C O N F I D E N T I E L

E O S   G A L L U P   E U R O P E
FLASH EUROBAROMETRE N° 136 „E-commerce (2)" – Novembre 2002
Version française 24.10.02

C O N F I D E N T I A L

E O S   G A L L U P   E U R O P E
FLASH EUROBAROMETER N° 136 „E-commerce (2)" – November 2002
English version 24.10.02   **page 1/6**

CONFIDENTIEL

CONFIDENTIAL

INFORMATIONS A PREPARER AVANT L' INTERVIEW :

 (b) REGION (N.U.T.S):   (code selon la ville, dans FICHIER D&B)

(c) CODE SIC ou NACE :   (dans FICHIER D&B)

(d) NOMBRE D'EMPLOYES :   (dans FICHIER D&B)

INFORMATION TO PREPARE BEFORE THE INTERVIEW :

 (b) NUTS REGION: (Code according to the town,

                                              FOUND IN D&B FILE)

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

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

INTRODUCTION (PRESENTATION A ADAPTER SELON CHAQUE INSTITUT)

-       Nous effectuons une étude pour la Commission européenne portant sur les activités commerciales sur Internet (E-commerce) dans l'Union européenne.
-       La personne interviewée doit être un cadre supérieur de l'entreprise.

INTRODUCTION (TO BE ADAPTED BY EACH INSTITUTE)

-       Survey carried out for the European Commission, relating to trading activities in the European Union held through the Internet (E-commerce).
-       The person interviewed should be a senior manager of the company.

A. ELEMENTS DESCRIPTIFS

A.   Quelles sont votre titre et vos responsabilités dans l'entreprise ?

   [PRECISEZ]
   …………………………………………

   [ENSUITE EN CODEZ LES RESPONSABILITES PRINCIPALES CI- DESSOUS- UN SEUL CODE:]

-       Direction générale : Président, directeur général, propriétaire, patron 1
-       Directeur financier.. 2
-       Directeur en charge du département informatique (dans l'entreprise) 3
-       [**autre**] ....**[STOP INTERVIEW**]

B.   Combien de personnes sont employées régulièrement dans votre entreprise en [**NOTRE PAYS]**?

   N= [ ] [ ] [ ] [ ] [ ]

   [SI MOINS DE 10 PERSONNES EMPLOYEES : → STOP INTERVIEW]
   [SI NSP/SR→STOP INTERVIEW]

A. DESCRIPTIVE ELEMENTS

A.   What is your position and responsibility in the company?

   [SPECIFY]
   ....

   [THEN CODE THE MAIN RESPONSIBILITIES BELOW - ONE CODE ONLY :]

-       General management : chairman, Managing director, owner, boss 1
-       Financial Director... 2
-       Director in charge of IT in the company 3
-       [Other]...**[STOP INTERVIEW]**

B.   How many persons are in regular employment within your company in [OUR COUNTRY]?

   N= [ ] [ ] [ ] [ ] [ ]

   [IF LESS THAN 10 PEOPLE EMPLOYED: → STOP INTERVIEW]
   [IF DK/NA → STOP INTERVIEW]

C.   Votre entreprise est-elle principalement une entreprise : ...?

**[LIRE - SI NECESSAIRE , DEMANDEZ DE PRECISER COMME INDIQUE CI –
DESSOUS : ex :.....]**
- **[UNE SEULE RÉPONSE POSSIBLE ; SI NECESSAIRE , DEMANDEZ AU**
- **REPONDANT DE PRECISER LES ACTIVITES QUI CARACTERISENT LE MIEUX**
- **SON ENTREPRISE]**

    - **de construction ou de travaux publics** 20
    -**de production et de fabrication de biens**
            ex : produits intermédiaires ou 21
                 produits finis 22
    - **de commerce et de distribution**
            ex :en gros ou 31
                 au détail 32
    -de **Transports** 41
    -du secteur des **Hôtels, Restaurants, Cafés** 42
    -**de services**
    ex : financiers 43
            services aux entreprises 44
            services aux personnes 45

    [SI AUCUN DES CES SECTEURS , STOP INTERVIEW]

D.   Quel a été votre chiffre d'affaires annuel en **[NOTRE PAYS],** l'an dernier ?

    [PRECISEZ]
    …………………………………………

    [ENSUITE CODEZ LE CHIFFRE D'AFFAIRES]

    -    moins de 100.000 euros 1
    -    entre + de 100.000 et 250.000 euros 2
    -    entre +250.000 et 500.000 euros 3
    -    entre +500.000 et 1.000.000 euros 4
    -    entre +1 et 2 millions d'euros 5
    -    entre +2 et 7 millions d'euros 6
    -    entre +7 et 20 millions d'euros 7
    -    entre +20 et 40 millions d'euros 8
    -    entre +40 et 80 millions d'euros 9
    -    entre +80 et 150 millions d'euros 10
    -    plus de 150 millions d'euros 11
    -    (NSP/SR 12

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

    **[READ OUT] [WHEN NEEDED, ASK TO SPECIFY AS INDICATED BELOW :
     i.e.: ...]**
    **[ONE ANSWER ONLY ; IF NEEDED ASK THE RESPONDENT TO SELECT THE
    MOST CHARACTERISTIC OF THE CY'S ACTIVITIES]**

    - Construction 20
    - **Manufacturing**
            -> i.e :   intermediate goods or 21
                        finished goods 22
    - **Trade**
            -> i.e: wholesale or 31
                        retail... 32
    - **Transport**.. 41
    - **Hotels, Restaurants and Catering** 42
    - **Services**
            -> i.e.:   financial or 43
            business or 44
            personal services... 45
    [IF NONE OF THESE : STOP INTERVIEW]

D.   What was the annual turnover of your company in **[OUR COUNTRY]** , last year: …?

    [SPECIFY]
    ....

    [THEN CODE THE TURNOVER]

    -         less than 100.000 euro **(*)** 1
    -         between +100.000 and 250.000 euro **(*)**... 2
    -         between +250.000 and 500.000 euro **(*)**... 3
    -         between +500.000 and 1.000.000 euro **(*)**.. 4
    -         between +1 and 2 million euro **(*)** 5
    -         between +2 and 7 million euro **(*)** 6
    -         between +7 and 20 million euro **(*)** 7
    -         between +20 and 40 million euro **(*)** 8
    -         between +40 and 80 million euro **(*)** 9
    -         between +80 and 150 million euro **(*)** 10
    -         above 150 million euro **(*)** 11
    -         (DK/NA) 12

C O N F I D E N T I E L

E O S   G A L L U P   E U R O P E
FLASH EUROBAROMETRE N° 136 „E-commerce (2)" – Novembre 2002
Version française 24.10.02

C O N F I D E N T I A L

E O S   G A L L U P   E U R O P E
FLASH EUROBAROMETER N° 136 „E-commerce (2)" – November 2002
English version 24.10.02   **page 3/6**

B. VOTRE ENTREPRISE ET INTERNET

Commençons par l'Internet dans votre entreprise.
1.   Votre entreprise est-elle connectée à Internet ?

- Oui...1
- Non.. 2 **[ALLER FIN – INTERVIEW VALIDE]**
- (NSP/SR) ....3 **[STOP INTERVIEW - INTERVIEW NON VALIDE]**

2.   Quel(s) type(s) de connections Internet votre entreprise a-t-elle?

   [LIRE – PLUSIEURS REPONSES POSSIBLES]
- Bande étroite, par exemple ligne téléphonique, RNIS/ISDN...............1
- Bande large (ADSL, câble de télévision, ligne louée) 1
- Mobile 1
- (NSP/SR) 1
                                   - NOUVELLE –

3.   Votre entreprise a-t-elle un site sur Internet ?

- Oui...1
- Non.. 2 **[GO TO Q.5]**
- (NSP/SR) .... 3 **[GO TO Q.5]**

C. VENTES SUR INTERNET

4.   Votre site Internet peut-il être utilisé pour passer des commandes ?

- Oui 1
- Non 2
- (NSP/SR) 3

5.   Votre entreprise vend-elle des produits ou des services par l'intermédiaire de sites de marchés électroniques ***** ?

- Oui 1
- Non 2
- (NSP/SR) 3

* les sites de marchés électroniques sur Internet permettent à de multiples acheteurs et vendeurs de procéder simultanément à des transactions commerciales sur Internet. Ces sites se présentent sous plusieurs formes, comme par exemple des catalogues, des ventes publiques ou des échanges. Certains sont créés par des vendeurs, d'autres par des acheteurs, ou d'autres encore par des tiers. Un exemple bien connu est http://www.covisint.com/ pour l'industrie automobile.

B. YOUR COMPANY AND THE INTERNET

Let's start with the Internet in your company

1.   Does your company have an Internet connection?

- Yes...1
- No .... **2[GO TO END – VALID INTERVIEW]**
- (DK/NA) ....3 **[STOP INTERVIEW – NOT VALID INTERVIEW]**

2.   What kind of Internet connection does your company have?

   [READ OUT - MULTIPLE ANSWERS POSSIBLE]
- Narrowband, for example dial-up, ISDN 1
- Broadband (ADSL, TV cable, leased line)..1
- Mobile 1
- (DK/NA) 1
                                   - NEW –

3.   Does your company have a web site?

- Yes...1
- No .... 2 **[GO TO Q.5]**
- (DK/NA) .... 3**[GO TO Q.5]**

C. SALES ON INTERNET

4.   Can your company's web site be used to make orders?

- Yes...1
- No 2
- (DK/NA) 3

5.   Does your company sell its products/services through electronic market places *?

- Yes...1
- No 2
- (DK/NA) 3

* **electronic market places** are Internet sites using software that allows multiple buyers and sellers to carry out simultaneously commerce transactions over the Internet. These sites take a number of forms, such as catalogues, auctions or exchanges. Some are set up by sellers, others by buyers and still others by third parties. A well-known example is http://www.covisint.com/ for the automotive industry.

E O S   G A L L U P   E U R O P E
FLASH EUROBAROMETRE N° 136   „E-commerce (2)"   –   Novembre 2002
Version française 24.10.02

E O S   G A L L U P   E U R O P E
FLASH EUROBAROMETER N° 136 „E-commerce (2)"   –   November 2002
English version 24.10.02   **page 4/6**

6.   Quel pourcentage du total de vos ventes est réalisé actuellement sur Internet ?

   [INSISTEZ POUR OBTENIR UNE ESTIMATION]

   [ ] [ ] [ ] %

   [CODE 999- SI NSP/SR SEULEMENT APRES AVOIR INSISTE]
   [CODE 000- SI PAS DE VENTES REALISEES SUR INTERNET]

6.   What percentage of your total sales is currently made on the internet?

   [INSIST TO OBTAIN AN ESTIMATE]

   [ ] [ ] [ ] %

   [CODE 999 – IF DK/NA ONLY AFTER INSISTING]
   [CODE 000 – IF "NO SALES MADE ON THE INTERNET"]

D. ACHATS SUR INTERNET

D. PURCHASES ON INTERNET

7.   Votre entreprise achète-t-elle une partie ou la totalité de ses fournitures (marchandises ou services) sur Internet ?

   -        Oui 1
   -        Non 2
   -        [NSP/SR]...3

7.   Does your company purchase some or all of its supplies (goods or services) online via the Internet?

   -        Yes... 1
   -         No 2
   -        [DK/NA]... 3

8.   Votre entreprise achète-t-elle une partie ou la totalité de ses fournitures par le biais des sites de marchés électroniques *?

   -        Oui 1
   -        Non 2
   -        [NSP/SR]...3

8.   Does your company purchase some or all of its supplies (products/services) through electronic market places * ?

   -        Yes... 1
   -         No 2
   -        [DK/NA]... 3

---

* les sites de marchés électroniques sur Internet permettent à de multiples acheteurs et vendeurs de procéder simultanément à des transactions commerciales sur Internet. Ces sites se présentent sous plusieurs formes, comme par exemple des catalogues, des ventes publiques ou des échanges. Certains sont créés par des vendeurs, d'autres par des acheteurs, ou d'autres encore par des tiers. Un exemple bien connu est http://www.covisint.com/ pour l'industrie automobile.

*   **electronic market places** are Internet sites using software that allows multiple buyers and sellers to carry out simultaneously commerce transactions over the Internet. These sites take a number of forms, such as catalogues, auctions or exchanges. Some are set up by sellers, others by buyers and still others by third parties. A well-known example is http://www.covisint.com/ for the automotive industry..

C O N F I D E N T I E L

E O S   G A L L U P   E U R O P E
FLASH EUROBAROMETRE N° 136 „E-commerce (2)" – Novembre 2002
Version française 24.10.02

C O N F I D E N T I A L

E O S   G A L L U P   E U R O P E
FLASH EUROBAROMETER N° 136 „E-commerce (2)" – November 2002
English version 24.10.02   **page 5/6**

9.   Quel est le pourcentage du total de vos fournitures achetées actuellement sur Internet ?

        [INSISTEZ POUR OBTENIR UNE ESTIMATION]

        [ ] [ ] [ ] %

        [CODE 999- SI NSP/SR SEULEMENT APRES AVOIR INSISTE]
        [CODE 000- SI PAS D'ACHATS REALISEES SUR INTERNET]

9.   What percentage of your total supplies is currently purchased on the Internet?

        [INSIST TO OBTAIN AN ESTIMATE]

        [ ] [ ] [ ] %

        [CODE 999 – IF DK/NA ONLY AFTER INSISTING]
        [CODE 000 – IF "NO PURCHASES MADE ON THE INTERNET"]

E. LES QUESTIONS DE SECURITE

Venons-en aux questions de sécurité concernant les ventes ou achats électroniques.

10.   Durant les six derniers mois, avez-vous été confronté aux problèmes de sécurité suivants : ?

        [LIRE –PLUSIEURS REPONSES POSSIBLES]

        -       Virus 1
        -       Accès illégal 1
        -       Refus de service…... 1
        -       Dégradation du serveur Internet 1
        -       Vol/Usurpation d'identité électronique 1
        -       Occupation du nom de domaine 1
        -       [AUTRE/PRECISEZ]… 1
        -       [Aucun] 1
        -       [NSP/SR] 1

E. THE SECURITY ISSUES

Turning now to security issues in relation to electronic sales and purchases

10.   In the last six months, have you experienced any of the following security problems:?

        [READ OUT- MULTIPLE ANSWERS POSSIBLE]

        –   Viruses 1
        –   Illegal access 1
        –   Denial of service 1
        –   Defacement of web server 1
        –   ID misrepresentation/theft 1
        –   Occupation of domain name 1
        –   [Other] [SPECIFY] 1
        –   [None] 1
        –   [DK/NA] 1

C O N F I D E N T I E L

E O S G A L L U P E U R O P E
FLASH EUROBAROMETRE N° 136 „E-commerce (2)" – Novembre 2002
Version française 24.10.02

11.   Parmi les mesures suivantes, lesquelles avez– vous prises pour vous protéger contre les problèmes de sécurité ?

>   **[LIRE –PLUSIEURS REPONSES POSSIBLES]**

>   a   Firewall...1
>   b   virus scanner………...1
>   c   detection d'intrusion**..1
>   d   Serveur SSL*** 1
>   e   (AUTRE/PRECISEZ) 1
>   f   [Ne connait pas le détail des mesures de sécurité]............................1

12.   Protégez-vous vos clients à l'aide…

>   **[LIRE –PLUSIEURS REPONSES POSSIBLES]**

>   a   D'un engagement sur la protection des données................................1
>   b   D'un programme de label de confiance..1
>   c   D'un accès à un mécanisme de résolution des conflits 1
>   d   De technologies pour assurer la confidentialité des données
>   des clients 1
>   e   [AUTRE/PRECISEZ]...1
>   f   [RIEN] 1
>   g   [NSP/SR]...1

- NOUVELLE –

[REMERCIER LE REPONDANT]

[FIN DE L'INTERVIEW]

** **Détection d'intrusion** : un système de détection d'intrusion analyse le trafic sur le réseau afin de détecter les attaques. Il examine les données afin d'identifier les risques posés par des utilisateurs non-autorisés, des attaques et des pirates informatiques ayant contourné le système de contrôle afin d'accéder aux données.

*** **SSL** : protocole d'authentification identification (intégré dans le navigateur Internet) entre le terminal et le serveur. Dans le navigateur,   les connections SSL sont symbolisées par un verrou au bas de l'écran.

C O N F I D E N T I A L

E O S G A L L U P E U R O P E
FLASH EUROBAROMETER N° 136 „E-commerce (2)" – November 2002
English version 24.10.02   **page 6/6**

11.   Which of the following measures have you taken to protect against security problems ?

>   **[READ OUT- MULTIPLE ANSWERS POSSIBLE]**

>   a.   Firewall 1
>   b.   Virus scanner……..1
>   c.   Intrusion detection ** 1
>   d.   SSL server site *** 1
>   e.   [Other]**[SPECIFY]** 1
>   f.   **[Don't know details of security measures]**...................................1

12.   Do you protect your customers by way of…

>   **[READ OUT- MULTIPLE ANSWERS POSSIBLE]**

>   a.   A data protection guarantee 1
>   b.   A trust mark programme...1
>   c.   Access to a mechanism for conflict resolution 1
>   d.   Technologies to ensure confidentiality of customer data.................1
>   e.   [Other][SPECIFY] 1
>   f.   [NOTHING] 1
>   g.   [DK/NA] 1

- NEW –

[THANK RESPONDENT]

[END INTERVIEW]

** **Intrusion detection**: Network intrusion detection systems (NIDS) analyze network traffic for attacks. They examine data to identify threats from non-authorized users, back-door attacks and hackers who have circumvented the control systems to access data.

*** **SSL**: an authentication protocol (built into the web browser) between the terminal and the server. In the browsers, SSL-connections are symbolized by a closed lock at the bottom of the screen.

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+-----------------------------------------------------------+
¦                                                           ¦
¦         FLASH EUROBAROMETER 136 (SPECIAL TARGETS)         ¦
¦                     « E-COMMERCE »                        ¦
¦         -----------------------------------------         ¦
¦                  2002, November-December                  ¦
¦                                                           ¦
¦              Survey managed and organised by :            ¦
¦      the European Commission - DG Press & Communication   ¦
¦                        (Unit B/1)                         ¦
¦                                                           ¦
¦              Conducted by EOS GALLUP EUROPE               ¦
¦                                                           ¦
+-----------------------------------------------------------+
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            +-----------------------------+
            ¦ Realization of this survey. ¦
            +-----------------------------+
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This telephone Survey FLASH EUROBAROMETRE 136: THE E-COMMERCE has been
conducted on behalf of the DG INFSO of the European Commission.

It has been managed and organised by the DG Press and Communication, Unit
B/1 « Opinion Polls, Press Reviews, Europe Direct ».

The interviews have been conducted between the 12 November and the 2 December
2002 by these EOS GALLUP EUROPE Institutes :

Belgium	DIMARSO - BRUXELLES	(13/11/02 - 02/12/02)
Denmark	GALLUP - KOBENHAVN	(13/11/02 - 19/11/02)
Germany	EMNID - BIELEFELD	(13/11/02 - 26/11/02)
Greece	ICAP - ATHENS	(12/11/02 - 22/11/02)
Spain	DEMOSCOPIA - MADRID	(13/11/02 - 29/11/02)
Finland	SUOMEN GALLUP - ESPOO	(14/11/02 - 25/11/02)
France	SOFRES - MONTROUGE	(13/11/02 - 26/11/02)
Ireland	IRISH MKTG SURVEYS - DUBLIN	(12/11/02 - 20/11/02)
Italy	DOXA - MILANO	(13/11/02 - 26/11/02)
Luxemburg	ILReS - LUXEMBOURG	(12/11/02 - 26/11/02)
Netherlands	NIPO - AMSTERDAM	(14/11/02 - 29/11/02)
Austria	ÖSTERREICHISCHES GALLUP - VIENNA	(21/11/02 - 27/11/02)
Portugal	EUROTESTE - LISBOA	(14/11/02 - 02/12/02)
Sweden	SVENSKA GALLUP - STOCKHOLM	(13/11/02 - 19/11/02)
United Kingdom	ICM - LONDON	(12/11/02 - 21/11/02)

The targets for this Flash Eurobarometer have been defined by the European
Commission as : all the companies - farmers excluded - employing 10 persons or
more, installed in the European Union.

Dun & Bradstreet prepared the lists of companies which were qualified to be
interviewed, by drawing a sample from their european data-bases. This sampling
has been made according to three criteria : the Country (15 levels), the size
of the company (3 levels : 10-49, 50- 249 and 250 employees or more), and the
activity sector (3 levels : Construction & Industry, Services & Transports,
and Trade). Within each of the 135 cells defined by these criteria, the
sampling has been made at random.

The total sample has been distributed between these sampling "cells" in a way
which does not follow the actual distribution of businesses within the
European Internal Market : the small countries as well as the larger
businesses have been intentionally « over- sampled » in order to get
significant results for each important level of analysis, i.e. :

      - the 15 member states
      - the 3 employment sizes of the businesses
      - the 4 activity sectors.

Of course, during the data processing, each cell in the cross distribution of the sample has been re-weighted down or up to its real weight within the European Internal Market. Thus the total results presented are not affected by over- and under-samplings anymore, and they are representative for the total universe of the « 10 jobs and up Enterprises of the European Internal Market ».

The person interviewed in each company is its boss (in charge of the General Management), or one of its highest managers for its financial or IT operations. It is the interviewer which insures the identity of this person, at the same time that he/she controls the accuracy of the enterprise characteristics, as delivered by Dun & Bradstreet, namely : the number of employed persons and the industrial sector.

The sample sizes amount to 300, 500 or 800 respondents in each Country.

Hereafter is presented the exact number of interviews conducted in each country, and the consequences of re-weighting this sample during the data-processing, in order to get representative results at each level of analysis :

    1. In the first column one get the absolute and relative frequencies of the interviews as they have been conducted.

    2. In the second column one get the structure of the sample when the over-sampling of the large businesses is removed in each individual country. This "redressed" sample is used to edit all the results at the National level (i.e.: tables presented in the Volume A, as described later). One will notice that the interviews frequencies in each country remained unchanged at that level : only the "sizes" structure is redressed, and the sectors are affected marginally.

    3. In the third column one get the structure of the sample when the over-sampling of the small countries has been removed too. This "weighted" sample is used to edit all the results at the European Union level (i.e.: tables presented in the Volume B, as described later). Now one will notice that the interviews frequencies in each country changed considerably, but that the "Sizes" as well as the "Sectors" structures are only marginally affected.

```
                +--------------------------------+
                | Sample before/after weighting. |
                +--------------------------------+
```

	Interviews REALISEES	Echantillon REDRESSE	Echantillon PONDERE
	---	---	---
	Interviews CONDUCTED	Sample REDRESSED	Sample WEIGHTED
TOTAL EU 15................	8007 100%	8007 100%	8007 100%
BELGIQUE...................	502 6%	502 6%	178 2%
DANMARK....................	500 6%	500 6%	117 1%
DEUTSCHLAND................	800 10%	800 10%	2321 29%
ELLAS......................	300 4%	300 4%	126 2%
ESPANA.....................	801 10%	801 10%	826 10%
FINLAND....................	300 4%	300 4%	83 1%
FRANCE.....................	802 10%	802 10%	1019 13%
IRELAND....................	300 4%	300 4%	79 1%
ITALIA.....................	800 10%	800 10%	1201 15%
LUXEMBOURG.................	300 4%	300 4%	17 0%
NEDERLAND..................	501 6%	501 6%	314 4%
ÖSTERREICH.................	500 6%	500 6%	207 3%
PORTUGAL...................	300 4%	300 4%	293 4%
SWEDEN.....................	500 6%	500 6%	155 2%
UNITED KINGDOM.............	801 10%	801 10%	1072 13%
SIZE (EMPLOYMENT)			
10 to 49...................	4793 60%	6727 84%	6799 85%
50 to 249..................	2410 30%	1046 13%	979 12%
250 to 499.................	374 5%	106 1%	107 1%
500 to 999.................	214 3%	63 1%	60 1%
1000 to 2999...............	138 2%	40 0%	36 0%
3000 and more..............	78 1%	25 0%	27 0%
ACTIVITY SECTOR			
Construction...............	545 7%	1068 13%	1016 13%
Manufact intermediate goods.	451 6%	759 9%	875 11%
Manufact. finished goods....	1157 14%	1998 25%	2088 26%
Wholesale..................	1602 20%	1431 18%	1327 17%
Retail.....................	1248 16%	1204 15%	1159 14%
Transport..................	539 7%	286 4%	241 3%
Horeca.....................	501 6%	251 3%	281 4%
Financial services.........	274 3%	132 2%	86 1%
Business services..........	1156 14%	609 8%	672 8%
Personal services..........	534 7%	271 3%	261 3%
TURNOVER			
< 100.000 euros............	150 2%	184 2%	162 2%
+100.000 -> 250.000........	127 2%	126 2%	124 2%
+250.000 -> 500.000........	224 3%	245 3%	251 3%
+500.000 -> 1.000.000......	481 6%	602 8%	633 8%
+1 -> 2 millions...........	849 11%	1158 14%	1175 15%
+2 -> 7 millions...........	1691 21%	2135 27%	2160 27%
+7 -> 20 millions..........	1150 14%	997 12%	948 12%
+20 -> 40 millions.........	526 7%	325 4%	312 4%
+40 -> 80 millions.........	315 4%	167 2%	151 2%
+80 -> 150 millions........	222 3%	112 1%	91 1%
+150 millions..............	333 4%	160 2%	139 2%
(dk/n.a.)..................	1939 24%	1795 22%	1861 23%
INTERVIEWED MANAGER			
General management.........	4455 56%	4915 61%	5051 63%
Financial Director.........	1535 19%	1547 19%	1531 19%
IT Director................	2017 25%	1544 19%	1424 18%