has been a success for your sector or firm in the EU	Agree	108	240	102	62	60	78	187	186
	No opinion	98	513	98	203	42	87	321	462
	Disagree	55	189	58	60	29	43	152	137

Source: Eurostat.

Table CT M.1.d. Manufacturing: Cross-tabulation of selected characteristics*(hundreds of enterprises weighted by percentage of enterprises expressing opinion)*

Category	Response category	Single market legislation as it affects your firm or sector-		
		The single market programme has been a success for your sector in the EU		
		Agree	No opinion	Disagree
Single market's impact on your firm - Mutual recognition of technical regulations and/or standards	Positive impact	253	217	98
	No impact	189	511	183
	Negative impact	29	55	39
	Don't know	40	129	41
Single market's impact on your company's operations - Profitability	Positive impact	159	88	35
	No impact	280	652	240
	Negative impact	54	99	70
	Don't know	19	74	16
Single market's importance to development of strategy - Distribution networks in other EU markets	Very important	57	34	12
	Quite important	126	104	59
	Not important	263	402	202
	Don't know	66	372	88
Any change in competition levels in the domestic market - Quality competition: other EU-owned firms	Increase	197	211	113
	No change	305	680	239
	Decrease	10	21	9
The extent to which the implementation of the single market has affected - Unit cost of typical or average product	Increase	108	98	55
	No change	240	513	189
	Reduction	102	98	58
	Don't know	62	203	60
Importance in changing unit costs - Testing and certification	Very important	60	42	29
	Quite important	78	87	43
	Not important	187	321	152
	Don't know	186	462	137
Single market's legislation as it affects your firm/sector - Single market has been a success for your sector or firm in the EU	Agree	512	0	0
	No opinion	0	912	0
	Disagree	0	0	361

Source: Eurostat.

Table CT S.1.a. Other services: Cross-tabulation of selected characteristics¹*(hundreds of enterprises weighted by percentage of enterprises expressing opinion)*

Category	Response category	Single market's impact on your firm - Recognition of licences / authorizations in other EU states				Single market's impact on your company's operations - Productivity			
		Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know
Single market's impact on your firm - Recognition of licences/authorizations in other EU states	Positive impact	438	0	0	0	148	249	30	11
	No impact	0	2,682	0	0	158	2,345	74	105
	Negative impact	0	0	140	0	42	62	34	1
	Don't know	0	0	0	470	28	252	17	172
Single market's impact on your company's operations - Productivity	Positive impact	148	158	42	28	377	0	0	0
	No impact	249	2,345	62	252	0	2,908	0	0
	Negative impact	30	74	34	17	0	0	155	0
	Don't know	11	105	1	172	0	0	0	290
Single market's importance to development of strategy - Increase in cross-border provision of services to other EU states	Very important	84	52	6	13	53	84	11	8
	Quite important	82	300	9	38	94	260	19	56
	Not important	99	960	43	94	61	1,046	66	23
	Don't know	173	1,370	82	325	169	1,519	59	203
Any change in competition levels in the domestic market - Quality competition: other EU-owned firms	Increase	174	259	51	52	133	330	27	46
	No change	250	2,345	79	405	192	2,543	107	236
	Decrease	14	79	10	13	52	35	20	8
Single market's legislation as it affects your firm/sector - Single market has been a success for your sector or firm in the EU	Agree	155	305	53	43	188	285	31	53
	No opinion	232	1,984	47	382	174	2,196	68	208
	Disagree	51	393	40	44	16	428	57	29

¹ EUR-11 = EUR-12 excluding BR Deutschland.

Source: Eurostat.

Table CT S.1.b. Other services: Cross-tabulation of selected characteristics¹*(hundreds of enterprises weighted by percentage of enterprises expressing opinion)*

Category	Response category	Single market's importance to development of strategy - Increase in cross-border provision of services to other EU states				Any change in competition levels in the domestic market - Quality competition: other EU states		
		Very important	Quite important	Not important	Don't know	Increase	No change	Decrease
Single market's impact on your firm - Recognition of licences/authorizations in other EU states	Positive impact	84	82	99	173	174	250	14
	No impact	52	300	960	1370	259	2,345	79
	Negative impact	6	9	43	82	51	79	10
	Don't know	13	38	94	325	52	405	13
Single market's impact on your company's operations - Productivity	Positive impact	53	94	61	169	133	192	52
	No impact	84	260	1,046	1,519	330	2,543	35
	Negative impact	11	19	66	59	27	107	20
	Don't know	8	56	23	203	46	236	8
Single market's importance to development of strategy - Increase in cross-border provision of services to other EU states	Very important	156	0	0	0	66	89	1
	Quite important	0	429	0	0	79	308	42
	Not important	0	0	1,196	0	193	957	46
	Don't know	0	0	0	1,950	198	1,726	27
Any change in competition levels in the domestic market - Quality competition: other EU-owned firms	Increase	66	79	193	198	536	0	0
	No change	89	308	957	1,726	0	3,079	0
	Decrease	1	42	46	27	0	0	116
Single market's legislation as it affects your firm/sector - Single market has been a success for your sector or firm in the EU	Agree	96	147	153	160	193	322	41
	No opinion	43	228	799	1,575	251	2,346	49
	Disagree	17	54	243	215	92	411	26

¹ EUR-11 = EUR-12 excluding BR Deutschland.

Source: Eurostat.

Table CT S.1.c. Other services: Cross-tabulation of selected characteristics¹*(hundreds of enterprises weighted by percentage of enterprises expressing opinion)*

Category	Response category	Single market legislation as it affects your own firm or sector - The single market programme has been a success for your sector in the EU		
		Agree	No opinion	Disagree
Single market's impact on your firm - Recognition of licences/authorizations in other EU states	Positive impact	155	232	51
	No impact	305	1,984	393
	Negative impact	53	47	40
	Don't know	43	382	44
Single market's impact on your company's operations - Productivity	Positive impact	188	174	16
	No impact	285	2,196	428
	Negative impact	31	68	57
	Don't know	53	208	29
Single market's importance to development of strategy - Increase in cross-border provision of services to other EU states	Very important	96	43	17
	Quite important	147	228	54
	Not important	153	799	243
	Don't know	160	1,575	215
Any change in competition levels in the domestic market - Quality competition: other EU-owned firms	Increase	193	251	92
	No change	322	2,346	411
	Decrease	41	49	26
Single market's legislation as it affects your firm/sector - Single market has been a success for your sector or firm in the EU	Agree	556	0	0
	No opinion	0	2,645	0
	Disagree	0	0	529

¹ EUR-11 = EUR-12 excluding BR Deutschland.

Source: Eurostat.

6.4. Multidimensional analysis by block of homogeneous questions (Manufacturing)

This section addresses corporate profile by branch of industry. Possible replies to each question are divided into three or four logical variables (values 0 and 1) which are subsequently cross-matched with the branch of industry. This produces a contingency table in which the rows are the types of reply and the columns the branches of industry. The intersection of a row (type of reply) and a column indicates the number of companies which have selected a particular reply and belong to the particular branch of industry represented by the column.

This table was subjected to a correspondence analysis. This analysis allows to compare the sectors between them, the replies between them and to represent all these elements in spaces of reduced dimensions in order to obtain a good visual representation.

A correspondence analysis was applied to each block of questions: from the set of questions about the impact of measures on firms' activities to the legislation block. The codification of questions and replies is explained under each graph.

6.4.1. Impact of measures on companies' activities

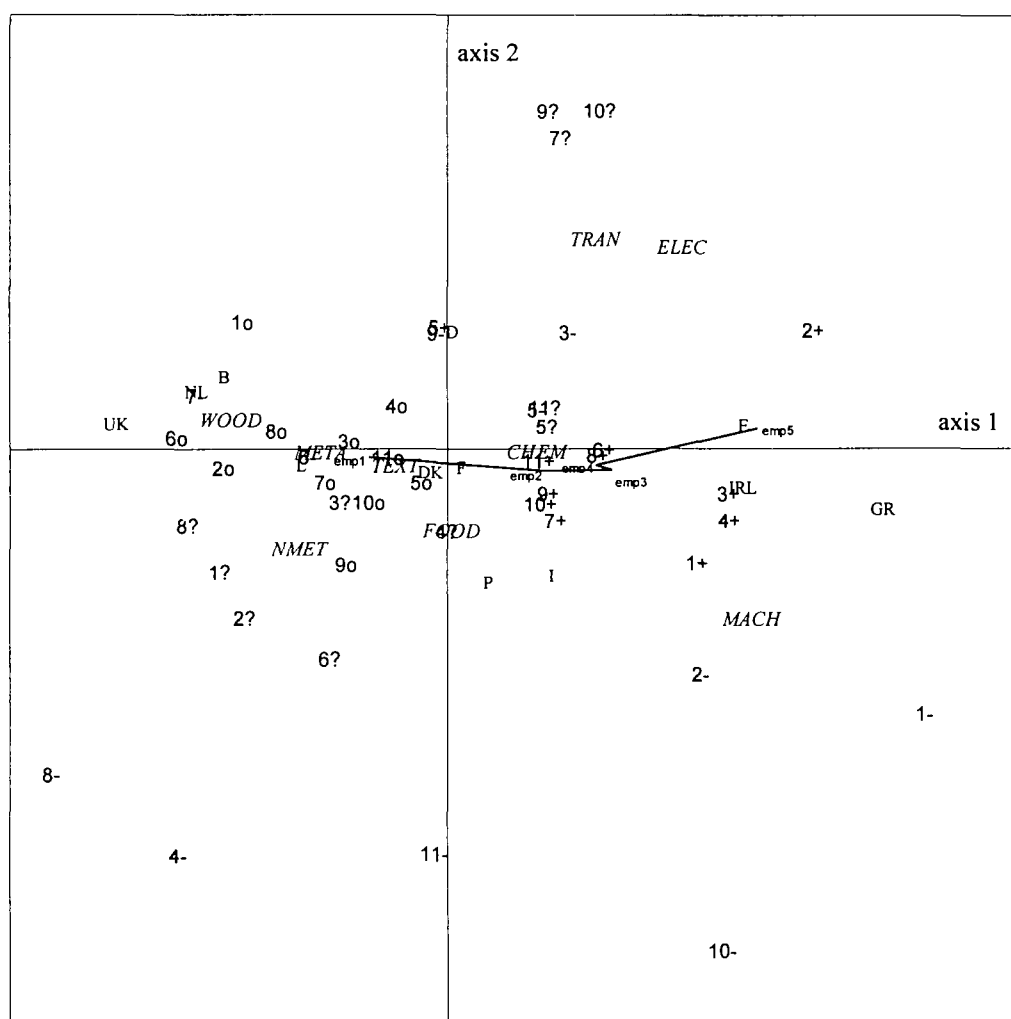
This overall group contained 11 questions relating to the measures to implement the single market. Companies were invited to state whether each of these measures had a positive impact (+), no impact (o) or a negative impact (-), or whether they had no opinion (?) on this.

The first axis, representing 42.5% of the inertia in the swarm, marks off the no-opinion and no-impact replies from the expressed opinions, mainly for the questions about the harmonization and the mutual recognition of technical regulations, the elimination of customs documentation and delays at frontiers.

This axis can be called the technology axis, as it separates the low-tech industries – manufacture of wood, paper and printing/publishing (WOOD), manufacture of metals and metal products (META), manufacture of non-metallic mineral products (NMET), and manufacture of textiles, leather and furniture (TEXT) – from the high-tech industries – manufacture of chemicals, rubber and plastics (CHEM), manufacture of transport equipment (TRAN), manufacture of electrical and optical machinery (ELEC), and manufacture of machinery and equipment (MACH).

The second axis, which also features quite prominently (16% of the information), primarily reflects the no-opinion replies to the impact of the liberalization of capital movements (point 10? on the graph), the change in VAT procedures (9?) and the deregulation of freight transport (7?). The other side of the axis is based to a lesser degree on the negative impact.

It clearly separates two sub-sets: manufacture of transport equipment (TRAN) and manufacture of electrical and optical machinery (ELEC) with the machinery and equipment industry (MACH).

Figure 6.4. Impact on firm's activities axes 1&2

Answers: + positive impact, o no impact, - negative impact, ? don't know

Questions: 1 harmonization of technical standards, 2 mutual recognition of technical standards, 3 conformity assessment procedures, 4 simplified patenting procedures, 5 opening up of public procurement, 6 elimination of customs documentation, 7 deregulation of freight transport, 8 elimination of delays at frontiers, 9 change in VAT procedures, 10 liberalization of capital movements, 11 double-taxation agreements.

emp1: 20-49, emp2: 50-199, emp3: 200-499, emp4: 500-999, emp5: 1,000 or more employees.

The disposition of points representing sectors and replies to the questions confirms that the high-tech industries have been most affected by the single market, be it in a positive or a negative way. By contrast, the low-tech industries tend towards 'no impact' replies or with no opinion indicating indifference.

The machinery and equipment industry (MACH) is deriving the most benefit from the introduction of the single market. Positive replies were given to almost all the questions. It differs from the transport and electricity sectors which have replied no-opinion to questions (7,9,10) by considering a relative negative impact for some questions.

On the other side, the companies in the manufacture of wood, paper and printing/publishing (WOOD) feel less affected than other sectors.

The companies in the non-metallic mineral products manufacturing sector (NMET) appear to be the least informed about the consequences of the single market.

The food, beverages and tobacco industry (FOOD) is most representative of European industry as a whole. It is close to the centre of gravity on almost all the axes.

We projected company size onto this structure as a supplementary element. The five size categories (emp1 to emp5) develop almost linearly along the first axis. Given that this axis separates the indifferent and uninformed companies from those with clear-cut opinions (positive or negative), it follows that the small companies are the least concerned by the introduction of the single market, while large enterprises appear to be the best informed and most likely to report a positive impact on their activities.

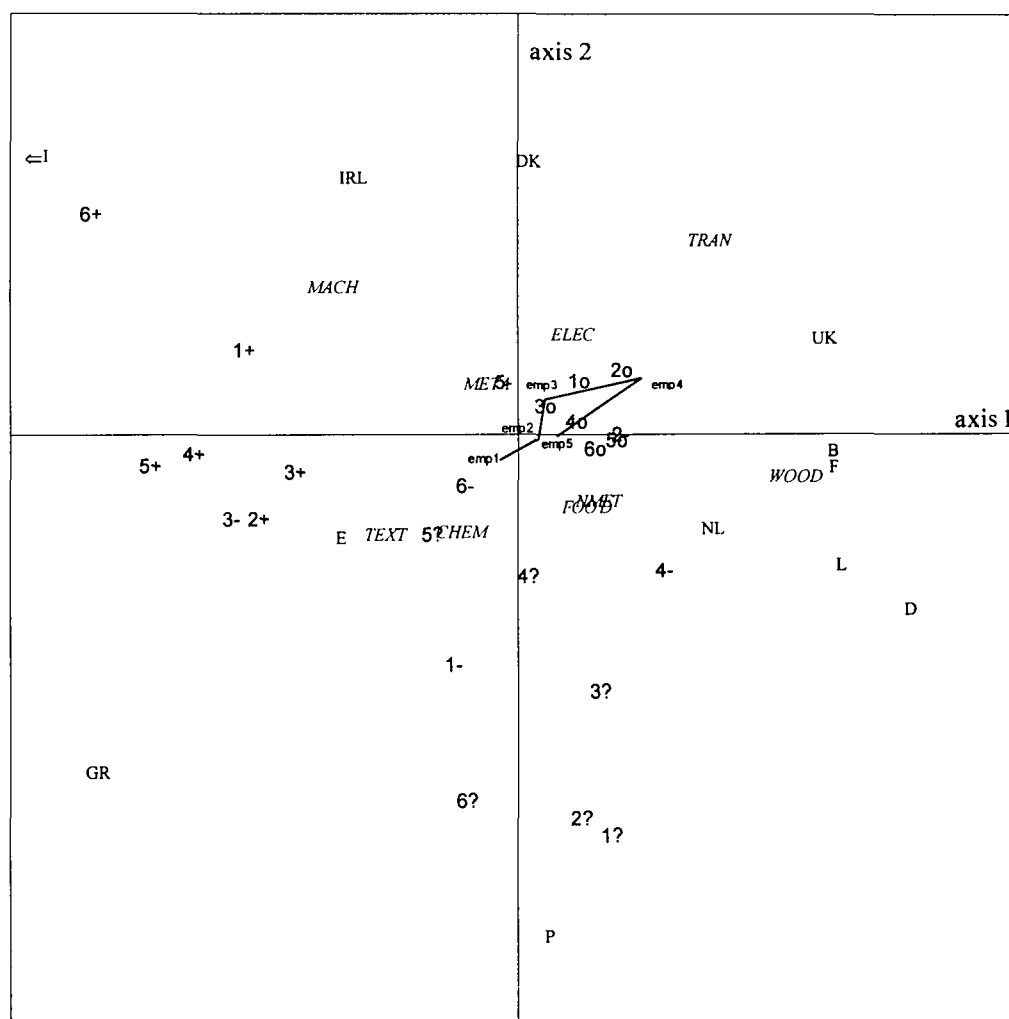
For this set of questions, the projection of countries onto this diagram, as supplementary elements, shows that it is primarily Greek, Spanish and Irish companies that regard the consequences of the SM as being positive for their activities, with Italian and Portuguese companies coming second here. The British and the Dutch, in contrast, are the most indifferent, while French, German and Danish are closest to the average position.

6.4.2. Impact of measures on companies' operations

The question posed was as follows: for each of the following aspects of your company's operations, please state whether the single market programme has had a positive or a negative impact (directly or indirectly). The four possible replies are: positive impact (+), no impact (o), negative impact (-), don't know (?).

The first axis, representing 44% of the information, separates the positive-impact replies from the no-impact ones. The impact on sales outside the European Union is ambiguous, with positive impact and negative impact on the same side.

The second axis, explaining 20% of the information, is dragged down mainly by the don't-know responses.

Figure 6.5. Impact on firm's operations axes 1&2

Answers: + positive impact, o no impact, - negative impact, ? don't know

Questions: 1 sales to the domestic market, 2 sales to other EU countries, 3 sales to non-EU countries, 4 productivity, 5 profitability, 6 employment.

emp1: 20-49, emp2: 50-199, emp3: 200-499, emp4: 500-999, emp5: 1,000 or more employees.

The positions of sectors and replies on the graphs show the following characteristics.

The machinery and equipment (MACH) and textiles, leather and furniture (TEXT) industries take the most positive view of the impact of the single market on their firm's operations.

Featured on the opposite side are two sectors, the manufacture of electrical and optical machinery (ELEC) and the transport equipment (TRAN) industry, whose operations have remained least affected by the introduction of the single market. They gave the reply 'no impact' to almost all the questions in this block.

The companies in the manufacture of wood, paper and printing/publishing (WOOD) sector stand out here because they have no opinion chiefly in relation to the first three questions (domestic, foreign and non-EU sales).

The projection of the company-size element does not produce any size effect, with the largest companies (emp5) reacting the same way as the smallest (emp1).

The countries projection reveals a positive impact on companies' operations for Italy and Ireland, particularly in terms of employment, and a positive impact for Greece and Spain on the intra-EU sales front. Denmark and Portugal are on opposite sides along the second axis, with Denmark feeling positive effects on employment and Portugal experiencing the opposite, and a negative impact on domestic sales.

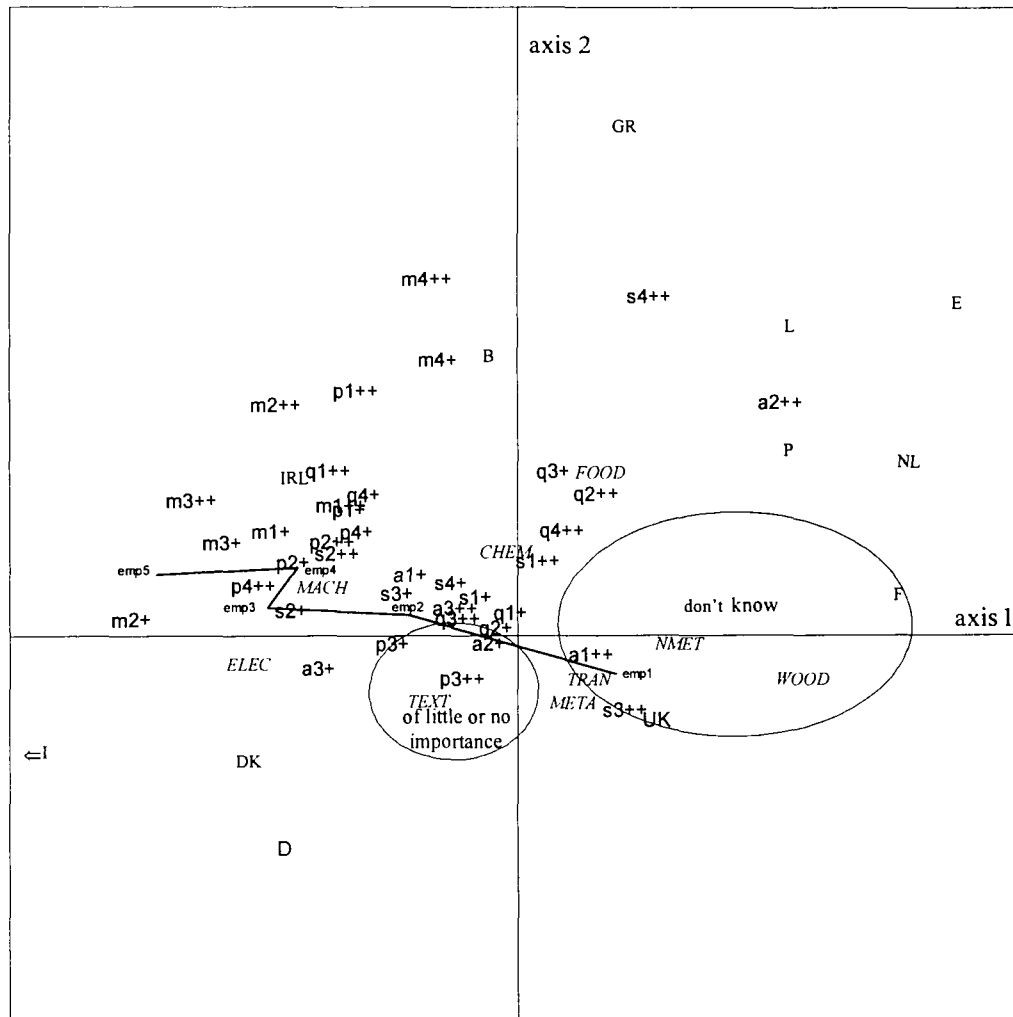
6.4.3. Strategic importance

Here, firms were asked to indicate the importance of the single market programme for the development of corporate strategy over the past few years in the domains of products (p), production (q), marketing and distribution (m), sourcing (s), acquisition and co-operation (a).

The first axis, explaining 57% of the information, marks off the no-opinion replies on the right-hand side from the average opinions on the left.

The second axis represents 13% of the inertia. It shows the order of importance attached to the questions, ranging from 'of little or no importance' at the bottom to 'very important' at the top of the chart.

Figure 6.6. Strategic importance axes 1&2



Answers: ++ very important, + quite important for company's strategy

Questions: **product**, p1 standardization, p2 specialization, p3 pricing, p4 research and development;

production, q1 capacity of existing domestic plants, q2 number of domestic plants, q3 establishment of plants in other EU countries, q4 lean production methods;

marketing & distribution, m1 penetration of markets in other EU countries, m2 advertising in other EU countries, m3 distribution networks in other EU countries, m4 pan-European labelling and packaging;

sourcing, purchase from other EU countries, s1 of raw material, s2 of components, s3 of business services, s4 of financial services;

acquisition, co-operation, ownership, a1 investment in other companies, a2 investment from other companies, a3 co-operation agreements with other companies.

emp1: 20-49, emp2: 50-199, emp3: 200-499, emp4: 500-999, emp5: 1,000 or more employees.

The analysis of the graph shows the following characteristics.

The 'very important' replies are scattered on the graph and cannot be analysed as a whole.

The 'very important' replies chiefly for the harmonization of European labelling and packaging (m4++) come from manufacture of food, beverages and tobacco (FOOD) and chemicals, rubber and plastics (CHEM).

The manufacture of machinery and equipment (MACH) sets itself apart in attaching major importance to product standardization (p1++, p1+), research and development (p4++, p4+) and to increasing existing domestic production capacities (q1++).

Many companies in manufacture of wood, paper and printing/publishing sector (WOOD) and the non-metallic mineral products manufacturing sector (NMET) reported having no opinion.

Bottom right, the manufacture of metals and metal products (META) and the transport manufacturing (TRAN) sectors are located between the 'no opinion' and the 'of little or no importance' replies.

The textiles, leather and furniture (TEXT) industry and the manufacture of electrical and optical machinery (ELEC) sectors tended to reply 'of little or no importance' to all the questions. However, the electrical and optical machinery industry, in particular, stands out in the marketing area, with a relatively large proportion of these enterprises considering that market penetration, advertising and distribution networks are quite important.

Projecting the element of company size reveals a major size factor. Small companies are less inclined to develop corporate strategies and the largest stand out as those attaching most importance to strategic planning.

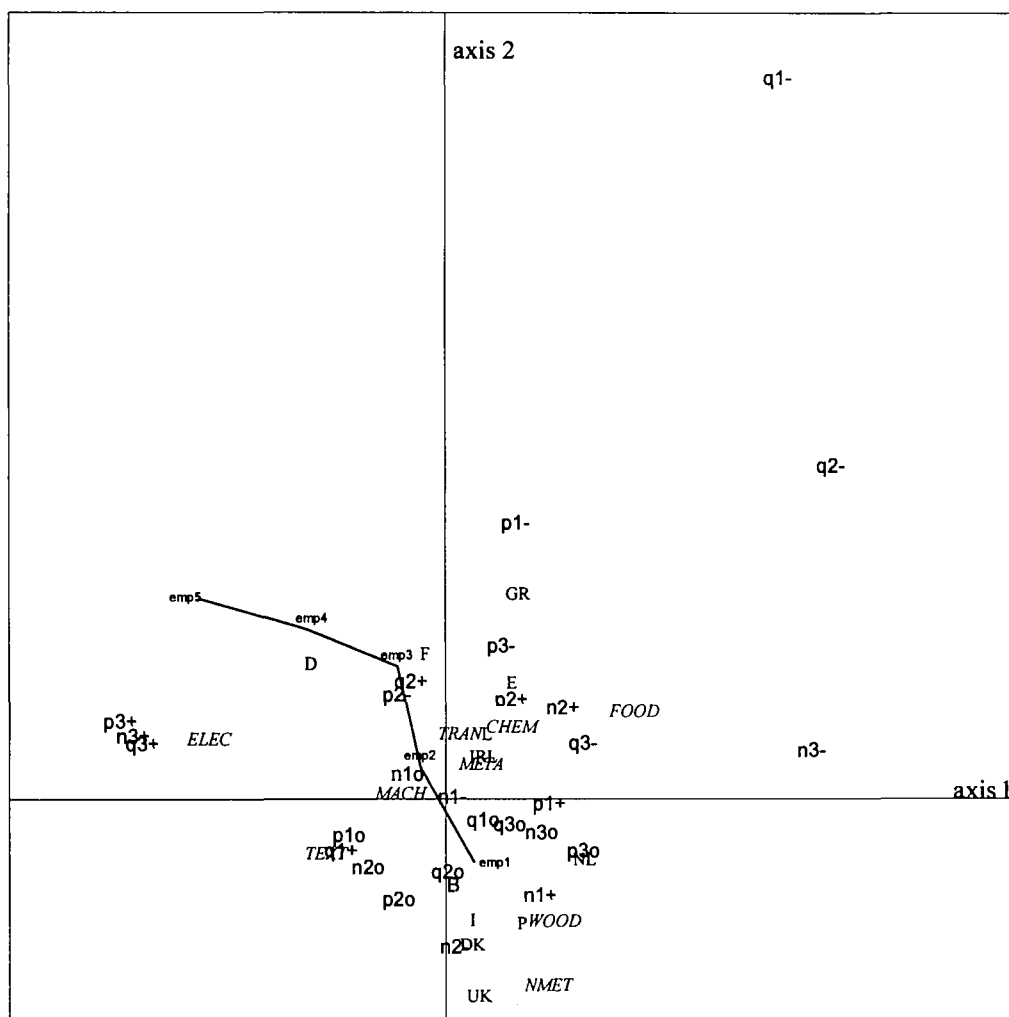
The countries projection shows that Italy, Denmark and Germany express qualified opinions on the importance of strategic planning and tend towards average replies ('of little or no importance' or 'quite important'). United Kingdom companies are inclined to have no opinion or to attach little or no importance to strategy. Ireland places importance on strategy and qualifies its assessment by predominantly replying 'quite important' and 'very important'. Belgium and Greece stand out on the 'very important' side. Luxembourg, Spain, Portugal and the Netherlands either consider strategy to be very important or have no opinion. France, finally, is the country with least to say on this subject.

6.4.4. Competition

The question was to indicate any change in competition levels on the domestic market which firms had noticed in recent years from domestic (1), other EU (2) or non-EU (3) firms, on the basis of the number of competitors (n), price (p), product quality/choice (q). The replies are increase (+), no change (o) and decrease (-).

The first axis represents 45% of the inertia. On the left-hand side, it primarily reflects the increase in competition with companies outside the European Union, while on the right it is based to a lesser degree on the absence of change in competition outside the EU and the decrease in competition based on quality and choice.

The second axis explains 19% of the inertia and bears witness to significant changes, particularly the increase in competition with European enterprises and the relative decrease in competition with domestic companies in terms of price, quality and choice.

Figure 6.7. Changes in competition levels axes 1&2

Answers: + increase, o no change, - decrease.

Questions: n number of competitors, p price, q quality/choice; 1 domestically owned firms, 2 other EU owned firms, 3 non-EU-owned firms.

emp1: 20-49, emp2: 50-199, emp3: 200-499, emp4: 500-999, emp5: 1,000 or more employees.

It is, therefore, mainly the manufacture of electrical and optical machinery (ELEC) that has experienced a rise in competition with companies outside the European Union. Competition has also increased for the textiles, leather and furniture industry (TEXT), but to a lesser degree.

By contrast, this competition has increased to a relatively small extent for the industry of food, beverages and tobacco (FOOD), in which some companies see a decrease in quality- and choice-based competition.

The manufacture of wood, paper and printing/publishing sector (WOOD) and the non-metallic products manufacturing sector (NMET) stand out for having experienced no change in competition with non-national companies.

Along the third axis (15%), the transport equipment manufacturing industry (TRAN), which reports an increase in quality- and choice-based competition, contrasts with the metals and metal products industry (META), which has been affected more by a drop in competition with companies outside the European Union.

The size effect is certainly noticeable: the larger the company, the more competition has increased – chiefly with European companies and followed by companies outside the European Union.

The projection of countries onto the chart shows that Germany and France have experienced an increase in competition with companies both inside and outside the Union. These two countries, as well as Greece and Spain, and to a lesser extent Luxembourg and Ireland, show a relative fall in competition based on price, quality and choice with national companies.

The United Kingdom, Denmark, Portugal, Italy, Belgium and the Netherlands have experienced relatively little change in competition with European and domestic companies.

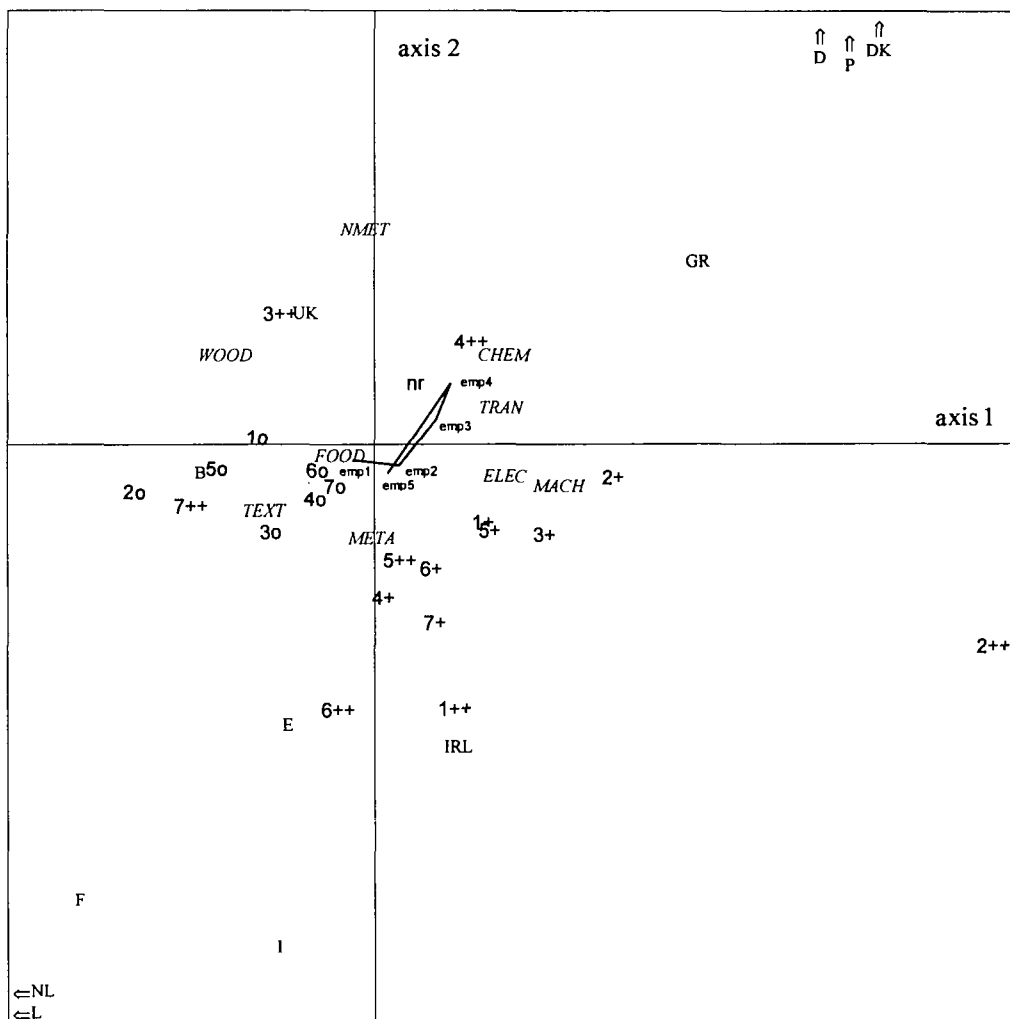
6.5. Costs

Here, companies were asked to quantify the importance of certain costs in the context of the replies given to the preceding question in the questionnaire as to whether the single market programme had caused costs to rise or fall. The possible replies to this group of questions were: very important, quite important, of little or no importance, non-response. This latter possibility could also be applied to the group of questions as a whole and was taken up by those companies which have felt no effect on costs.

Since the inertia is less concentrated on the first two axes (38% and 20%) than in the other analyses, the third (16%) and fourth (13%) axes must also be taken into account in the analysis.

The first axis separates the chemicals, rubber and plastics (CHEM), electrical and optical machinery (ELEC) and machinery and equipment (MACH) industries from the textiles, leather and furniture (TEXT) and wood, paper and printing/publishing (WOOD) sectors. Chiefly marked off from one another here are, on the right, the 'very important' and, on the left, the 'of little or no importance' replies to the question as to the importance of testing and type approval costs. Also to be found on the left are the 'of little or no importance' replies to the questions on the importance of production process, distribution and raw materials costs.

The second axis separates the manufacture of chemicals, rubber and plastics (CHEM), non-metallic mineral products manufacturing (NMET) and wood, paper and printing/publishing industries (WOOD) from the manufacture of metals and metal products (META) and textiles, leather and furniture (TEXT) sectors. It sets out the order of importance attached to the questions. This ranges from 'very important' on the left to 'no reply' on the right, except for distribution and marketing costs.

Figure 6.8. Importance of costs axes 1&2

Answers: ++ very important, + quite important, o of little or no importance, nr non-response.

Questions: 1 production process, 2 testing and certification, 3 distribution costs, 4 marketing costs, 5 costs of raw materials, 6 banking costs, 7 insurance costs.

emp1: 20-49, emp2: 50-199, emp3: 200-499, emp4: 500-999, emp5: 1,000 or more employees.

The representation of industry and replies to the questions onto the graph indicates mainly the following.

The textiles, leather and furniture industry (TEXT) stands out through a large proportion of replies of 'of little or no importance' to all the questions and in particular to those relating to testing and certification costs.

The manufacture of metals and metal products (META) attaches great importance to production process costs (1++), banking costs (6++) and insurance costs (7++).

The companies in the manufacture of electrical and optical machinery (ELEC) and the manufacture of machinery and equipment (MACH) have similar opinions and regard testing and certification costs as being very important (2++, 2+). They attach relative importance to distribution costs (3+).

The chemicals, rubber and plastics industry (CHEM) attaches importance to testing and certification costs (2++, 2+) and to distribution costs (3++, 3+).

The non-metallic mineral products manufacturing sector (NMET) is characterized by the large number of 'non-responses' and the major importance attached by a proportion of companies to distribution costs (3++).

The manufacture of wood, paper and printing/publishing sector (WOOD) does not express a clear-cut opinion on costs.

The axes studied do not appear to exhibit any size effect.

The countries projection reveals that Denmark, Portugal and Germany returned a large number of 'non-responses', followed by Greece. Luxembourg and the Netherlands, followed by France, present numerous 'of little or no importance' replies. Ireland, Italy and Spain have a relatively low proportion of 'non-responses' and 'of little or no importance' replies, which shows the importance attached to costs in general. The United Kingdom and Belgium occupy an average position.

6.6. Legislation

Here, firms were asked to indicate whether they agreed or disagreed with seven statements (see graph) regarding single market legislation as it affected their own firm or sector.

Ireland did not reply to two questions in this group concerning legislation. In order to obtain a complete analysis of all the questions, Ireland's replies have been eliminated from this analysis.

The first axis represents 52% of the inertia. It clearly marks off (on the left) companies which regard the legislative measures as having been a success from companies expressing no opinion (on the right).

The second axis, which explains 20% of the information, separates those companies in favour of new measures (top) from those not desiring any new measures (bottom).

The manufacture of wood, paper and printing/publishing sector (WOOD) and the manufacture of metals and metal products sector (META) feel less concerned than other sectors.

The textiles, leather and furniture (TEXT) and food, beverages and tobacco (FOOD) manufacturers are the ones most strongly holding the view that the single market has been a failure at both the corporate and the sectoral levels in their particular country. Nevertheless, some of these companies think that the elimination of barriers to trade in the European Union has been a success. Moreover, these industries, and particularly the food, beverages and tobacco sectors, would prefer new measures rather than see nothing being undertaken.

The size factor is significant along the first axis. The bigger the enterprise, the more positive the opinions it expresses.

The projection of countries shows that the Netherlands, Belgium, the United Kingdom and Portugal are the most indifferent. Spain takes a positive view as regards the success of the SM at the sectoral level in the Union, the elimination of barriers to trade in the EU and the creation of a genuine single market.

Italy is the country most strongly of the opinion that the single market has been a success, and it would like new measures to be taken.

Germany stands out from the average in that there is a low level of support for new measures.

7. Description of the survey

The current survey was conducted by Member States, either National Statistical Institutes or other bodies (both public and private), specialized in statistics and economic analysis, and coordinated by Eurostat. The National Statistical Institutes of the following countries co-operated with Eurostat: Belgium, Denmark, Greece, Ireland, Italy, France, Luxembourg, the Netherlands, Portugal and the United Kingdom. The organizations involved were: IFO Institute (Germany), ESRI (Ireland), CEPS (Luxembourg), NEI (The Netherlands), Ministry of Industry and Energy (Spain).

The questionnaire was defined by a working group composed of delegates from the Member States, together with staff from Eurostat and DG XV (the directorate-general of the Commission in charge of the evaluation of the single market programme).

Scope of the survey: The survey covers most manufacturing activities, construction and services for enterprises with a size greater than or equal to a minimum. The minimum was fixed at 20 employees for the Manufacturing sector and 5 employees for the Services sector. The statistical unit chosen was the enterprise (as defined by Council Regulation (EEC) No 696/93), particularly because the questionnaire asks questions concerning strategy and competition policy, decisions that are generally taken at the enterprise level.

The economic (or activity) sectors covered are defined according to NACE Rev.1 (Council Regulation (EEC) No 3037/90).⁴ For Manufacturing, all activities corresponding to section D of Nace Rev.1 have been covered. Other economic sectors such as Mining and Quarrying (Section C) and Production of Electricity, Gas and Water Supply (Section E) have been excluded for the purposes of the survey. The Construction sector (Section F) is included. For the Services sectors, Distributive Trade, Hotels and Restaurants, Transport, Storage and Communication, Financial Intermediation, Real Estate Renting and Business Activities are included, which correspond respectively to Sections G, H, I, J and K of NACE Rev.1.

The sample includes no enterprise from Greece for the Construction sector, and no enterprise from Germany for Services other than Distributive Trade.

The opinion survey was carried out mainly in the first half of 1995. A stratified sample was drawn randomly by each national partner (usually the National Statistical Institute) according to agreed specifications. The purpose was to achieve representativity at both the European and national levels. This representativity means that the sample reflects the structure of the population as far as the sector of activity, size class and nationality of the enterprises are concerned. Additional information regarding representativity and precision of the estimates derived from the sample is given in Chapter 8. The stratification is based on a single scheme: for each country, the strata are defined by the intersection of a sector of activity and a size class. The sector breakdown corresponds to subsections of NACE Rev.1: Food, Beverages and Tobacco (DA), Textiles, Leather and Furniture (DB+DC+DN), Wood, Paper and Printing/Publishing (DD+DE), Chemicals, Rubber and Plastics (DG+DH), Non-metallic Mineral Products (DI), Metals and Metal Products (DJ), Machinery and Equipment (DK), Electrical and Optical Machinery (DL), Transport Equipment (DM), Construction (F),

⁴ Council Regulation (EEC) No 3037/90 of 9 October 1990 on the statistical classification of economic activities in the European Community (OJ L 293, 24.10.1990, p. 1).

Wholesaling and Motor Trade (G div. 50 and 51), Retail Trade (G div. 52), Hotels and Restaurants (H), Transports and Communications (I), Financial Intermediation (J), Property and Business Activities (K). The size classes are defined according to employment: 5 to 19 (services only), 20 to 49, 50 to 99, 100 to 249, 250 to 499, 500 to 1,999, 2,000 and more.

The survey was a postal survey in most countries, with several reminders by post or phone to reach a satisfactory response rate.

About 13,500 (56% response rate, see Table 7.1) out of the original 24,000 sample selected for the survey returned their completed questionnaires. Two reasons may explain this level of response rate. Firstly, the original sample may have been drawn from an old version of the frame in some cases, since an additional requirement for the sample was that we should also get the history of these enterprises from 1987 to 1993 for some basic characteristics (employment, turnover, value added). This may have increased, in some countries, the number of enterprises having ceased activity at the date of inquiry. Secondly, the survey was generally not compulsory, which reduces in general the response rate to surveys. However, according to generally agreed norms, the observed response rate can be considered quite good for an opinion survey. A secondary small survey to non-respondents was conducted to ascertain the reasons for non-response (see Chapter 8).

Individual data have been transmitted to Eurostat for harmonized processing of the results. This transmission has been done under the provisions of the EU regulation on confidentiality (Council Regulation (EEC) No 1588/90).⁵

Contents: The questionnaire addresses a great number of topics in the management of a firm: administrative procedures, competition policy, analysis of costs, strategy, production, sourcing. These are generally not all in the scope of activity of a single person in a company. An optimum answer to the questionnaire may have required the cooperation of several members of staff.

7.1. Questionnaire and data collection

The questionnaires used by Member States were translated in some cases from the English original, and additionally some Member States modified the questionnaire slightly. The only modifications we are aware of are:

- (a) in certain cases some Member States added a new modality 'don't know' when this was not included in the model questionnaire;
- (b) a few open questions were suppressed by some Member States.

Two types of questionnaire were developed: one for Manufacturing and one for Services. Since some Member States used the questionnaire intended for Services for the Construction sector, the information obtained for this sector is restricted to questions common to both questionnaires.

The questionnaires were accompanied by a covering letter explaining the purpose of the survey and basic concepts relating to the single market to aid questionnaire completion.

⁵ Council Regulation (Euratom, EEC) No 1588/90 of 11 June 1990 on the transmission of data subject to statistical confidentiality to the Statistical Office of the European Communities (OJ L 151, 15.6.1990, p. 1).

Model covering letter to participants in the survey

Dear (General Manager)

In 1985 the Commission of the European Communities published a White Paper outlining a programme of over 280 legal measures which were identified as necessary for the creation of the European single market. These measures, over 95% of which have now been adopted, were designed to ensure the free movement of goods, services, labour and capital throughout the European Union, with effect from 1 January 1993. A short list of the areas affected by these measures is attached.

The first comprehensive study of the effectiveness and economic impact of the measures adopted to create the single market is now underway. An essential element of this assessment is a survey of business reactions to identify the strengths and weaknesses of the single market programme and to obtain a quantitative evaluation of its impact. Your company has been chosen, on the basis of a random sample, to participate in this survey.

You will appreciate that as the results of the study on the impact of the single market programme will influence the formulation of future policy, a high response rate, ensuring the statistical validity of the results, is necessary. I would therefore ask you to complete and return the enclosed questionnaire to the address indicated. In answering the questions you should base your answers on single market effects only, ignoring other policy measures and developments which may have occurred at the same time.

If you wish to receive a copy of the results of this survey, please tick the box at the end of the questionnaire.

May I thank you in advance for your cooperation.

Yours etc.

Explanatory note attached to the questionnaire:

MEASURES DESIGNED TO ACHIEVE THE SINGLE MARKET

1. **FREE MOVEMENT OF PERSONS** Right of residence, mutual recognition of professional qualifications.
2. **FREE MOVEMENT OF GOODS**
Technical harmonization and standards for agricultural products, food legislation, mechanical and electronic engineering, pressure vessels, medical appliances and metrology, construction and construction products, motor vehicles, agricultural and forestry tractors, pharmaceuticals, chemical products, toys, textiles, cosmetics, terminal equipment, energy consumption.
Special free movement arrangements for weapons, cultural goods, explosives, drugs and precursors.
3. **FREE MOVEMENT OF SERVICES AND FREEDOM OF ESTABLISHMENT**
Financial services including banks, insurance, stock exchanges and securities.
Transport – road, rail and air; competition rules, government intervention, transport infrastructure, transport prices and terms, market access and capacity control, technical harmonization and safety.
Telecommunications services.
Audio-visual services.
4. **FREE MOVEMENT OF CAPITAL**
The liberalization of capital movements between Community residents.
5. **PUBLIC PROCUREMENT**
Provides all Community firms with the opportunity to tender for public projects covering public works, supply and service contracts.
6. **ENERGY**
Directives have been adopted on the transit of electricity, gas and price transparency.
7. **INTELLECTUAL AND INDUSTRIAL PROPERTY**
Community trade mark, harmonization of copyright and neighbouring rights.
8. **COMPANY LAW**
Annual and consolidated accounts, mergers, auditing.
9. **DIRECT AND INDIRECT TAXATION**
Common system of VAT, excise duties, mutual assistance in tax matters, company taxation.
10. **SAFETY AND PROTECTION OF THE ECONOMIC INTERESTS OF CONSUMERS**
Directives on misleading advertising, liability for defective products, consumer credit, protection of health and safety of consumers.

Questionnaire addressed to manufacturing firms

Q 1. Please indicate the number of persons employed in your company (to be completed by research institute, if possible).

<50 <input type="checkbox"/>	50-199 <input type="checkbox"/>	200-499 <input type="checkbox"/>	500-999 <input type="checkbox"/>	>1,000 <input type="checkbox"/>
NACE (2-letter) (to be completed by research institute)		<input type="checkbox"/> <input type="checkbox"/>		
NUTS (level 2) (to be completed by research institute)		<input type="checkbox"/> <input type="checkbox"/>		
Does your firm form part of a group of companies?		Yes <input type="checkbox"/>	No <input type="checkbox"/>	

Q 2.1 Please state whether the following single market measures have had an impact on your firm's activities.

	Positive impact	No impact	Negative impact	Don't know
Harmonization of technical regulations and/or standards	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mutual recognition of technical regulations and standards	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Conformity assessment procedures	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Simplified patenting procedures	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The opening-up of public procurement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The elimination of customs documentation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Deregulation of freight transport	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The elimination of delays at frontiers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The change in VAT procedures for intra-EU sales	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The liberalization of capital movements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Double-taxation agreements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q 2.2 For each of the following aspects of your firm's operations please indicate whether the single market programme has had a positive or negative impact (either directly or indirectly).

	Positive impact	No impact	Negative impact	Don't know
Sales in your country	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sales in other EU countries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sales to non-EU countries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Productivity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Profitability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employment ¹	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

¹ If employment has increased, indicate positive impact; if employment has decreased, indicate negative impact.

Q 2.3

Please indicate, for each of the following possible areas, the importance of the single market programme to the development of your company's strategy in recent years.

Strategy		Very important	Quite important	Of little or no importance	Don't know/ Not applicable
Product	Product standardization	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Product specialization	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Pricing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Research and development of new products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Production	Capacity of existing domestic production plants	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Number of domestic production plants	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Establishment of production plants in other EU countries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Lean production methods	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Marketing & distribution	Penetration of markets in other EU countries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Advertising in other EU countries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Distribution networks in other EU countries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Pan-European labelling and packaging	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sourcing	Purchase of raw materials from other EU countries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Purchase of components from other EU countries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Purchase of business services from other EU countries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Purchase of financial services from other EU countries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Acquisition Co-operation Ownership	Investment in other companies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Investment from other companies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Co-operation agreements with other companies (Please specify)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
				

Q 2.4 Please indicate any change in competition levels on the domestic market which you have noticed in recent years from domestic, other EU or non-EU firms.²

	Increase	No change	Decrease
(i) from an increase in the <u>number</u> of competitors			
- domestically owned firms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- other EU-owned firms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- non-EU-owned firms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(ii) competition <u>on the basis of price</u>			
- domestically owned firms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- other EU-owned firms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- non-EU-owned firms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(iii) competition <u>on the basis of product quality/choice</u>			
- domestically owned firms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- other EU-owned firms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- non-EU-owned firms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q 3.1 To what extent, in your opinion, has the implementation of the single market programme affected the unit costs of your company's typical or average product?

Don't know ☐

Reduction >10% (Specify)	Reduction 6<10%	Reduction 2<6%	Reduction 0<2%	No change	Increase 0<2%	Increase 2<6%	Increase 6<10%	Increase >10% (Specify)
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

² The distinction is based on ownership rather than location.

Q 3.2 **Regarding the cost reduction/increase indicated above how important have the following been in bringing it about?**

	Very important	Quite important	Of little or no importance
Production process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Testing and certification	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Distribution costs (including transport)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Marketing costs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Costs of raw materials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Banking costs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Insurance costs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other, please specify	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q 4. **Please indicate whether you agree or disagree with the following statements regarding single market legislation as it affects your own firm or sector.**

	Agree	No opinion	Disagree
The single market programme has been a success for your firm	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The single market programme has been a success for your sector in your country	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The single market programme has been a success for your sector in the EU	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The single market programme has been successful in eliminating obstacles to EU trade in your sector	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The single market programme has been successful in creating a genuine single market in your sector	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Additional measures are needed to eliminate obstacles to EU trade If you agree, please specify your first priority	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Additional measures are needed in this sector to create a genuine single market If you agree, please specify your first priority	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Questionnaire addressed to services firms

Q 1. Please indicate the number of persons employed in your company (to be completed by research institute, if possible).

<50 ☐50-199 ☐200-499 ☐500-999 ☐>1,000 ☐NACE³ (2-digit) (to be completed by research institute) ☐☐NUTS⁴ (level 2) (to be completed by research institute) ☐☐Does your firm form part of a group of companies? Yes ☐ No ☐

Q 2.1 Please state whether the following single market measures have had a positive or negative impact on your firm.

	Positive impact	No impact	Negative impact	Don't know
Harmonization of licensing/authorization requirements in the EU	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Recognition of licences/authorizations in other EU states	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Measures to facilitate cross-border operations into other EU states	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Measures to facilitate physical establishment in other EU states	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The opening-up of public procurement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The liberalization of capital movements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Double-taxation agreements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q 2.2 For each of the following aspects of your company's operations please indicate whether the single market programme has had a positive or negative impact (either directly or indirectly).

	Positive impact	No impact	Negative impact	Don't know
Sales to the domestic market	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sales to other EU countries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sales to non-EU countries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Productivity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Profitability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employment ⁵	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

³ Nomenclature d'Activités de la CE, i.e. industrial sector.

⁴ Nomenclature of Units of Territory for Statistics, i.e. location by region.

⁵ If employment has increased, indicate positive impact; if employment has decreased, indicate negative impact.

Q 2.3 Please indicate, for each of the following possible areas, the importance of the single market programme to the development of your company's strategy in recent years.

Strategy		Very important	Quite important	Of little or no importance	Don't know/Not applicable
Products/ Services	More standardized products/services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	More specialized products/services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Pricing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Development of new products/services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Efficiency in the provision of products/services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Marketing & distribution	Increase in cross-border provision of services to other EU states	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Establishment of operations in other EU states	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Distribution networks in other EU countries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Advertising in other EU states	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sourcing	Purchase of business services from other EU countries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Purchase of financial services from other EU countries (not relevant for financial services firms)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Acquisition Co-operation Ownership	Direct investment in other companies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Direct investment from other companies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Co-operation agreements with other companies (Please specify)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
				

Q 2.4

Please indicate any change in competition levels on the domestic market which you have noticed in recent years from domestic, other EU or non-EU firms.⁶

	Increase	No change	Decrease
(i) from an increase in the <u>number</u> of competitors			
- domestic firms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- other EU firms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- non-EU firms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(ii) competition <u>on the basis of price</u>			
- domestic firms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- other EU firms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- non-EU firms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(iii) competition <u>on the basis of quality and choice of service</u>			
- domestic firms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- other EU firms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- non-EU firms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

⁶ The distinction is based on ownership rather than location.

Q 3. Please indicate whether you agree or disagree with the following statements regarding single market legislation as it affects your own firm or sector.

	Agree	No opinion	Disagree
The single market programme has been a success for your firm	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The single market programme has been a success for your sector in your country	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The single market programme has been a success for your sector in the EU	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The single market programme has been successful in eliminating obstacles to EU trade in your sector	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The single market programme has been successful in creating a genuine single market in your sector	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Additional measures are needed to eliminate obstacles to EU trade If you agree, please specify your first priority	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Additional measures are needed in this sector to create a genuine single market If you agree, please specify your first priority	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

7.2. Size of the sample and response rate

Table 7.1.a. Response rate by sector

CLASSIFICATION		STATISTICS		
STRATA Nace Rev. 1 (section)		Sample Size	Respondent	Response Rate
INDUSTRY				
DA	Food, beverages & tobacco	1358	773	56,9
DB+DC+DN	Textiles, leather & furniture	1960	1153	58,8
DD+DE	Wood, paper & printing/publishing	1458	826	56,7
DG+DH	Chemicals, rubber & plastics	1286	809	62,9
DI	Non-metallic mineral products	710	421	59,3
DJ	Metals & metal products	1554	873	56,2
DK	Machinery & equipment N.E.C.	1068	597	55,9
DL	Electrical & optical machinery	1197	690	57,6
DM	Transport equipment	582	385	66,2
	SUB-TOTAL INDUSTRY	11173	6527	58,4
CONSTRUCTION				
F	Construction	1679	802	47,8
	SUB-TOTAL CONSTRUCTION	1679	802	47,8
SERVICES				
DISTRIBUTIVE TRADE				
G1	Wholesale & motor vehicles	3683	2012	54,6
G2	Retail trade	1843	979	53,1
	SUB-TOTAL DISTRIBUTIVE TRADE	5526	2991	54,1
OTHER SERVICES				
H	Hotels & restaurants	813	448	55,1
I	Transport & communication	1696	893	52,7
J	Financial intermediation	1262	629	49,8
K	Property & business activities	1878	1094	58,3
	SUB-TOTAL OTHER SERVICES	5649	3064	54,2
	SUB-TOTAL SERVICES	11175	6055	54,2
	TOTAL ADHOC SURVEY	24027	13384	55,7

Source: Eurostat.

Table 7.1.b. Response rate by Member State

CLASSIFICATION		STATISTICS		
MEMBER STATES		Sample Size	Respondents	Response Rate
INDUSTRY				
B	Belgie/Belgique	594	386	65.0
DK	Danmark	467	306	65.5
D	BR Deutschland	3024	1268	41.9
GR	Elláda	474	411	86.7
E	España	1600	978	61.1
F	France	1533	957	62.4
IRL	Ireland	663	385	58.1
I	Italia	1009	669	66.3
L	Luxembourg	130	87	66.9
NL	Nederland	446	217	48.7
P	Portugal	316	228	72.2
UK	United Kingdom	917	635	69.2
SUB-TOTAL INDUSTRY		11173	6527	58.4
CONSTRUCTION				
B	Belgie/Belgique	127	25	19.7
DK	Danmark	116	74	63.8
D	BR Deutschland	503	238	47.3
E	España	401	150	37.4
F	France	177	94	53.1
IRL	Ireland	27	14	51.9
I	Italia	46	30	65.2
L	Luxembourg	33	33	100.0
NL	Nederland	94	48	51.1
P	Portugal	33	20	60.6
UK	United Kingdom	122	76	62.3
SUB-TOTAL INDUSTRY		1679	802	47.8
SERVICES				
DISTRIBUTIVE TRADE				
B	Belgie/Belgique	413	266	64.4
DK	Danmark	292	184	63.0
D	BR Deutschland	1848	804	43.5
GR	Elláda	175	147	84.0
E	España	624	327	52.4
F	France	337	183	54.3
IRL	Ireland	246	124	50.4
I	Italia	175	93	53.1
L	Luxembourg	57	54	94.7
NL	Nederland	309	147	47.6
P	Portugal	473	281	59.4
UK	United Kingdom	577	381	66.0
SUB-TOTAL DISTRIBUTIVE TRADE		5526	2991	54.1
OTHER SERVICES				
B	Belgie/Belgique	497	332	66.8
DK	Danmark	295	189	64.1
GR	Elláda	144	113	78.5
E	España	1020	505	49.5
F	France	1133	451	39.8
IRL	Ireland	273	145	53.1
I	Italia	652	345	52.9
L	Luxembourg	66	57	86.4
NL	Nederland	445	209	47.0
P	Portugal	259	160	61.8
UK	United Kingdom	865	558	64.5
SUB-TOTAL OTHER SERVICES		5649	3064	54.2
SUB-TOTAL SERVICES		11175	6055	54.2
TOTAL ADHOC SURVEY		24027	13384	55.7

Source: Eurostat.

8. Additional survey characteristics

8.1. Imputation of non-response and non-response survey

8.1.1. Partial imputation

Some item non-response analysis was included in raw files forwarded by the Member States. A hot-deck-based technique was used to impute these non-responses. The traditional hot-deck method was adapted to take into account the small size of the sample at the strata level (there are 1,344 strata for a total sample size of 13,500). We used an algorithm that keeps as much as possible the same distribution of answers before and after imputation of item non-response at the strata level. The average level of item non-response is given in the table below.

Table 8.1. Average percentage of item non-response

	Manufacturing	Construction	Services
All questions except 'contributions to cost variations' and the question regarding 'a genuine single market'	2%	4%	5%
Question about 'contributions to cost variation' (manufacturing only)	40%	n/a	n/a
'The single market has been successful in creating a genuine single market in your sector'	8%	6%	10%

Source: Eurostat.

Due to high item non-response for the questions regarding contributions to the cost variations (frame Q3.2 of the manufacturing questionnaire), a new modality 'don't know' was created to retain the information about non-response in the final results.

The higher non-response rate on the question relating to the 'creation of a genuine single market' underlines some difficulty businesses had to grasp the exact meaning of the concept of 'single market'.

8.1.2. Stratification

Since we received no information regarding the status of non-respondents (were the enterprises still active, or did they move or change activity, or did they merely refuse to answer?), we could not use the a priori probabilities to calculate the classical Horvitz-Thompson estimator and settled for an 'ex-post' approximation of the inclusion probabilities. We also ignored the consequences of misclassification. The reference information on which to weight the results was transmitted by our correspondents within the framework of our project (extracted from existing national structural statistics), or extracted at the EU level either from the database of the so-called SME project, or from statistics corresponding to Directive 72/221/EEC⁶ on structural statistics for the manufacturing sector. For a reference population in a stratum S of N(S) units, and a corresponding sample of n(S) units the 'weights' or inverses of the approximate sampling probabilities were simply taken to be equal to N(S)/n(S).

⁶ Council Directive 72/221/EEC of 6 June 1973 concerning coordinated annual surveys of industrial activity (OJ L 133, 10.6.1972, p. 57).

8.1.3. Complementary survey on non-respondents

Some Member States selected a sub-sample of non-respondents to which a special questionnaire was sent to identify the reasons for non-response. The results are as follows:

Non-response questionnaire

Businesses were asked to choose between the following reasons:

- *The questions asked are not relevant to your firm*
- *Information requested is confidential to your firm*
- *You do not have any opinion on the effects of the single market*
- *The single market programme has no effect on your firm*
- *Other reasons*

Table 8.2. Results of the survey on non-respondents

CLASSIFICATION		NON-RESPONSE CATEGORIES (in %)				
		Not relevant	Confidential information	No opinion	No effect	Other reasons
INDUSTRY and CONSTRUCTION	België/Belgique	29	5	10	32	24
	BR Deutschland	0	0	0	26	74
	Italia	0	8	12	16	64
	United Kingdom	14	3	6	9	68
	ALL	6	4	6	18	66
TRADE and SERVICES	België/Belgique	41	2	10	29	18
	BR Deutschland	0	0	0	25	75
	Italia	0	6	10	17	67
	United Kingdom	23	4	6	15	52
	ALL	11	3	5	20	61

Source: Eurostat.

8.1.4. Special investigation on the behaviour of non-respondents

The purpose was to test if the non-response behaviour of non-respondents was the same as the behaviour of the respondents, and, if not, the level of correction needed to correct response bias. The results, which are given below (see Table 8.3), show that there is no need for a special adjustment for the aggregated results, even if, as expected, the influence of global non-respondents is to reduce slightly the level of positive or negative opinions and symmetrically to increase the level of 'don't know' or 'no impact' opinions. However, since this investigation was limited to one question of the questionnaire (The single market programme has been a success for your enterprise: agree / no opinion / disagree), plus the influence of the sector of activity on this differential behaviour was overlooked, and additionally since the size of this complementary sample was small, it is not possible to establish reliable estimates of the correction factors at the stratum level. Estimates which would be necessary to correct precisely the figures at the aggregated level with a likely error smaller than the error is done by keeping the unadjusted figures.

The IFO Institute (Germany) went further and conducted a phone survey with a sample of about 120 non-respondents to collect reasons for non-response and the opinion of enterprises on a few selected questions. The basic idea was to differentiate between those who declare that they are non-respondents due to the irrelevancy of the survey, and those who declare having no time or another similar reason. Firstly, this complementary (phone) survey stated that those who belong to the first category (survey irrelevant) do not indicate any positive or negative opinion, and that those who belong to the second category (lack of time, other reason) had a pattern of opinion similar to the answers of respondents to the initial questionnaire. Secondly, using this result and the response rates by size class, a correction factor was calculated and applied to each stratum. Thirdly, the results were aggregated, and unadjusted and adjusted figures were compared.

The results are the following:

Table 8.3. Estimation of non-response bias

Size class of the enterprise	Results not adjusted for non-response bias		Correction factor	Results adjusted for non-response bias	
	Positive impact	Negative impact		Positive impact	Negative impact
20-49 empl.	13	20	0.7	9	13
50-199 empl.	18	13	0.8	14	10
200-499 empl.	23	12	0.9	22	11
500-999 empl.	36	9	1	36	9
1,000 or more empl.	50	6	1	50	6
All sizes	24	12	–	21	10

Source: IFO Institute, Germany.

Furthermore, it should be noted that the adjustment factor is even closer to 1 for results weighted not by the number of enterprises but by the employment or turnover of the enterprises (since it is closer to 1 for the highest size classes, which have a bigger influence for this type of weighted figures).

8.2. Different types of estimates

The tables in Chapters 3 and 4 give three types of estimates (dependent on sector):

- i- a percentage of firms expressing a given opinion,
- ii- a percentage of firms offering opinion expressed in number of employees,
- ii- a percentage of firms offering opinion expressed in terms of their turnover.

For **type i estimates**, we use an estimator that takes into account the known structure of the population of enterprises, that is the breakdown of this population along the three criteria: size class, sector of activity, country. This is the standard estimator associated to stratification.

$$\sum_i \text{Weight}(i) \bullet \text{Ind}(\text{opinion}(i)=\alpha)$$

$$P(\text{opinion}=\alpha) = \frac{\sum_i \text{Weight}(i) \bullet \text{Ind}(\text{opinion}(i)=\alpha)}{\sum_i \text{Weight}(i)}$$

$$\sum_i \text{Weight}(i)$$

where: Ind is a dummy variable such that Ind=1 if opinion(i)= α and 0 otherwise

Weight(i)=N/Ns with Ns (resp. N) equal to the number of enterprises in the stratum s of the sample including I (resp. the total sample).

Type ii estimator corresponds to the share of employment in the reference population of enterprises having expressed a given opinion, which is the weighted sum of the results observed in the sample, where the weighting factor is equal to the weight as indicated above times the average employment of the stratum including the corresponding enterprise.

$$\sum_i \text{Weight}(i) \bullet T(i) \bullet \text{Ind}(\text{opinion}(i)=\alpha)$$

$$P_T(\text{opinion}=\alpha) = \frac{\sum_i \text{Weight}(i) \bullet T(i) \bullet \text{Ind}(\text{opinion}(i)=\alpha)}{\sum_i \text{Weight}(i) \bullet T(i)}$$

$$\sum_i \text{Weight}(i) \bullet T(i)$$

where T(i) denotes the average employment of enterprises which belong to a given sector, size class stratum and geographical domain (country or EUR-12).

This average employment is available for all Member States in the manufacturing sector but can only be approximated at the EUR-12 level for the services sectors.

Type iii estimator only differs from type ii insofar as the characteristic T(i) - employment - is replaced by the characteristic E(i), average turnover of enterprises belonging to the stratum. Note that for the services sectors, these average turnover figures were not available for all countries, and therefore this estimator cannot be calculated.

8.3. Calculation of confidence intervals

To assess the importance of sampling errors on results, we calculated, using standard formulae for stratified sampling, the standard errors attached to a sub-set of results given in the chapters above. The figures given below correspond to the upper bound and lower bound of the confidence interval (at the so-called 95% level), i.e. they are respectively equal to the estimate plus (or minus) twice (actually 1.96) the value of the standard error of the estimate. This means that the (unknown) true value of the estimated proportion lies within this interval with a probability equal to 95%.

Example: If for a given proportion of enterprises having expressed a given opinion about a specific question the value given in the tables in Chapter 3 is **a**, and if the corresponding value for the standard error is α , then the (unknown) true value lies between **a-2 α** and **a+2 α** .

So, in the case of the proportion of enterprises of the manufacturing sector expressing that the measures of '*Harmonization of technical regulations and/or standards*' have had a positive

impact, for all EUR-12, the value for **a** in Table M.1 is **31%**. In Table 8.1.a the value for **a-2 α** and **a+2 α** are respectively **29%** and **34%**.

We can use these intervals to check if the differences between the estimated proportions of opinions of two sectors of activity are significant or not: if the confidence intervals of these estimators do not overlap, then the probability that they are different is about 95%.

An example for results broken down by Member State, size class or sector of activity and tables of results at EU level (two types of weightings) are given hereafter.

Table 8.1.a. Confidence interval example for manufacturing: single market's impact on your firm - harmonization of technical regulations and/or standards

Percentage of firms expressing opinion												
Classification	Lower bound of confidence interval				Estimated value				Upper bound of confidence interval			
	Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know
EUR-12	29.2	48.1	7.5	6.9	31.4	50.6	9.3	8.7	33.6	53.0	11.1	10.5
<i>By Member State</i>												
België/Belgique	10.7	57.9	0.0	9.2	15.9	65.0	3.9	15.1	21.2	72.1	9.0	21.0
Danmark	16.0	49.4	0.0	0.0	26.5	59.8	5.0	8.6	37.1	70.2	14.9	18.5
BR Deutschland	16.6	49.0	12.9	7.5	19.9	53.1	16.2	10.8	23.1	57.2	19.6	14.1
Elláda	42.8	29.2	0.0	10.1	48.5	34.6	1.9	15.0	54.2	40.0	6.0	20.0
España	36.1	41.9	4.8	4.2	40.1	46.0	7.2	6.8	44.0	50.2	9.5	9.3
France	27.6	42.4	9.1	7.9	31.3	46.4	11.7	10.6	35.0	50.5	14.3	13.2
Ireland	39.1	37.9	0.7	4.1	44.5	43.0	4.7	7.9	49.8	48.0	8.6	11.7
Italia	34.8	38.8	2.1	0.0	42.4	46.7	7.5	3.4	50.0	54.5	13.0	8.9
Luxembourg	9.0	56.7	7.1	0.0	16.7	64.4	14.5	4.5	24.4	72.0	21.8	11.8
Nederland	14.5	48.8	0.0	0.2	24.4	58.8	7.1	9.7	34.3	68.9	16.5	19.1
Portugal	26.0	30.8	0.0	6.2	37.1	43.9	2.1	17.0	48.1	56.9	12.9	27.8
United Kingdom	19.9	52.7	2.7	3.2	25.5	58.9	7.6	8.0	31.0	65.2	12.5	12.9
<i>By Manufacturing Sector</i>												
Food, beverages and tobacco	28.5	37.5	2.7	5.6	34.9	44.3	8.9	11.8	41.3	51.2	15.1	18.0
Textiles, leather and furniture	20.8	50.5	3.7	4.7	26.6	57.0	7.7	8.7	32.4	63.4	11.8	12.8
Wood, paper and printing/publishing	16.4	56.9	3.0	5.1	21.2	62.2	7.2	9.5	25.9	67.5	11.4	13.8
Chemicals, rubber and plastics	27.3	40.1	4.5	4.4	33.3	47.4	9.6	9.7	39.3	54.6	14.8	15.0
Non-metallic mineral products	21.0	39.5	0.0	4.4	30.2	49.8	6.8	13.3	39.3	60.0	15.6	22.1
Metals and metal products	25.7	47.4	3.0	4.8	31.4	53.4	6.7	8.6	37.1	59.4	10.3	12.3
Machinery and equipment N.E.C.	37.9	21.2	12.8	0.0	45.5	29.0	20.1	5.4	53.0	36.8	27.4	12.6
Electrical and optical machinery	30.3	42.1	5.0	2.3	36.2	48.3	9.3	6.3	42.1	54.4	13.5	10.3
Transport equipment	19.6	45.3	1.9	0.0	29.5	55.5	10.9	4.0	39.4	65.8	19.9	13.0
<i>By Employment Size Class</i>												
20-49	25.4	48.9	6.2	6.4	28.9	52.7	9.1	9.3	32.4	56.6	11.9	12.2
50-199	31.2	45.6	8.5	6.4	33.6	48.1	10.3	8.0	36.0	50.6	12.1	9.6
200-499	34.5	42.5	5.6	4.9	37.9	46.0	8.4	7.7	41.3	49.6	11.2	10.5
500-999	33.7	42.3	2.4	3.2	38.5	47.3	6.8	7.4	43.3	52.2	11.1	11.7
≥ 1,000	45.9	34.1	3.1	3.2	49.8	37.9	6.1	6.2	53.6	41.7	9.1	9.2

Source: Eurostat.

Table 8.1.b. Confidence interval example for manufacturing: single market's impact on your firm - harmonization of technical regulations and/or standards

Classification	Lower bound of confidence interval				Estimated value				Upper bound of confidence interval			
	Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know
EUR-12	38.0	42.8	6.7	6.4	39.7	44.5	8.0	7.7	41.5	46.3	9.3	9.0
<i>By Member State</i>												
België/Belgique	23.9	56.1	0.0	7.2	27.1	59.8	2.7	10.4	30.3	63.5	5.9	13.7
Danmark	26.9	50.1	0.0	4.7	32.1	54.5	3.8	9.6	37.3	59.0	8.6	14.4
BR Deutschland	35.5	38.7	7.7	6.9	39.0	42.0	9.9	9.1	42.5	45.4	12.0	11.3
Elláda	50.9	30.1	0.0	5.9	55.4	34.3	0.8	9.6	59.8	38.5	4.0	13.3
España	49.5	35.5	3.3	2.7	52.3	38.2	5.0	4.5	55.0	40.9	6.7	6.2
France	26.3	45.2	3.7	4.8	31.7	50.9	8.2	9.2	37.1	56.6	12.6	13.7
Ireland	44.6	34.6	2.3	2.6	48.9	38.9	6.0	6.2	53.3	43.3	9.6	9.8
Italia	44.5	37.7	2.5	0.4	48.7	41.9	5.7	3.6	52.9	46.1	9.0	6.8
Luxembourg	43.7	32.1	2.5	0.0	50.7	39.0	9.5	0.7	57.7	46.0	16.5	7.7
Nederland	24.9	37.9	0.0	5.0	32.9	47.4	6.2	13.5	40.9	56.9	14.8	22.1
Portugal	42.3	24.0	0.0	3.3	51.7	34.0	2.6	11.8	61.0	44.0	10.7	20.2
United Kingdom	32.3	43.2	8.2	3.0	36.0	47.1	11.1	5.8	39.7	50.9	14.1	8.5
<i>By Manufacturing Sector</i>												
Food, beverages and tobacco	31.7	38.1	6.5	4.9	36.7	43.2	10.9	9.2	41.6	48.4	15.4	13.4
Textiles, leather and furniture	25.3	51.8	3.8	5.1	29.2	56.1	6.7	8.0	33.1	60.4	9.6	11.0
Wood, paper and printing/publishing	17.4	60.5	2.9	5.2	20.9	64.5	6.1	8.5	24.4	68.5	9.4	11.8
Chemicals, rubber and plastics	38.7	36.9	2.8	4.9	43.9	42.1	5.9	8.1	49.0	47.3	8.9	11.4
Non-metallic mineral products	31.2	40.9	0.0	2.4	37.9	47.6	5.8	8.7	44.5	54.3	12.1	15.0
Metals and metal products	34.1	43.6	3.9	3.8	38.4	48.0	6.8	6.8	42.6	52.3	9.8	9.9
Machinery and equipment N.E.C.	39.8	28.3	9.8	1.4	45.4	33.7	14.8	6.1	50.9	39.2	19.8	10.8
Electrical and optical machinery	43.0	28.6	5.1	5.7	48.4	33.6	8.6	9.5	53.7	38.5	12.1	13.3
Transport equipment	45.4	30.9	1.1	0.4	51.9	37.7	5.6	4.9	58.5	44.4	10.0	9.3
<i>By Employment Size Class</i>												
20-49	24.9	48.8	6.1	6.7	28.4	52.7	9.1	9.8	32.0	56.6	12.1	12.8
50-199	31.2	45.4	8.3	6.3	33.7	48.0	10.2	8.0	36.2	50.6	12.1	9.8
200-499	34.3	42.4	5.5	4.8	37.8	46.1	8.3	7.7	41.3	49.8	11.2	10.6
500-999	34.3	41.5	2.7	3.2	39.1	46.5	7.0	7.4	44.0	51.5	11.3	11.6
≥ 1,000	46.9	32.5	3.3	3.7	50.9	36.5	6.1	6.5	55.0	40.4	8.8	9.4

Source: Eurostat.

Table CI M.1. Manufacturing: single market's impact on your firm

Category	Confidence interval	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees			
		Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know
Harmonization of technical regulations and/or standards	Lower bound	29.2	48.1	7.5	6.9	38.0	42.8	6.7	6.4
	Estimated value	31.4	50.6	9.3	8.7	39.7	44.5	8.0	7.7
	Upper bound	33.6	53.0	11.1	10.5	41.5	46.3	9.3	9.0
Mutual recognition of technical regulations and/or standards	Lower bound	29.6	47.0	5.0	9.8	38.0	43.7	3.8	8.4
	Estimated value	31.8	49.5	6.9	11.8	39.7	45.5	5.0	9.8
	Upper bound	34.1	51.9	8.8	13.7	41.4	47.2	6.3	11.1
Conformity assessment procedures	Lower bound	21.1	54.1	3.7	13.1	25.6	53.1	3.1	12.1
	Estimated value	23.2	56.4	5.5	15.0	27.2	54.9	4.5	13.5
	Upper bound	25.2	58.7	7.3	16.8	28.8	56.6	5.8	14.9
Simplified patenting procedures	Lower bound	11.5	61.7	0.2	19.0	22.1	55.7	0.0	16.0
	Estimated value	13.3	63.8	2.0	20.9	23.8	57.4	1.2	17.5
	Upper bound	15.2	66.0	3.8	22.8	25.5	59.2	2.7	19.0
The opening-up of public procurement	Lower bound	7.6	68.6	2.0	14.4	11.8	66.7	3.6	12.1
	Estimated value	9.3	70.6	3.8	16.2	13.2	68.4	4.9	13.5
	Upper bound	11.0	72.7	5.7	18.1	14.6	70.0	6.2	14.9
The elimination of customs documentation	Lower bound	57.9	28.1	2.8	3.0	67.2	21.2	3.9	2.3
	Estimated value	60.2	30.4	4.6	4.8	68.8	22.7	5.0	3.4
	Upper bound	62.6	32.7	6.3	6.6	70.4	24.2	6.2	4.6
Deregulation of freight transport	Lower bound	40.3	40.6	0.8	9.8	48.4	35.9	0.9	8.7
	Estimated value	42.7	43.0	2.6	11.7	50.2	37.6	2.2	10.0
	Upper bound	45.1	45.4	4.5	13.6	52.0	39.3	3.4	11.3
The elimination of delays at frontiers	Lower bound	53.8	33.0	0.0	5.3	61.1	29.3	0.0	4.0
	Estimated value	56.2	35.3	1.5	7.0	62.8	30.9	1.0	5.3
	Upper bound	58.5	37.6	3.2	8.7	64.4	32.6	2.3	6.7
The change in VAT procedures for intra-EU sales	Lower bound	29.9	39.1	13.2	9.2	29.9	35.1	19.0	9.5
	Estimated value	32.3	41.5	15.2	11.1	31.5	36.8	20.6	11.0
	Upper bound	34.6	43.9	17.2	13.0	33.2	38.6	22.2	12.5
The liberalization of capital movements	Lower bound	20.8	58.8	0.2	12.1	27.5	55.9	0.0	10.8
	Estimated value	22.9	61.1	2.0	14.0	29.0	57.6	1.2	12.1
	Upper bound	25.1	63.5	3.7	15.8	30.5	59.3	2.6	13.5
Double-taxation agreements	Lower bound	15.2	57.4	0.3	18.9	23.0	53.3	0.0	17.6
	Estimated value	17.1	59.8	2.2	20.9	24.6	55.1	1.2	19.1
	Upper bound	19.1	62.1	4.1	22.9	26.1	56.9	2.6	20.6

Source: Eurostat.

Table CI M.2. Manufacturing: single market's impact on your company's operations

Category	Confidence interval	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees			
		Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know
Sales to the domestic market	Lower bound	11.2	64.3	12.8	3.5	8.9	68.7	14.1	3.1
	Estimated value	13.4	66.6	14.7	5.3	10.2	70.2	15.3	4.3
	Upper bound	15.5	68.8	16.6	7.1	11.4	71.7	16.6	5.5
Sales to other EU countries	Lower bound	25.9	58.9	2.5	4.5	28.8	58.7	2.9	4.0
	Estimated value	28.1	61.3	4.2	6.3	30.3	60.4	4.1	5.3
	Upper bound	30.4	63.7	6.0	8.1	31.8	62.0	5.3	6.5
Sales to non-EU countries	Lower bound	6.8	76.3	1.8	7.7	6.5	80.2	1.9	6.5
	Estimated value	8.7	78.4	3.5	9.4	7.7	81.6	3.0	7.7
	Upper bound	10.5	80.6	5.1	11.1	8.9	82.9	4.1	8.9
Productivity	Lower bound	13.5	71.5	2.6	4.4	13.0	74.7	1.6	5.3
	Estimated value	15.6	73.7	4.5	6.2	14.2	76.2	2.9	6.6
	Upper bound	17.8	76.0	6.3	8.0	15.5	77.7	4.2	7.9
Profitability	Lower bound	13.7	63.3	10.6	4.3	12.9	65.1	11.3	5.2
	Estimated value	15.8	65.6	12.5	6.1	14.2	66.7	12.6	6.5
	Upper bound	18.0	68.0	14.4	7.9	15.6	68.3	13.8	7.7
Employment	Lower bound	9.5	71.1	8.6	3.2	7.6	71.8	11.6	3.7
	Estimated value	11.6	73.3	10.3	4.8	8.9	73.3	12.8	4.9
	Upper bound	13.7	75.5	12.0	6.5	10.1	74.8	14.1	6.1

Source: Eurostat.

Table CI M.3.a. Manufacturing: single market's importance to development of strategy (sub table 1)

Category	Confidence interval	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees			
		Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know
Product standardization	Lower bound	7.8	16.5	44.3	22.6	9.7	21.4	46.5	16.2
	Estimated value	9.7	18.7	46.7	24.9	11.1	23.1	48.2	17.6
	Upper bound	11.6	10.9	49.1	27.2	12.5	24.8	49.9	19.0
Product specialization	Lower bound	9.1	17.7	42.6	21.5	8.0	19.0	50.7	16.4
	Estimated value	11.2	19.9	45.0	23.9	9.3	20.5	52.4	17.9
	Upper bound	13.2	22.1	47.4	26.3	10.5	22.1	54.0	19.3
Pricing	Lower bound	10.1	21.6	40.5	19.0	10.8	23.1	46.2	13.6
	Estimated value	12.0	24.0	42.9	21.1	12.2	24.7	47.9	15.1
	Upper bound	14.0	26.3	45.2	23.2	13.7	26.3	49.7	16.7
Research and development of new products	Lower bound	9.1	20.3	40.6	21.0	11.0	22.7	44.9	15.3
	Estimated value	11.1	22.5	43.0	23.4	12.4	24.3	46.7	16.7
	Upper bound	13.1	24.8	45.4	25.8	13.7	25.9	48.5	18.1
Capacity of existing production plants	Lower bound	6.3	17.5	44.5	23.1	7.7	20.7	48.5	17.1
	Estimated value	8.3	19.8	46.8	25.0	9.0	22.3	50.2	18.5
	Upper bound	10.4	22.2	49.1	26.9	10.3	23.9	51.9	19.8
Number of existing production plants	Lower bound	1.9	7.6	48.2	33.9	3.3	9.2	55.8	26.0
	Estimated value	3.7	9.7	50.6	36.0	4.5	10.7	57.4	27.4
	Upper bound	5.4	11.9	53.0	38.0	5.7	12.2	59.0	28.8
Establishment of plants in other EU states	Lower bound	0.5	5.3	47.6	38.2	3.0	10.4	52.1	28.7
	Estimated value	2.4	7.4	49.9	40.3	4.2	11.9	53.8	30.1
	Upper bound	4.2	9.6	52.2	42.5	5.4	13.4	55.4	31.5
Lean production methods	Lower bound	3.8	13.4	42.6	31.7	9.0	20.4	41.9	22.5
	Estimated value	5.6	15.6	44.9	33.9	10.4	22.0	43.6	24.0
	Upper bound	7.4	17.9	47.1	36.1	11.8	23.6	45.3	25.4
Penetration of markets in other EU states	Lower bound	8.2	20.0	40.3	23.3	9.9	24.6	43.9	15.5
	Estimated value	10.1	22.0	42.6	25.3	11.3	26.2	45.6	16.9
	Upper bound	11.9	24.1	44.8	27.3	12.7	27.8	47.3	18.3
Advertising in other EU states	Lower bound	2.8	13.3	49.0	27.2	3.7	16.8	53.3	20.2
	Estimated value	4.5	15.5	51.0	29.1	5.0	18.4	55.0	21.6
	Upper bound	6.2	17.6	53.0	31.0	6.2	20.1	56.6	23.1
Distribution networks in other EU states	Lower bound	4.0	14.0	46.3	27.5	6.8	20.2	47.4	19.6
	Estimated value	5.7	16.2	48.6	29.5	8.1	21.8	49.1	21.0
	Upper bound	7.5	18.3	50.9	31.5	9.3	23.4	50.8	22.4

Source: Eurostat.

Table CI M.3.b. Manufacturing: single market's importance to development of strategy (sub table 2)

Category	Confidence interval	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees			
		Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know
Pan-European labelling	Lower bound	4.7	13.8	45.1	28.4	7.6	19.5	46.1	21.0
	Estimated value	6.4	15.8	47.4	30.4	8.8	21.1	47.8	22.4
	Upper bound	8.1	17.9	49.6	32.4	10.0	22.6	49.5	23.8
Purchase of raw materials from other EU markets	Lower bound	7.9	21.3	45.2	17.0	9.4	28.8	43.7	11.9
	Estimated value	9.8	23.5	47.5	19.1	10.8	30.5	45.4	13.3
	Upper bound	11.8	25.7	49.8	21.3	12.1	32.2	47.1	14.7
Purchase of components from other EU markets	Lower bound	5.0	15.8	49.5	21.4	7.0	23.0	49.1	14.6
	Estimated value	6.7	18.0	51.8	23.5	8.3	24.7	50.8	16.1
	Upper bound	8.5	20.1	54.1	25.6	9.7	26.4	52.6	17.6
Purchase of business services from other EU markets	Lower bound	0.5	5.2	57.8	29.1	1.1	9.8	63.1	20.1
	Estimated value	2.0	7.1	59.9	31.1	2.5	11.3	64.6	21.6
	Upper bound	3.5	9.0	61.9	33.0	3.9	12.9	66.0	23.0
Purchase of financial services from other EU markets	Lower bound	0.0	4.2	55.9	32.7	1.1	8.5	60.6	24.0
	Estimated value	1.4	6.2	57.8	34.6	2.3	10.1	62.2	25.5
	Upper bound	3.0	8.2	59.7	36.5	3.5	11.6	63.7	26.9
(Direct) Investment in other companies	Lower bound	0.2	4.6	46.1	41.5	2.8	10.0	48.8	32.3
	Estimated value	1.8	6.6	48.2	43.4	4.1	11.6	50.4	33.9
	Upper bound	3.5	8.5	50.3	45.3	5.5	13.2	52.1	35.4
(Direct) Investment from other companies	Lower bound	0.0	3.7	46.9	42.0	1.1	5.0	52.5	35.3
	Estimated value	1.5	5.7	48.8	43.9	2.4	6.6	54.1	36.9
	Upper bound	3.3	7.8	50.8	45.8	3.7	8.3	55.7	38.5
Co-operation agreements with other companies	Lower bound	1.0	8.7	40.1	42.2	3.6	11.4	45.1	33.8
	Estimated value	2.9	10.8	42.1	44.1	4.9	12.9	46.8	35.4
	Upper bound	4.8	12.9	44.2	46.1	6.1	14.3	48.5	37.0

Source: Eurostat.

Table CI M.4. Manufacturing: Any change in competition in the domestic market

Category	Confidence interval	Percentage of enterprises expressing opinion			Percentage of enterprises offering opinion expressed in number of salaried employees		
		Increase	No change	Decrease	Increase	No change	Decrease
Competitors: domestically owned enterprises	Lower bound	22.9	61.4	9.1	18.1	68.9	9.1
	Estimated value	25.1	63.8	11.1	19.4	70.4	10.2
	Upper bound	27.3	66.2	13.1	20.7	71.8	11.4
Competitors: other EU-owned enterprises	Lower bound	36.7	56.7	0.6	41.1	52.9	1.2
	Estimated value	38.7	58.9	2.4	42.7	54.5	2.7
	Upper bound	40.8	61.0	4.2	44.4	56.2	4.2
Competitors: non-EU-owned enterprises	Lower bound	22.8	71.6	0.0	30.2	64.5	0.6
	Estimated value	24.7	73.5	1.7	31.8	66.1	2.1
	Upper bound	26.7	75.5	3.6	33.4	67.7	3.6
Price competition: domestically owned enterprises	Lower bound	42.0	48.7	2.5	41.4	51.8	1.6
	Estimated value	44.4	51.1	4.5	43.2	53.6	3.2
	Upper bound	46.9	53.5	6.4	45.0	55.4	4.7
Price competition: other EU-owned enterprises	Lower bound	38.6	52.8	2.4	50.3	43.4	1.4
	Estimated value	40.7	55.0	4.3	51.9	45.1	2.9
	Upper bound	42.8	57.2	6.2	53.6	46.8	4.5
Price competition: non-EU-owned firms	Lower bound	27.2	64.7	2.0	36.8	56.9	1.3
	Estimated value	29.3	66.9	3.8	38.5	58.7	2.9
	Upper bound	31.4	69.1	5.6	40.2	60.4	4.4
Quality competition: domestically owned enterprises	Lower bound	30.6	61.8	1.0	30.3	63.9	1.0
	Estimated value	32.9	64.1	3.0	32.0	65.5	2.5
	Upper bound	35.2	66.4	5.1	33.6	67.2	4.0
Quality competition: other EU-owned enterprises	Lower bound	27.0	66.4	0.3	33.7	60.9	0.5
	Estimated value	29.2	68.6	2.2	35.4	62.6	2.0
	Upper bound	31.4	70.7	4.2	37.1	64.3	3.5
Quality competition: non-EU-owned enterprises	Lower bound	16.2	77.2	0.9	23.7	70.9	0.7
	Estimated value	18.1	79.2	2.7	25.3	72.6	2.2
	Upper bound	20.1	81.2	4.5	26.9	74.2	3.7

Source: Eurostat.

Table CI M.5. Manufacturing: the extent to which the implementation of the SMP has affected

Category	Confidence interval	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees			
		Increase	No change	Reduction	Don't know	Increase	No change	Reduction	Don't know
Unit cost of typical or average product	Lower bound	12.5	50.5	12.3	16.0	8.7	53.1	18.9	13.1
	Estimated value	14.7	52.8	14.4	18.2	10.2	54.9	20.4	14.5
	Upper bound	16.8	55.1	16.4	20.3	11.7	56.6	21.9	16.0

Source: Eurostat.

Table CI M.6. Manufacturing: importance in changing unit costs

Category	Confidence interval	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees			
		Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know
Production process	Lower bound	8.5	10.3	31.1	41.4	10.2	11.1	30.3	41.8
	Estimated value	10.4	12.2	33.3	44.0	11.6	12.5	32.0	44.0
	Upper bound	12.3	14.2	35.6	46.6	13.0	13.9	33.6	46.1
Testing and certification	Lower bound	5.7	9.7	34.7	41.1	5.5	12.1	33.7	41.9
	Estimated value	7.3	11.7	37.0	44.0	6.9	13.7	35.5	44.0
	Upper bound	9.0	13.7	39.3	46.9	8.2	15.2	37.2	46.1
Distribution costs	Lower bound	4.5	13.5	32.4	41.1	4.7	16.1	30.6	42.1
	Estimated value	6.2	15.3	34.7	43.8	6.1	17.6	32.3	43.9
	Upper bound	7.8	17.2	37.0	46.5	7.5	19.2	34.0	45.8
Marketing costs	Lower bound	1.5	10.1	38.4	41.4	2.4	10.8	38.5	41.7
	Estimated value	3.1	12.1	40.6	44.1	3.6	12.3	40.1	44.0
	Upper bound	4.7	14.1	42.9	46.9	4.8	13.8	41.7	46.2
Costs of raw materials	Lower bound	13.9	12.3	24.0	41.2	13.3	13.9	24.7	41.8
	Estimated value	15.9	14.2	26.2	43.7	14.7	15.4	26.2	43.7
	Upper bound	18.0	16.0	28.5	46.2	16.2	16.9	27.8	45.6
Banking costs	Lower bound	4.2	8.9	37.6	40.4	2.4	8.4	40.8	41.9
	Estimated value	5.9	10.8	39.8	43.6	3.7	10.0	42.4	43.9
	Upper bound	7.6	12.6	42.0	46.7	5.0	11.5	44.0	46.0
Insurance costs	Lower bound	1.8	8.7	39.7	40.6	0.8	7.1	43.6	41.7
	Estimated value	3.4	10.8	42.0	43.8	2.0	8.7	45.3	44.1
	Upper bound	5.0	12.8	44.3	47.1	3.2	10.2	46.9	46.4
Other cost sources	Lower bound	0.9	0.8	22.5	68.2	1.8	0.7	26.4	64.1
	Estimated value	2.3	2.4	24.2	71.1	3.1	2.2	27.9	66.8
	Upper bound	3.6	4.1	26.0	73.9	4.3	3.7	29.5	69.5

Source: Eurostat.

Table CI M.7. Manufacturing: single market legislation as it affects your own firm or sector

Category	Confidence interval	Percentage of enterprises expressing opinion			Percentage of enterprises offering opinion expressed in number of salaried employees		
		Increase	No change	Decrease	Increase	No change	Decrease
The single market programme has been a success for your firm	Lower bound	30.6	37.9	24.8	38.5	33.1	23.3
	Estimated value	32.9	40.0	27.1	40.3	34.8	25.0
	Upper bound	35.2	42.2	29.3	42.0	36.4	26.6
The SM has been a success for your sector in your country	Lower bound	22.7	41.7	28.9	24.2	40.1	30.6
	Estimated value	25.0	43.9	31.1	25.8	41.8	32.4
	Upper bound	27.2	46.2	33.3	27.5	43.6	34.1
The SM has been a success for your sector in the EU	Lower bound	26.4	48.8	18.2	31.9	42.9	20.3
	Estimated value	28.7	51.1	20.2	33.6	44.6	21.8
	Upper bound	30.9	53.4	22.3	35.2	46.3	23.3
The SM has been successful in eliminating obstacles to EU trade	Lower bound	38.2	36.8	18.3	42.2	32.7	20.1
	Estimated value	40.5	39.1	20.3	44.0	34.4	21.6
	Upper bound	42.9	41.4	22.4	45.8	36.2	23.2
The SM has been successful in creating a genuine single market ¹	Lower bound	20.2	40.2	32.0	23.3	38.6	32.2
	Estimated value	22.4	42.4	34.3	24.9	40.4	34.0
	Upper bound	24.5	44.6	36.7	26.5	42.2	35.7
Additional measures are needed to eliminate obstacles to EU trade	Lower bound	24.8	58.8	10.3	28.4	55.8	11.2
	Estimated value	26.9	61.0	12.1	30.0	57.5	12.5
	Upper bound	29.1	63.2	13.9	31.6	59.2	13.8
Additional measures are needed in this sector to create a genuine single market ¹	Lower bound	22.2	58.7	11.9	25.7	56.1	12.7
	Estimated value	24.3	60.8	14.0	27.3	57.8	14.1
	Upper bound	26.5	63.0	16.0	29.0	59.5	15.5

¹ EUR-11 = EUR-12 excluding Ireland.

Source: Eurostat.

Table CI C.1. Construction: single market's impact on your firm¹

Category	Confidence interval	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees			
		Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know
Measures to facilitate cross-border operations in other EU states	Lower bound	17.4	52.9	0.0	2.0	22.9	55.1	0.0	5.5
	Estimated value	26.2	62.0	1.1	10.6	28.1	60.5	0.9	10.5
	Upper bound	35.1	71.2	9.7	19.3	33.4	65.9	5.8	15.5
The opening-up of public procurement	Lower bound	3.8	50.4	8.6	1.9	10.7	48.5	15.8	3.4
	Estimated value	12.3	59.6	17.4	10.7	15.9	54.2	21.2	8.7
	Upper bound	20.8	68.7	26.3	19.4	21.1	59.8	26.7	14.0
The liberalization of capital movements	Lower bound	10.7	54.6	0.0	6.6	14.6	58.1	0.0	10.0
	Estimated value	19.3	63.6	1.7	15.4	19.7	63.5	1.7	15.1
	Upper bound	27.9	72.6	10.4	24.2	24.8	68.8	6.7	20.2
Double-taxation agreements	Lower bound	1.1	50.0	0.0	21.0	9.8	53.3	0.0	19.5
	Estimated value	9.6	59.2	1.1	30.1	14.9	59.0	1.1	25.0
	Upper bound	18.1	68.4	10.1	39.2	20.1	64.6	6.4	30.5

¹ EUR-11 = EUR-12 excluding Elláda.

Source: Eurostat.

Table CI C.2. Construction: single market's impact on your company's operations¹

Category	Confidence interval	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees			
		Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know
Sales to the domestic market	Lower bound	2.5	59.9	4.7	0.0	6.5	59.7	11.8	1.4
	Estimated value	10.8	68.8	13.2	7.1	11.5	65.2	16.9	6.4
	Upper bound	19.1	77.7	21.8	15.6	16.5	70.6	22.0	11.4
Sales to other EU countries	Lower bound	2.3	60.6	0.0	8.9	6.3	65.6	0.0	10.2
	Estimated value	10.7	69.2	2.5	17.5	11.1	70.7	3.1	15.1
	Upper bound	19.1	77.9	10.8	26.1	15.9	75.8	7.8	20.0
Sales to non-EU countries	Lower bound	0.3	62.8	0.0	10.3	2.3	69.2	0.0	12.4
	Estimated value	8.5	71.6	0.9	19.0	7.0	74.3	1.4	17.3
	Upper bound	16.7	80.3	9.3	27.7	11.7	79.4	6.1	22.3
Productivity	Lower bound	1.1	60.3	0.0	6.4	6.4	66.2	1.3	6.4
	Estimated value	9.9	68.9	6.1	15.1	11.4	71.2	6.1	11.2
	Upper bound	18.7	77.5	14.8	23.7	16.4	76.2	11.0	16.1
Profitability	Lower bound	0.0	54.6	10.0	0.7	2.8	59.1	14.4	3.0
	Estimated value	8.6	63.4	18.6	9.4	7.9	64.4	19.6	8.0
	Upper bound	17.5	72.1	27.3	18.0	13.1	69.7	24.7	13.0
Employment	Lower bound	0.0	59.8	7.6	0.0	2.3	62.6	13.3	2.0
	Estimated value	7.5	68.4	16.2	7.9	7.2	67.7	18.3	6.8
	Upper bound	16.2	77.1	24.8	16.4	12.1	72.8	23.3	11.7

¹ EUR-11 = EUR-12 excluding Elláda.

Source: Eurostat.

Table CI C.3. Construction: single market's importance to development of strategy¹

Category	Confidence interval	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees			
		Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know
Products/services standardization	Lower bound	0.0	8.2	26.6	29.8	1.8	13.0	34.5	30.4
	Estimated value	8.0	17.1	35.8	39.1	6.5	18.1	39.8	35.6
	Upper bound	16.8	26.0	45.0	48.3	11.3	23.2	45.1	40.8
Products/services specialization	Lower bound	0.0	8.2	24.6	32.8	0.9	11.9	35.3	31.6
	Estimated value	6.9	17.3	33.7	42.1	5.6	17.0	40.5	36.9
	Upper bound	15.5	26.4	42.8	51.3	10.3	22.2	45.8	42.1
Pricing	Lower bound	0.0	9.5	34.7	23.8	0.9	12.5	41.3	23.8
	Estimated value	4.8	18.4	43.8	33.0	6.0	17.8	46.8	29.3
	Upper bound	13.2	27.3	53.0	42.3	11.1	23.1	52.4	34.9
Development of new products/services	Lower bound	0.0	10.9	28.6	29.5	0.0	13.2	37.9	28.4
	Estimated value	3.7	19.6	37.8	38.8	4.0	18.6	43.4	34.0
	Upper bound	12.1	28.3	47.1	48.2	9.1	23.9	48.9	39.6
Increase in cross-border provision of services to other EU states	Lower bound	0.0	0.8	28.8	36.5	0.0	6.3	35.1	36.9
	Estimated value	6.3	10.0	38.0	45.7	5.0	11.7	40.7	42.5
	Upper bound	14.8	19.1	47.3	54.9	10.1	17.2	46.3	48.2
Distribution networks in other EU markets	Lower bound	0.0	0.0	25.1	45.9	0.0	0.6	32.6	45.9
	Estimated value	5.8	4.8	34.3	55.1	4.3	6.0	38.2	51.5
	Upper bound	14.4	13.8	43.5	64.3	9.5	11.4	43.7	57.1
Advertising in other EU markets	Lower bound	0.0	0.0	26.8	44.7	0.0	0.4	35.4	43.6
	Estimated value	5.5	4.5	36.0	53.9	3.7	5.9	41.1	49.3
	Upper bound	14.1	13.6	45.3	63.2	9.0	11.4	46.7	55.0
Purchase of business services from other EU markets	Lower bound	0.0	7.8	28.8	32.7	0.4	13.9	35.3	28.5
	Estimated value	3.3	16.7	38.0	42.0	5.7	19.3	40.9	34.1
	Upper bound	12.2	25.6	47.2	51.2	11.0	24.7	46.5	39.7
Purchase of financial services from other EU markets	Lower bound	0.0	0.4	29.9	41.0	0.0	4.1	40.2	36.8
	Estimated value	1.5	9.2	39.1	50.2	2.5	9.5	45.7	42.3
	Upper bound	10.0	17.9	48.3	59.4	7.6	14.9	51.2	47.9
(Direct) Investment in other companies	Lower bound	0.0	0.0	28.0	45.3	0.0	4.1	35.4	42.3
	Estimated value	0.8	7.5	37.2	54.5	2.4	9.2	40.8	47.6
	Upper bound	9.3	16.6	46.5	63.7	7.2	14.4	46.1	52.9
Co-operation agreements with other companies	Lower bound	0.0	5.0	21.5	44.7	0.0	8.9	30.1	40.9
	Estimated value	1.8	13.9	30.6	53.8	3.6	14.3	35.6	46.5
	Upper bound	10.3	22.8	39.6	62.8	8.6	19.7	41.2	52.0

¹ EUR-11 = EUR-12 excluding Elláda.

Source: Eurostat.

Table CI C.4. Construction: any change in competition in the domestic market¹

Category	Confidence interval	Percentage of enterprises expressing opinion			Percentage of enterprises offering opinion expressed in number of salaried employees		
		Increase	No change	Decrease	Increase	No change	Decrease
Competitors: domestically owned enterprises	Lower bound	24.9	47.3	0.5	29.9	49.4	4.4
	Estimated value	34.1	56.5	9.4	35.4	55.0	9.6
	Upper bound	43.2	65.7	18.4	41.0	60.5	14.9
Competitors: other EU-owned enterprises	Lower bound	23.0	53.9	0.0	38.2	48.6	0.0
	Estimated value	32.0	62.9	5.1	43.4	53.7	2.9
	Upper bound	41.0	71.9	13.8	48.5	58.9	7.8
Competitors: non-EU-owned enterprises	Lower bound	6.6	66.3	1.7	14.8	70.4	1.4
	Estimated value	15.2	74.9	10.0	19.3	74.9	5.7
	Upper bound	23.7	83.5	18.2	23.8	79.5	10.0
Price competition: domestically owned enterprises	Lower bound	37.2	40.9	0.0	48.1	36.9	0.0
	Estimated value	46.4	50.1	3.5	53.7	42.5	3.7
	Upper bound	55.7	59.4	12.1	59.4	48.2	9.0
Price competition: other EU-owned enterprises	Lower bound	24.2	63.6	0.7	34.3	55.4	0.0
	Estimated value	28.4	67.9	3.7	37.9	59.1	3.1
	Upper bound	32.7	72.2	6.7	41.5	62.7	6.1
Price competition: non-EU-owned firms	Lower bound	11.3	77.9	0.8	18.2	73.0	0.5
	Estimated value	14.6	81.6	3.8	21.0	76.0	3.0
	Upper bound	17.9	85.2	6.8	23.8	79.0	5.6
Product competition: domestically owned enterprises	Lower bound	25.7	53.5	0.0	32.3	54.4	0.0
	Estimated value	34.8	62.7	2.6	37.6	59.7	2.7
	Upper bound	43.9	71.8	11.1	42.9	65.1	7.6
Product competition: other EU-owned enterprises	Lower bound	12.5	68.0	0.0	20.8	67.4	0.0
	Estimated value	21.0	76.6	2.4	25.5	72.2	2.4
	Upper bound	29.6	85.2	10.8	30.2	76.9	6.9
Product competition: non-EU-owned enterprises	Lower bound	5.3	86.4	1.1	9.4	82.3	0.8
	Estimated value	7.6	89.1	3.3	11.9	85.0	3.2
	Upper bound	10.0	91.8	5.4	14.3	87.6	5.5

¹ EUR-11 = EUR-12 excluding Elláda.

Source: Eurostat.

Table CI C.5. Construction: single market legislation as it affects your own firm or sector¹

Category	Confidence interval	Percentage of enterprises expressing opinion			Percentage of enterprises offering opinion expressed in number of salaried employees		
		Increase	No change	Decrease	Increase	No change	Decrease
The single market programme has been a success for your firm	Lower bound	7.4	42.1	24.6	12.3	42.7	28.9
	Estimated value	15.7	50.9	33.4	17.4	48.2	34.4
	Upper bound	23.9	59.8	42.3	22.6	53.7	39.8
The SM has been a success for your sector in your country	Lower bound	16.3	42.0	28.5	14.9	39.9	32.7
	Estimated value	20.4	46.6	33.0	18.9	44.2	36.9
	Upper bound	24.4	51.2	37.5	22.9	48.5	41.2
The SM has been a success for your sector in the EU	Lower bound	3.9	51.3	18.3	10.7	52.1	21.0
	Estimated value	12.6	60.2	27.2	16.0	57.6	26.4
	Upper bound	21.4	69.2	36.0	21.3	63.1	31.9
The SM has been successful in eliminating obstacles to EU trade	Lower bound	15.6	47.6	10.8	18.3	49.6	16.0
	Estimated value	24.1	56.4	19.5	23.6	55.2	21.3
	Upper bound	32.6	65.3	28.1	28.8	60.7	26.6
The SM has been successful in creating a genuine single market ²	Lower bound	0.0	50.6	25.1	2.9	50.5	29.9
	Estimated value	5.7	59.6	34.1	8.2	56.0	35.4
	Upper bound	14.5	68.6	43.0	13.5	61.6	40.9
Additional measures are needed to eliminate obstacles to EU trade	Lower bound	7.1	63.9	4.0	15.9	61.3	8.0
	Estimated value	15.4	72.4	12.2	20.8	66.4	12.8
	Upper bound	23.6	80.9	20.5	25.7	71.5	17.7
Additional measures are needed in this sector to create a genuine single market ²	Lower bound	22.7	61.1	5.4	23.4	59.0	6.6
	Estimated value	25.9	65.0	8.5	26.9	62.8	9.9
	Upper bound	29.2	68.8	11.6	30.4	66.6	13.2

¹ EUR-11= EUR-12 excluding Ireland.² EUR 10 = EUR-12 excluding Elláda and Ireland.

Source: Eurostat.

Table CI D.1. Distributive trade: single market's impact on your firm

Category	Confidence interval	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees			
		Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know
Harmonization of licensing/authorization requirements in EU	Lower bound	6.5	64.9	1.0	17.2	10.3	65.7	1.8	13.3
	Estimated value	9.2	67.6	3.4	19.9	12.6	68.2	3.8	15.4
	Upper bound	11.8	70.3	5.7	22.7	14.8	70.6	5.9	17.6
Recognition of licences/authorizations in other EU states	Lower bound	5.0	65.4	0.4	18.8	7.7	68.7	0.2	14.7
	Estimated value	7.5	68.2	2.7	21.6	9.9	71.0	2.3	16.9
	Upper bound	10.1	71.0	5.0	24.4	12.0	73.2	4.3	19.1
Measures to facilitate cross-border operations in other EU states	Lower bound	21.7	52.1	2.5	10.8	28.2	50.4	3.8	7.5
	Estimated value	25.1	56.0	5.1	13.8	31.1	53.4	5.8	9.6
	Upper bound	28.6	59.8	7.7	16.8	34.0	56.5	7.8	11.8
Measures to facilitate physical establishment in other EU states	Lower bound	4.6	67.8	0.0	16.3	8.9	68.2	0.5	12.8
	Estimated value	7.6	70.9	2.0	19.5	11.3	70.9	2.7	15.1
	Upper bound	10.5	74.0	5.1	22.8	13.8	73.6	4.9	17.3
The opening-up of public procurement	Lower bound	4.1	69.6	0.0	15.0	5.1	72.0	1.3	12.8
	Estimated value	6.9	72.9	2.0	18.2	7.1	74.5	3.3	15.0
	Upper bound	9.7	76.2	4.7	21.3	9.1	77.1	5.4	17.2
The liberalization of capital movements	Lower bound	10.8	67.7	0.0	13.1	14.4	66.5	0.0	10.4
	Estimated value	13.0	70.6	1.0	15.4	16.8	69.3	1.4	12.6
	Upper bound	15.2	73.6	2.9	17.7	19.1	72.0	3.5	14.8
Double-taxation agreements	Lower bound	5.7	63.2	0.0	19.4	10.7	63.3	0.0	16.6
	Estimated value	8.9	66.9	1.5	22.7	13.2	66.3	1.5	19.1
	Upper bound	12.0	70.6	4.5	26.0	15.7	69.2	3.7	21.5

Source: Eurostat.

Table CI D.2. Distributive trade: single market's impact on your company's operations

Category	Confidence interval	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees			
		Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know
Sales to the domestic market	Lower bound	7.2	67.1	8.0	7.7	8.0	69.9	8.3	5.1
	Estimated value	9.4	70.5	10.2	9.9	10.1	72.5	10.3	7.1
	Upper bound	11.7	73.9	12.3	12.2	12.1	75.0	12.4	9.1
Sales to other EU countries	Lower bound	7.7	69.8	0.0	10.9	9.6	72.3	0.3	9.1
	Estimated value	11.0	73.4	1.8	13.9	11.9	74.7	2.2	11.2
	Upper bound	14.2	77.0	4.5	16.9	14.1	77.2	4.2	13.2
Sales to non-EU countries	Lower bound	0.7	76.3	0.0	12.5	1.8	79.4	0.0	10.7
	Estimated value	3.6	79.5	1.2	15.6	3.9	81.6	1.5	12.9
	Upper bound	6.6	82.6	4.1	18.8	6.1	83.9	3.6	15.1
Productivity	Lower bound	4.7	73.7	0.0	8.7	6.8	76.1	1.5	6.7
	Estimated value	7.8	77.2	3.0	12.0	8.9	78.6	3.7	8.9
	Upper bound	10.9	80.7	6.1	15.2	11.0	81.0	5.8	11.1
Profitability	Lower bound	6.3	67.5	6.5	8.9	8.1	68.7	8.1	6.0
	Estimated value	8.4	70.8	9.1	11.7	10.2	71.3	10.3	8.2
	Upper bound	10.5	74.1	11.7	14.4	12.3	73.9	12.5	10.4
Employment	Lower bound	2.3	74.3	5.1	6.6	4.5	75.6	6.1	4.5
	Estimated value	5.3	77.5	7.9	9.4	6.8	78.1	8.3	6.7
	Upper bound	8.2	80.6	10.7	12.2	9.1	80.6	10.6	9.0

Source: Eurostat.

Table CI D.3.a. Distributive trade: single market's importance to development of strategy (sub table 1)

Category	Confidence interval	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees			
		Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know
More standardized products/services	Lower bound	1.2	11.0	40.2	33.7	2.4	12.6	45.4	28.3
	Estimated value	3.6	14.7	44.2	37.5	4.8	15.4	48.5	31.3
	Upper bound	5.9	18.3	48.2	41.3	7.1	18.3	51.6	34.3
More specialized products/services	Lower bound	4.0	9.6	39.9	33.2	2.2	9.4	48.9	28.0
	Estimated value	6.5	12.8	43.8	37.0	4.8	12.2	52.0	31.0
	Upper bound	9.0	15.9	47.6	40.8	7.4	15.0	55.0	34.0
Pricing	Lower bound	3.8	15.3	39.2	27.8	4.2	14.4	45.9	24.1
	Estimated value	6.7	18.8	43.0	31.5	6.7	17.3	48.9	27.1
	Upper bound	9.6	22.3	46.7	35.2	9.2	20.2	52.0	30.0
Development of new products/services	Lower bound	3.6	11.8	38.0	33.0	3.7	13.6	44.6	27.2
	Estimated value	6.2	15.2	41.9	36.8	5.7	16.4	47.7	30.2
	Upper bound	8.7	18.6	45.8	40.5	7.7	19.3	50.8	33.1
Efficiency in the provision of products/services	Lower bound	4.6	8.6	40.2	33.0	4.8	11.6	44.9	27.4
	Estimated value	7.1	12.1	44.1	36.7	7.0	14.6	48.0	30.4
	Upper bound	9.6	15.6	48.0	40.4	9.2	17.6	51.1	33.4
Increase in cross-border provision of services to other EU states	Lower bound	1.1	5.2	38.7	41.8	2.1	8.0	42.2	36.8
	Estimated value	3.5	8.4	42.6	45.6	4.1	10.7	45.3	39.8
	Upper bound	5.8	11.7	46.4	49.3	6.1	13.5	48.4	42.9
Establishment of operations in other EU states	Lower bound	0.9	1.3	41.2	43.3	1.5	5.1	43.8	38.4
	Estimated value	3.2	5.0	44.8	47.0	3.6	8.0	46.9	41.5
	Upper bound	5.5	8.7	48.5	50.6	5.7	10.8	50.0	44.6
Distribution networks in other EU markets	Lower bound	0.5	3.2	40.7	42.9	1.5	4.8	44.7	37.8
	Estimated value	2.8	6.3	44.3	46.6	3.9	7.4	47.7	40.9
	Upper bound	5.0	9.4	47.9	50.3	6.3	10.1	50.8	43.9
Advertising in other EU markets	Lower bound	0.5	1.8	39.2	45.7	0.4	2.2	45.6	40.4
	Estimated value	2.8	5.1	42.8	49.3	2.8	5.1	48.6	43.4
	Upper bound	5.2	8.4	46.4	52.9	5.2	8.1	51.7	46.5
Purchase of business services from other EU markets	Lower bound	1.0	3.4	40.5	42.0	1.2	5.4	46.7	35.2
	Estimated value	3.4	7.0	44.0	45.7	3.7	8.4	49.7	38.2
	Upper bound	5.8	10.5	47.5	49.4	6.2	11.3	52.7	41.3
Purchase of financial services from other EU markets	Lower bound	0.0	2.3	40.5	45.2	0.0	3.6	47.4	38.5
	Estimated value	1.2	5.9	44.1	48.8	1.7	6.5	50.3	41.4
	Upper bound	4.1	9.5	47.7	52.4	3.9	9.5	53.3	44.4

Source: Eurostat.

Table CI D.3.b. Distributive trade: single market's importance to development of strategy (sub table 2)

Category	Confidence interval	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees			
		Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know
(Direct) Investment in other companies	Lower bound	0.0	1.8	36.9	50.6	0.0	3.3	42.3	43.8
	Estimated value	0.8	5.2	40.1	53.9	1.6	6.2	45.3	46.8
	Upper bound	3.5	8.5	43.4	57.2	3.6	9.2	48.3	49.8
(Direct) Investment from other companies	Lower bound	0.0	0.6	37.6	51.3	0.0	0.8	43.6	45.2
	Estimated value	0.5	4.1	40.8	54.6	1.4	3.8	46.6	48.2
	Upper bound	2.8	7.6	44.1	57.8	4.0	6.8	49.5	51.2
Co-operation agreements with other companies	Lower bound	0.0	3.2	31.3	53.4	0.0	3.0	37.8	47.6
	Estimated value	2.1	6.5	34.7	56.7	2.6	5.9	40.8	50.6
	Upper bound	4.4	9.7	38.2	60.0	5.3	8.8	43.8	53.6

Source: Eurostat.

Table CI D.4. Distributive trade: any change in competition in the domestic market

Category	Confidence interval	Percentage of enterprises expressing opinion			Percentage of enterprises offering opinion expressed in number of salaried employees		
		Increase	No change	Decrease	Increase	No change	Decrease
Competitors: domestically owned enterprises	Lower bound	24.9	60.9	3.3	24.4	63.5	4.5
	Estimated value	28.8	65.0	6.2	27.0	66.2	6.8
	Upper bound	32.6	69.1	9.2	29.7	68.9	9.0
Competitors: other EU-owned enterprises	Lower bound	28.5	63.1	0.0	31.5	62.6	0.0
	Estimated value	32.2	66.8	1.0	34.1	65.2	0.8
	Upper bound	35.9	70.5	4.1	36.6	67.7	3.1
Competitors: non-EU-owned enterprises	Lower bound	7.0	87.7	0.0	9.2	86.8	0.0
	Estimated value	8.8	89.7	1.4	10.6	88.3	1.1
	Upper bound	10.7	91.7	3.2	12.0	89.7	2.4
Price competition: domestically owned enterprises	Lower bound	33.8	55.8	0.0	37.5	54.6	0.0
	Estimated value	37.9	59.9	2.2	40.5	57.6	1.9
	Upper bound	41.9	64.0	5.2	43.5	60.6	4.5
Price competition: other EU-owned enterprises	Lower bound	25.3	64.9	0.0	30.2	62.6	0.0
	Estimated value	28.8	68.4	2.7	32.8	65.1	2.1
	Upper bound	32.4	72.0	5.5	35.3	67.7	4.3
Price competition: non-EU-owned firms	Lower bound	8.0	82.0	1.3	10.9	82.9	1.1
	Estimated value	10.9	85.1	3.9	12.7	84.7	2.6
	Upper bound	13.8	88.3	6.6	14.4	86.6	4.1
Quality competition: domestically owned enterprises	Lower bound	24.1	65.3	0.0	26.2	66.6	0.0
	Estimated value	28.1	69.4	2.6	28.7	69.2	2.0
	Upper bound	32.1	73.4	5.6	31.3	71.8	4.2
Quality competition: other EU-owned enterprises	Lower bound	16.3	75.6	0.0	19.7	74.1	0.0
	Estimated value	19.4	78.8	1.9	22.0	76.4	1.7
	Upper bound	22.4	81.9	4.0	24.2	78.7	3.7
Quality competition: non-EU-owned enterprises	Lower bound	5.4	87.2	0.1	7.7	87.2	0.1
	Estimated value	7.8	89.8	2.4	9.4	88.9	1.7
	Upper bound	10.2	92.5	4.7	11.1	90.7	3.3

Source: Eurostat.

Table CI D.5. Distributive trade: single market legislation as it affects your own firm or sector

Category	Confidence interval	Percentage of enterprises expressing opinion			Percentage of enterprises offering opinion expressed in number of salaried employees		
		Increase	No change	Decrease	Increase	No change	Decrease
The single market programme has been a success for your firm	Lower bound	14.8	54.0	19.6	18.9	52.5	19.7
	Estimated value	18.4	58.2	23.4	21.7	55.7	22.6
	Upper bound	22.1	62.3	27.3	24.6	58.8	25.5
The SM has been a success for your sector in your country	Lower bound	15.4	54.4	18.7	16.7	54.7	20.5
	Estimated value	18.9	58.5	22.6	19.2	57.6	23.2
	Upper bound	22.3	62.7	26.5	21.8	60.5	25.8
The SM has been a success for your sector in the EU	Lower bound	12.8	64.5	12.1	16.0	62.4	13.5
	Estimated value	16.3	68.5	15.3	18.6	65.3	16.1
	Upper bound	19.8	72.4	18.4	21.2	68.3	18.7
The SM has been successful in eliminating obstacles to EU trade	Lower bound	23.4	55.0	10.5	26.3	50.7	14.2
	Estimated value	27.2	59.1	13.7	29.2	53.8	16.9
	Upper bound	30.9	63.2	17.0	32.1	57.0	19.7
The SM has been successful in creating a genuine single market ¹	Lower bound	9.7	59.8	18.4	13.4	55.3	21.7
	Estimated value	12.9	63.8	22.1	16.0	58.4	24.7
	Upper bound	16.1	67.7	25.9	18.5	61.6	27.7
Additional measures are needed to eliminate obstacles to EU trade	Lower bound	15.7	68.0	5.4	17.8	68.1	7.1
	Estimated value	19.5	72.0	8.5	20.2	70.7	9.1
	Upper bound	23.3	76.0	11.6	22.6	73.2	11.1
Additional measures are needed in this sector to create a genuine single market ¹	Lower bound	12.2	70.0	6.9	14.6	69.7	7.8
	Estimated value	15.3	73.7	9.7	16.9	72.3	9.9
	Upper bound	18.5	77.4	12.6	19.3	74.9	12.0

¹ EUR-11 = EUR-12 excluding Ireland.

Source: Eurostat.

Table CI S.1. Other services: single market's impact on your firm¹

Category	Confidence interval	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees			
		Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know
Harmonization of licensing/authorization requirements in EU	Lower bound	6.4	65.7	3.4	8.7	17.9	63.5	3.6	7.3
	Estimated value	10.5	69.9	7.2	12.4	20.0	65.8	5.2	8.9
	Upper bound	14.6	74.1	10.9	16.2	22.1	68.1	6.9	10.6
Recognition of licences/authorizations in other EU states	Lower bound	7.9	67.8	0.5	9.1	15.1	68.9	1.2	7.6
	Estimated value	11.7	71.9	3.8	12.6	17.0	71.1	2.7	9.2
	Upper bound	15.6	76.1	7.1	16.1	19.0	73.3	4.3	10.8
Measures to facilitate cross-border operations in other EU states	Lower bound	18.0	60.1	0.4	6.7	27.5	57.7	2.1	4.5
	Estimated value	21.9	64.6	3.2	10.4	29.7	60.0	3.9	6.3
	Upper bound	25.8	69.0	6.7	14.1	31.9	62.3	5.8	8.2
Measures to facilitate physical establishment in other EU states	Lower bound	5.9	73.9	2.3	9.7	14.6	71.7	0.0	7.1
	Estimated value	8.7	77.5	0.9	12.9	16.3	73.6	1.4	8.6
	Upper bound	11.6	81.0	4.1	16.1	18.0	75.6	2.9	10.1
The opening-up of public procurement	Lower bound	5.2	68.5	0.1	11.0	14.3	66.0	4.6	7.7
	Estimated value	9.0	72.4	3.8	14.8	16.2	68.2	6.3	9.4
	Upper bound	12.8	76.3	7.4	18.7	18.0	70.3	8.0	11.0
The liberalization of capital movements	Lower bound	12.3	68.1	1.9	7.0	22.5	63.8	0.0	6.5
	Estimated value	16.2	71.9	1.4	10.4	24.5	65.9	1.3	8.3
	Upper bound	20.2	75.7	4.8	13.8	26.4	68.1	3.1	10.0
Double-taxation agreements	Lower bound	7.0	65.0	1.9	13.9	15.5	64.2	0.0	13.0
	Estimated value	11.1	69.0	2.0	17.9	17.5	66.3	1.4	14.8
	Upper bound	15.1	73.1	5.8	22.0	19.4	68.5	3.2	16.6

¹ EUR-11 = EUR-12 excluding BR Deutschland.

Source: Eurostat.

Table CI S.2. Other services: single market's impact on your company's operation¹

Category	Confidence interval	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees			
		Positive impact	No impact	Negative impact	Don't know	Positive impact	No impact	Negative impact	Don't know
Sales to the domestic market	Lower bound	8.8	70.2	1.9	4.6	12.6	68.7	7.3	3.9
	Estimated value	12.5	74.3	5.2	7.9	14.4	70.9	9.1	5.6
	Upper bound	16.2	78.5	8.5	11.3	16.2	73.1	10.9	7.3
Sales to other EU countries	Lower bound	8.8	71.5	0.9	6.3	16.7	69.8	0.3	5.8
	Estimated value	12.3	75.6	2.3	9.7	18.7	72.1	1.9	7.3
	Upper bound	15.9	79.8	5.6	13.1	20.7	74.3	3.4	8.9
Sales to non-EU countries	Lower bound	1.7	79.5	1.4	6.4	5.4	82.2	0.0	6.1
	Estimated value	5.0	83.4	1.9	9.8	7.0	84.1	1.1	7.8
	Upper bound	8.2	87.2	5.1	13.2	8.6	86.1	2.7	9.4
Productivity	Lower bound	6.4	74.0	0.8	4.4	12.4	74.9	2.0	4.0
	Estimated value	10.1	78.0	4.2	7.8	14.1	76.8	3.6	5.6
	Upper bound	13.8	81.9	7.5	11.1	15.7	78.7	5.2	7.1
Profitability	Lower bound	8.1	70.5	2.9	3.1	12.4	68.5	7.9	3.8
	Estimated value	11.8	74.8	6.8	6.7	14.1	70.7	9.7	5.5
	Upper bound	15.4	79.0	10.6	10.3	15.9	72.9	11.5	7.1
Employment	Lower bound	4.8	73.3	2.8	3.8	9.1	74.2	6.1	3.6
	Estimated value	8.6	77.5	6.5	7.4	10.8	76.2	7.8	5.2
	Upper bound	12.4	81.7	10.3	11.0	12.5	78.3	9.4	6.8

¹ EUR-11 = EUR-12 excluding BR Deutschland.

Source: Eurostat.

Table CI S.3.a. Other services: single market's importance to development of strategy (sub table 1)¹

Category	Confidence interval	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees			
		Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know
More standardized products/services	Lower bound	3.7	10.3	28.7	40.6	6.1	15.5	37.5	32.3
	Estimated value	7.0	14.6	33.2	45.1	7.9	17.7	39.9	34.5
	Upper bound	10.4	18.9	37.8	49.7	9.7	19.9	42.3	36.8
More specialized products/services	Lower bound	4.4	10.0	29.6	39.1	7.9	16.4	35.0	32.2
	Estimated value	7.7	14.5	34.1	43.7	9.8	18.4	37.3	34.5
	Upper bound	11.1	19.0	38.6	48.2	11.6	20.5	39.7	36.7
Pricing	Lower bound	4.0	8.2	33.0	37.4	8.5	16.9	36.0	30.1
	Estimated value	7.7	12.6	37.7	42.1	10.3	19.0	38.3	32.4
	Upper bound	11.3	16.9	42.4	46.8	12.1	21.1	40.7	34.6
Development of new products/services	Lower bound	5.0	11.2	29.6	37.1	9.2	18.0	35.7	28.5
	Estimated value	8.4	15.3	34.5	41.7	11.0	20.0	38.1	30.8
	Upper bound	11.8	19.4	39.4	46.4	12.9	22.1	40.5	33.1
Efficiency in the provision of products/services	Lower bound	5.2	7.6	31.2	38.6	9.4	15.9	34.8	31.3
	Estimated value	8.9	11.9	35.9	43.3	11.3	18.0	37.2	33.5
	Upper bound	12.6	16.2	40.6	48.0	13.3	20.0	39.5	35.8
Increase in cross-border provision of services to other EU states	Lower bound	0.5	7.5	27.3	47.5	5.0	13.5	36.2	36.7
	Estimated value	4.2	11.5	32.1	52.3	6.8	15.6	38.6	39.0
	Upper bound	7.8	15.4	36.8	57.0	8.6	17.7	41.0	41.3
Establishment of operations in other EU states	Lower bound	0.9	5.3	26.9	50.7	3.6	11.6	37.6	38.9
	Estimated value	4.2	9.1	31.3	55.4	5.3	13.6	39.9	41.2
	Upper bound	7.5	12.9	35.7	60.2	7.0	15.6	42.2	43.5
Distribution networks in other EU markets	Lower bound	0.7	5.3	26.7	51.9	3.0	10.1	38.5	40.1
	Estimated value	2.9	9.2	31.4	56.6	4.7	12.1	40.8	42.4
	Upper bound	6.4	13.1	36.1	61.2	6.4	14.1	43.0	44.7
Advertising in other EU markets	Lower bound	0.5	5.2	31.7	47.0	1.1	6.9	44.9	38.7
	Estimated value	2.8	9.5	36.2	51.5	2.8	9.0	47.2	40.9
	Upper bound	6.0	13.8	40.7	56.1	4.5	11.1	49.5	43.2
Purchase of business services from other EU markets	Lower bound	0.5	5.8	29.0	49.0	1.2	11.4	44.5	34.4
	Estimated value	3.1	9.5	33.7	53.7	2.9	13.6	46.8	36.7
	Upper bound	6.7	13.3	38.4	58.4	4.7	15.8	49.1	39.0
Purchase of financial services from other EU markets	Lower bound	0.2	3.1	29.2	51.6	0.8	5.7	43.5	41.5
	Estimated value	3.1	7.0	33.7	56.2	2.5	7.9	45.8	43.8
	Upper bound	6.4	10.8	38.1	60.9	4.1	10.2	48.1	46.1

¹ EUR-11 = EUR-12 excluding BR Deutschland.

Source: Eurostat.

Table CI S.3.b. Other services: single market's importance to development of strategy (sub table 2)¹

Category	Confidence interval	Percentage of enterprises expressing opinion				Percentage of enterprises offering opinion expressed in number of salaried employees			
		Very important	Quite important	Not important	Don't know	Very important	Quite important	Not important	Don't know
(Direct) Investment in other companies	Lower bound	0.0	2.0	23.8	56.9	2.1	9.9	37.1	42.4
	Estimated value	4.0	6.1	28.4	61.5	3.9	12.0	39.4	44.8
	Upper bound	8.0	10.2	32.9	66.2	5.6	14.1	41.7	47.1
(Direct) Investment from other companies	Lower bound	0.6	2.7	22.6	59.0	0.9	5.9	37.8	47.1
	Estimated value	2.7	6.6	27.1	63.6	2.6	8.0	40.1	49.3
	Upper bound	5.9	10.5	31.7	68.3	4.2	10.1	42.4	51.6
Co-operation agreements with other companies	Lower bound	0.9	4.4	19.3	59.2	4.0	11.7	31.9	44.0
	Estimated value	4.2	8.2	23.8	63.8	5.8	13.8	34.1	46.3
	Upper bound	7.4	11.9	28.3	68.4	7.6	15.8	36.4	48.6

¹ EUR-11 = EUR-12 excluding BR Deutschland.

Source: Eurostat.

Table CI S.4. Other services: any change in competition in the domestic market¹

Category	Confidence interval	Percentage of enterprises expressing opinion			Percentage of enterprises offering opinion expressed in number of salaried employees		
		Increase	No change	Decrease	Increase	No change	Decrease
Competitors: domestically owned enterprises	Lower bound	25.4	58.5	3.0	32.6	55.4	5.5
	Estimated value	30.0	63.1	6.9	34.9	57.8	7.4
	Upper bound	34.6	67.7	10.8	37.1	60.1	9.3
Competitors: other EU-owned enterprises	Lower bound	17.2	73.2	0.0	34.7	59.3	0.0
	Estimated value	21.0	77.0	2.1	36.9	61.5	1.6
	Upper bound	24.7	80.8	5.6	39.1	63.7	3.6
Competitors: non-EU-owned enterprises	Lower bound	5.9	84.9	0.0	14.5	80.1	0.0
	Estimated value	9.3	88.3	2.4	16.3	82.0	1.7
	Upper bound	12.7	91.8	5.7	18.1	83.8	3.5
Price competition: domestically owned enterprises	Lower bound	32.9	55.5	0.0	45.4	46.6	1.1
	Estimated value	37.4	60.0	2.6	47.7	49.0	3.2
	Upper bound	41.9	64.6	6.9	50.1	51.4	5.4
Price competition: other EU-owned enterprises	Lower bound	13.1	77.8	0.0	30.9	62.3	0.6
	Estimated value	16.3	81.0	2.7	33.0	64.5	2.5
	Upper bound	19.4	84.2	5.5	35.2	66.6	4.4
Price competition: non-EU-owned firms	Lower bound	6.4	84.2	0.9	15.6	78.5	0.7
	Estimated value	9.3	87.2	3.5	17.4	80.3	2.3
	Upper bound	12.2	90.3	6.0	19.2	82.2	3.9
Quality competition: domestically owned enterprises	Lower bound	22.6	64.7	0.5	35.7	55.6	2.1
	Estimated value	26.8	69.0	4.1	38.0	58.0	4.0
	Upper bound	31.1	73.4	7.8	40.4	60.3	6.0
Quality competition: other EU-owned enterprises	Lower bound	10.8	78.9	0.0	26.6	67.0	0.2
	Estimated value	14.4	82.5	3.1	28.6	69.2	2.2
	Upper bound	17.9	86.2	6.4	30.7	71.3	4.2
Quality competition: non-EU-owned enterprises	Lower bound	4.7	85.6	0.	12.5	81.8	0.6
	Estimated value	8.0	89.1	2.9	14.2	83.6	2.2
	Upper bound	11.3	92.5	6.1	15.9	85.3	3.8

¹ EUR-11 = EUR-12 excluding BR Deutschland.

Source: Eurostat.

Table CI S.5. Other services: single market legislation as it affects your own firm or sector¹

Category	Confidence interval	Percentage of enterprises expressing opinion			Percentage of enterprises offering opinion expressed in number of salaried employees		
		Increase	No change	Decrease	Increase	No change	Decrease
The single market programme has been a success for your firm	Lower bound	12.0	58.3	17.1	22.6	51.3	19.4
	Estimated value	15.9	62.7	21.4	24.8	53.7	21.5
	Upper bound	19.8	67.2	25.6	26.9	56.1	23.6
The SM has been a success for your sector in your country	Lower bound	12.6	57.4	17.4	22.8	48.2	22.4
	Estimated value	16.4	61.9	21.8	24.8	50.6	24.6
	Upper bound	20.1	66.3	26.1	26.9	52.9	26.7
The SM has been a success for your sector in the EU	Lower bound	11.1	66.4	10.2	22.2	55.6	15.7
	Estimated value	14.9	70.9	14.2	24.3	57.9	17.8
	Upper bound	18.7	75.4	18.2	26.3	60.3	19.8
The SM has been successful in eliminating obstacles to EU trade	Lower bound	17.7	60.3	9.5	26.5	50.5	16.5
	Estimated value	21.8	64.9	13.3	28.6	52.9	18.6
	Upper bound	25.9	69.4	17.2	30.7	55.3	20.6
The SM has been successful in creating a genuine single market ²	Lower bound	2.9	62.2	21.8	11.1	51.5	30.1
	Estimated value	6.3	66.3	25.9	12.9	53.9	32.4
	Upper bound	9.8	70.5	30.0	14.8	56.2	34.7
Additional measures are needed to eliminate obstacles to EU trade	Lower bound	14.5	70.7	2.9	25.0	61.2	7.6
	Estimated value	18.5	74.9	6.6	27.2	63.5	9.4
	Upper bound	22.4	79.1	10.3	29.3	65.8	11.2
Additional measures are needed in this sector to create a genuine single market ²	Lower bound	13.0	70.4	3.6	22.5	62.3	8.5
	Estimated value	16.8	74.6	7.2	24.5	64.6	10.2
	Upper bound	20.7	78.8	10.7	26.4	66.8	11.9

¹ EUR-11 = EUR-12 excluding BR Deutschland.² EUR-10 = EUR-12 excluding BR Deutschland and Ireland.

Source: Eurostat.

8.4. Definition of opinion effect and structure effect

8.4.1. Definition

The statistics already produced include tables: for each question, estimates of the answers at the EU level, broken down separately by Member State, sector and size of enterprise. However, the aggregated results at the country level, for instance, are perhaps not sufficient to estimate a 'country specificity' *vis-à-vis* the EU only by comparing the percentages of opinions in this country. This is due to a possible difference in the structure of the enterprises' population by size class and/or by sector of activity when compared with the European structure. (For instance, southern countries may have more SMEs than the EU average, and since smaller enterprises tend to be less favourable, this could indirectly lower the percentages of favourable opinions for these countries.)

We calculate hereafter some indicators to take this into account. The principle is very easy to understand, but the formulae are relatively difficult to read.

Estimation of (country) structure effects. Firstly, we re-weight the percentages of opinions for each elementary cell (sector size class) of a given country A using EUR-12 structure. By dividing these figures by the corresponding percentages at the country level, we get an index of the divergence only due to the difference of structure between country A and EUR-12.

Estimation of (country) opinion effects. Firstly, we re-weight the percentages of opinions for each elementary cell: we obtain the opinions of country A projected on the structure of Europe. By dividing these figures by the corresponding percentages at the European level, we get an index of the divergence only due to the divergence of opinions between country A and EUR-12.

The same definitions apply to size class or to the sector of activity structure effect and opinion effect instead of the country structure effect and opinion effect.

8.4.2. Mathematical formulation

The global percentage of the opinion α in country A is:

$$P(A, \text{opinion}=\alpha) = \frac{\sum_{i,j,k} \text{WEIGHT}(A, i, j, k) * \text{Ind}(\text{opinion}(A, i, j, k)=\alpha)}{\sum_{i,j,k} \text{WEIGHT}(A, i, j, k)}$$

where i represents the sector, j the size class, k the enterprise and * denotes the product.

If $P(A, i, j, \text{opinion}=\alpha)$ is the observed proportion for sector i and size class j in country A

we have obviously:

$$P(A, \text{opinion}=\alpha) = \frac{\sum_{i,j} W(A, i, j) * P(A, i, j, \text{opinion}=\alpha)}{\sum_{i,j} W(A, i, j)}$$

where $W(A, i, j)$ is the total weight of (A, i, j) , i.e. $\sum_k \text{WEIGHT}(A, i, j, k)$

If we denote $w(A, i, j) = W(A, i, j) / \sum_{i,j} W(A, i, j)$

then

$$P(A, \text{opinion}=\alpha) = \sum_{i,j} w(A, i, j) * P(A, i, j, \text{opinion}=\alpha) \\ = \sum_{i,j} w(\text{EUR-12}, i, j) * P(A, i, j, \text{op}=\alpha) * \{ \sum_{i,j} w(A, i, j) * P(A, i, j, \text{op}=\alpha) / \sum_{i,j} w(\text{EUR-12}, i, j) * P(A, i, j, \text{op}=\alpha) \}$$

So,	$P(A, \text{op}=\alpha) / P(\text{EUR-12}, \text{op}=\alpha) = \text{OE}(A, \text{op}=\alpha) * \text{SE}(A, \text{op}=\alpha) = \text{I}(A, \text{op}=\alpha)$
-----	---

where the ‘country opinion effect’ OE is defined by:

$$\text{OE}(A, \text{op}=\alpha) = \sum_{i,j} w(\text{EUR-12}, i, j) * P(A, i, j, \text{op}=\alpha) / \sum_{i,j} w(\text{EUR-12}, i, j) * P(\text{EUR-12}, i, j, \text{op}=\alpha)$$

and the ‘country structure effect’ SE is defined by:

$$\text{SE}(A, \text{op}=\alpha) = \sum_{i,j} w(A, i, j) * P(A, i, j, \text{op}=\alpha) / \sum_{i,j} w(\text{EUR-12}, i, j) * P(A, i, j, \text{op}=\alpha)$$

$\text{I}(A, \text{op}=\alpha) = P(A, \text{op}=\alpha) / P(\text{EUR-12}, \text{op}=\alpha)$ is called the **index**.

Similar definitions and relations hold for sector (respectively size class) opinion effects and for sector (resp. size class) structure effects.

For instance, the sector opinion effect for a given sector S is given by:

$$\text{OE}(S, \text{op}=\alpha) = \sum_{a,j} w(a, S, j) * P(a, S, j, \text{op}=\alpha) / \sum_{a,j} w(a, S, j) * P(a, S, j, \text{op}=\alpha)$$

where a and j denote respectively the country and the size class and where

$$w(a, S, j) = \sum_k \text{WEIGHT}(a, S, j, k) / \sum_{a,j,k} \text{WEIGHT}(a, S, j, k)$$

9. General information about businesses in Europe

We include hereafter a summary of the tables used for the weighting of the survey sample. For additional information, see the publication issued by Eurostat: 'Enterprises in Europe – 4th report'.

Please note the relatively high importance of the UK in the 'Other Services' sector (Table 9.4), expressed in terms of number of enterprises. The UK firms with 5 employees or more amount to about 40% of such enterprises for EUR-11 (EUR-12 excluding Germany). This level is partly due to higher concentration of the service industry in the UK.

Table 9.1. Structure of European manufacturing sector¹ by Member State, sector and size class (1992)

Classification	Number of enterprises (in thousands)	Enterprise breakdown (in %)	Number of salaried employees (in thousands)	Salaried employees breakdown (in %)	Turnover (in thousand million ECU)	Turnover breakdown (in %)
EUR-12	178	100.0	21,354	100.0	2,790	100.0
<i>By Member State</i>						
België/Belgique	4	2.2	628	2.9	97	3.5
Danmark	2	1.1	316	1.5	40	1.4
BR Deutschland	35	19.7	6,471	30.3	860	30.8
Elláda	2	1.1	249	1.2	15	0.5
España	19	10.7	1,655	7.8	208	7.5
France	28	15.7	3,587	16.8	500	17.9
Ireland	1	0.6	169	0.8	16	0.6
Italia	38	21.3	2,942	13.8	396	14.2
Luxembourg	0.1	0.1	33	0.2	5	0.2
Nederland	6	3.4	717	3.4	103	3.7
Portugal	10	5.6	827	3.9	38	1.4
United Kingdom	28	15.7	3,756	17.6	507	18.2
<i>By Manufacturing Sector</i>						
Food, beverages and tobacco	19	10.7	2,422	11.3	491	17.6
Textiles, leather and furniture	40	22.5	2,950	13.8	209	7.5
Wood, paper and printing/publishing	22	12.4	1,883	8.8	237	8.5
Chemicals, rubber and plastics	16	9.0	2,651	12.4	451	16.2
Non-metallic mineral products	9	5.1	963	4.5	103	3.7
Metals and metal products	29	16.3	2,756	12.9	324	11.6
Machinery and equipment NEC	19	10.7	2,400	11.2	254	9.1
Electrical and optical machinery	15	8.4	2,862	13.4	340	12.2
Transport equipment	7	3.9	2,463	11.5	377	13.5
<i>By Employment Size Class</i>						
20-49	105	59.0	3,245	15.2	287	10.3
50-99	35	19.7	2,400	11.2	272	9.7
100-249	24	13.5	3,713	17.4	445	15.9
250-499	8	4.5	2,712	12.7	343	12.3
500-1,999	4	2.2	3,877	18.2	612	21.9
≥ 2,000	1	0.6	5,404	25.3	829	29.7

¹ Enterprises with 20 or more employees.

Source: Eurostat.

Table 9.2. Structure of European construction sector¹ by Member State and size class (1992)

Classification	Number of enterprises (in thousands)	Enterprise breakdown (in %)	Number of salaried employees (in thousands)	Salaried employees breakdown (in %)	Turnover (in thousand million ECU)	Turnover breakdown (in %)
EUR-11	50.4	100.0	3,302	100.0	320	100.0
<i>By Member State</i>						
België/Belgique	1.7	3.4	106	3.2	8	2.5
Danmark	0.9	1.8	65	2.0	6	1.9
BR Deutschland	10.3	20.4	754	22.8	74	23.1
España	8.2	16.3	506	15.3	41	12.8
France	10.7	21.2	743	22.5	62	19.4
Ireland	0.2	0.4	15	0.5	2	0.6
Italia	7.5	14.9	369	11.2	34	10.6
Luxembourg	0.2	0.4	15	0.5	1	0.3
Nederland	3.0	6.0	163	4.9	18	5.6
Portugal	1.9	3.8	142	4.3	6	1.9
United Kingdom	5.2	10.3	420	12.7	62	19.4
<i>By Employment Size Class</i>						
20-49	26.5	52.6	1,095	33.2	82	25.6
50-99	8.7	17.3	594	18.0	53	16.6
100-249	3.6	7.1	544	16.5	56	17.5
250-499	0.8	1.6	300	9.1	35	10.9
500-1,999	0.5	1	510	15.4	63	19.7
≥ 2,000	0.1	0.2	257	7.8	28	8.8

¹ Enterprises with 20 or more employees.² EUR-11= EUR-12 excluding Elláda.

Source: Eurostat.

Table 9.3. Structure of European distributive trade sector¹ by Member State, sector and size class (1992)²

Classification	Number of enterprises (in thousands)	Enterprise breakdown (in %)	Number of salaried employees (in thousands)	Salaried employees breakdown (in %)
EUR-12	507	100.0	12,143	100.0
<i>By Member State</i>				
België/Belgique	15	2.6	n/a	n/a
Danmark	8	1.4	n/a	n/a
BR Deutschland	99	17.4	n/a	n/a
Elláda	7	1.2	n/a	n/a
España	56	9.8	n/a	n/a
France	74	13.0	n/a	n/a
Ireland	6	1.1	n/a	n/a
Italia	69	12.1	n/a	n/a
Luxembourg	1	0.2	n/a	n/a
Nederland	25	4.4	n/a	n/a
Portugal	23	4.0	n/a	n/a
United Kingdom	119	20.9	n/a	n/a
<i>By Services Sector</i>				
Wholesaling and motor vehicles	222	38.9	5,305	43.7
Retail trade	284	61.1	6,837	56.3
<i>By Employment Size Class</i>				
20-49	480	84.2	5,419	44.6
50-199	21	3.7	1,936	15.9
200-499	3	0.5	1,006	8.3
500-999	1	0.2	1,680	13.8
≥ 1,000	1	0.2	2,100	17.3

¹ Enterprises with 5 or more employees.

² Number of salaried employees has been estimated at the European level only.

Source: Eurostat.

Table 9.4. Structure of European other services¹ by Member State, sector and size class (1992)²

Classification	Number of enterprises (in thousands)	Enterprise breakdown (in %)	Number of salaried employees (in thousands)	Salaried employees breakdown (in %)
EUR-11	385	100.0	16,307	100.0
By Member State				
België/Belgique	13	3.3	n/a	n/a
Danmark	6	1.6	n/a	n/a
Elláda	4	1.0	n/a	n/a
España	48	12.5	n/a	n/a
France	53	13.8	n/a	n/a
Ireland	5	1.3	n/a	n/a
Italia	55	14.3	n/a	n/a
Luxembourg	1	0.3	n/a	n/a
Nederland	29	7.5	n/a	n/a
Portugal	13	3.4	n/a	n/a
United Kingdom	154	40.0	n/a	n/a
By Services Sector				
Hotels and restaurants	127	33.0	2,353	14.4
Transport, storage and communication	70	18.2	5,016	30.8
Financial intermediation	22	5.7	2,864	17.6
Property and business activities	165	42.9	6,073	37.2
By Employment Size Class				
20-49	353	91.7	3,973	24.4
50-199	22	5.7	2,171	13.3
200-499	5	1.3	1,672	10.3
500-999	1	0.3	4,274	26.2
≥ 1,000	1	0.3	4,215	25.8

¹ Enterprises with 5 or more employees.² EUR-11 = EUR-12 excluding BR Deutschland. Number of salaried employees has been estimated at the European level only.

Source: Eurostat.

10. How to get more information

If you wish to know more about the methodology used or to obtain more data, please call:

Luxembourg	Eurostat Data Shop	tel. +352 43 35 22 51
		fax +352 43 35 22 221

Brussels	Eurostat Data Shop	tel. +32 2 299 66 66
		fax.+32 2 295 01 25

The Single Market Review

Results of the business survey

This report has been written as part of a major review of the Single Market undertaken by the European Commission. The 1996 Single Market Review assesses the progress made in implementing the Single Market Programme since 1992, through a series of 39 separate reports on specific business sectors or single market issues. This research amounts to the first extensive analysis of what has been happening to the European economy as a result of the Single Market Programme.

Written by leading subject experts under the coordination of the Directorates-General 'Internal Market and Financial Services' (DG XV) and 'Economic and Financial Affairs' (DG II) of the European Commission, this Review provides essential information to all those worldwide who are interested or involved in the development of the Single Market. It also gives invaluable insight into specific industry sectors for investors, analysts and corporate strategists.

For a complete picture of the Single Market Review, see also:

- SUBSERIES**
- I** **IMPACT ON MANUFACTURING (8 VOLUMES)**
 - II** **IMPACT ON SERVICES (11 VOLUMES)**
 - III** **DISMANTLING OF BARRIERS (6 VOLUMES)**
 - IV** **IMPACT ON TRADE AND INVESTMENT (4 VOLUMES)**
 - V** **IMPACT ON COMPETITION AND SCALE EFFECTS (4 VOLUMES)**
 - VI** **AGGREGATE AND REGIONAL IMPACT (5 VOLUMES)**

£45 (Stg.) ECU 54 (prices excluding VAT)



Office for Official Publications of the
European Communities
L-2985 Luxembourg
ISBN 92-827-8811-3
Catalogue number: C1-99-96-996-EN-C

Kogan Page Earthscan
Kogan Page, 120 Pentonville Road, London N1 9JN

