

Annex 1

Questionnaire 1 – EU enlargement : the perspectives of companies in the candidate and potential candidate countries

1. Knowledge on the EU accession process and EU acquis

1.1. *What is your level of knowledge on the EU accession negotiation process (actors, process itself, negotiation chapters, state of play, etc)?*

- Very good
- Good
- Moderate
- Low
- Very low
- No knowledge

1.2. *What is your level of knowledge on the business related EU acquis?*

- Very good
- Good
- Moderate
- Low
- Very low
- No knowledge

1.3. *To what extent does your company need to be informed in the following areas of the EU acquis?*

	Very comprehensive	Comprehensive	Some	A little	Very little	Do not need information
Competition rules	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Trade rules	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Product certification, technical regulations, standards	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Intellectual property rights (trademarks, patents, designs etc)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Taxation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Business environment (company law, accounting, auditing, public procurement, right of establishment)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Digitalisation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Environment / Energy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Food quality and safety	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Labour law, employment policy and social protection	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Consumer protection and producer liability	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Health and safety at work	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

1.4. What is your knowledge on the following EU initiatives in your region?

	Very good	Good / moderate	Low	Very low	No knowledge
Economic and Investment Plan	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
EU Green Agenda	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Connectivity Agenda	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Agenda on innovation, research, education, culture, youth and sport	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

1.5. What is your knowledge on EU financial assistance for your country and the following EU programmes? (Please select only one option for each programme)

	Very good	Good / Moderate	Low	Very low	No knowledge
Instrument for Pre-accession Assistance(IPA III) for the Western Balkans or Neighbourhood, Development and International Cooperation Instrument – Global Europe (NDICI – Global Europe) for Georgia, Moldova and Ukraine	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Single Market Programme	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Horizon Europe	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Erasmus +	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
European Social Fund + (ESF+)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Digital Europe	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

2. Information sources and services on EU *acquis*

2.1. Is your company informed on the EU *acquis* affecting its field of activity? If yes, to what extent?

- No, not informed
- Yes, sufficiently informed
- Yes, but insufficiently informed

2.2. What is your main source of information on the EU *acquis*? (Please select one option)

- Chamber network
- Other National trade and business organisations
- Enterprise Europe Network (EEN)
- Local consulting companies
- International consulting companies
- European Commission, including the EU delegation in your country
- Internet
- EU publications
- Diplomatic representatives of EU members states in your country
- Dedicated Ministry (European affairs, European integration, etc)
- Other Ministries

2.3. What kind of information services do you need most to be able to better understand the EU acquis? (Please indicate the three most important options)

- Dedicated training programmes
- Seminars, workshops, conferences
- Printed information materials on EU legislation and its actual implementation (reports, studies, guides, magazines, newsletters,)
- Professional consulting services – local or international consultants
- Technical assistance from the European Union and EU Member States (TAIEX)

3. Compliance with the EU acquis

3.1. In which phase of preparations for the implementation of the EU acquis is your company currently?

- Preparations have not started yet
- Programme for preparations is now being drafted
- Programme is duly adopted but implementation is not going satisfactorily
- Programme is being implemented.
- Do not know

3.2. Do you consider the compliance with the EU acquis as a tool for developing your company?

- Yes, it will improve the overall operation of my company
- No, it will not be usefull
- Do not know

3.3. Please indicate the level of difficulty for your company to comply with the EU acquis in the following area (Please select only one option for each area).

	Very high	High	Moderate	Low	Very low	No difficulties expected
Product certification, technical regulations, standards						
Digitalisation						
Environment / energy						
Health and safety at work						
Consumer protection						
Food safety and hygiene						

3.4. Please evaluate the magnitude of expected problems with implementing EU acquis in each of the following areas of your operations

	Very high	High	Moderate	Low	Very low	No problem expected	Do not know
Financial							
Technical							
Human resources							
Commercial							

3.5. On issues having an impact on business activities, are you consulted by your government on its position in the framework of the EU accession process?

- Yes, directly
- Yes, indirectly (through the Chamber or other business organisations)
- No, but we would be interested in being consulted
- No, and we do not want to be consulted

4. Attitudes and expectations towards EU membership

4.1. Which will be the most important effects of your country's potential EU membership for your company? (Please choose two options)

- Tougher competition at home market by European companies
- Long term strengthening of competitiveness
- Better access to European markets
- Bigger inflow of foreign direct investment
- More transparent business practices on the home market (competition rules, state aids, public procurement)
- Shortage of qualified workforce due to migration
- Stronger bargaining position vis-à-vis partners in third countries
- Other
- Do not know

4.2. How would you assess your company's business prospects as a consequence of a potential EU membership?

- Very optimistic
- Optimistic
- No impact
- Pessimistic
- Very pessimistic
- Do not know

4.3. Are in favour of joining the EU?

- Yes, I am
- No, I am not
- Do not know

4.4. When do you think your country can join the EU?

- In less than 5 years
- 5 years later
- 10 years later
- 15 years later
- In more than 15 years
- Never
- Do not know

- 4.5. According to you what will be the most critical criterion that your country has to meet to become a member of the EU? (Please select only one answer)
- Political criteria, including stability of institutions guaranteeing democracy, the rule of law, human rights, respect for and protection of minorities, as well as respect for international obligations, regional cooperation and good neighbourly relations
 - Economic criteria, including existence of a functioning market economy and the capacity to cope with competitive pressure and market forces within the EU
 - Ability to assume the obligations of membership (application and implementation of the EU acquis)
- 4.6. Would you be in favour of a gradual/ partial integration in the EU Single Market , for instance a sectoral inclusion of the candidate / potential candidate countries following the closure of certain negotiating clusters?
- Yes
 - No
- 4.7. Do you think the enlargement process should be more transparent and coherent?
- Yes
 - No

Annex 2

Questionnaire 2 – EU enlargement : the perspectives of chambers in the European Union

1. Trade and investment relations between the EU and the candidate and potential candidate countries

1.1. How do you assess the trade and investment relations between your country/ region with the following candidate / potential candidate countries? Please select one option for each country that corresponds best to your assessment.

	AL	BA	KO	ME	MK	SR	TR	GE	MD	UA
Long history of trading/ investment; established relations; very familiar with the market	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Familiar with the market; some business contacts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Not familiar with the market but would like to develop business relations and trade/invest more	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Not familiar with the market and not interested in exploring export or investment opportunities in this market	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

1.2. What are the main trade barriers while doing business in the candidate / potential candidate countries? (Select the 3 most relevant problems)

	AL	BA	KO	ME	MK	SR	TR	GE	MD	UA
Customs operations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Technical standards and certification	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Logistics	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lack of knowledge on SME finance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Payment from business partners	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Bureaucratic and restrictive procedures for company registration	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lack of knowledge on digital and green transitions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Labelling, advertising, access to final users	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Quality control, consumer protection	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lack of transparency and corruption	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
No problem at all	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

1.3. The leaders of the Western Balkans have agreed in 2020 to enhance economic cooperation in the region by developing a Common Regional Market, based on EU rules and standards. What do you think the Common Regional Market will bring for your business relations with the Western Balkans? Please select one option that corresponds best to your assessment.

- Significant advantages through easier access to the Western Balkans markets
- No significant advantage
- Not informed about the Common Regional Market in the Western Balkans

1.4. *Further to the Russian military aggression in Ukraine, how was your organization or your members mobilized to help the Ukrainian business community and Ukraine in general? You can select up to three options.*

- Coordination of humanitarian assistance
- Hosting staff of Ukrainian business organizations
- Providing capacity building to Ukrainian business organizations
- Facilitating the integration of Ukrainian refugees in your national labour market
- Participation in the reconstruction of Ukraine
- Not involved

2. Accession process to the European Union

2.1. *Do you think that EU accession from the current candidate / potential candidate countries would bring for companies in your country / region ...*

- Mainly benefits
- Mainly challenges
- A balance between benefits and challenges
- Do not have an opinion

2.2. *What would be the most important positive effect of the EU accession of the current candidate / potential candidate countries for the companies in your country / region? (Please rank from 1 to 4 where 1 means the most important and 4 the least important).*

- Easier access to their markets
- Better access to their capital markets
- More transparent business practices (competition rules, state aids, public procurement)
- Bigger inflow of direct investment

2.3. *What would be the most important negative effect of the EU accession of the current candidate / potential candidate countries for the companies in your country / region? (Please rank from 1 to 3 where 1 means the most important negative effect and 3 the least important negative effect).*

- Tougher competition at home market
- Increased unemployment
- Relocation of companies

2.4. *Would you be in favour of a gradual / partial integration, for instance a sectoral inclusion of the candidate countries following the closure of certain negotiating chapter clusters?*

- Yes
- No

2.5. *Do you think the enlargement process should be more transparent and coherent?*

- Yes
- No

2.6. *How well is your organization informed on the current EU enlargement process?*

- Fully informed on the state of play of the accession negotiations
- We have some partial information on the on-going accession negotiations
- We have no information, but we would like to be informed
- We are not interested in the current EU enlargement process

2.7. *Is your organization actively involved in the current EU accession negotiations at European or National level?*

- Yes
- No

2.8. *Should the business representatives be more involved in the EU accession process?*

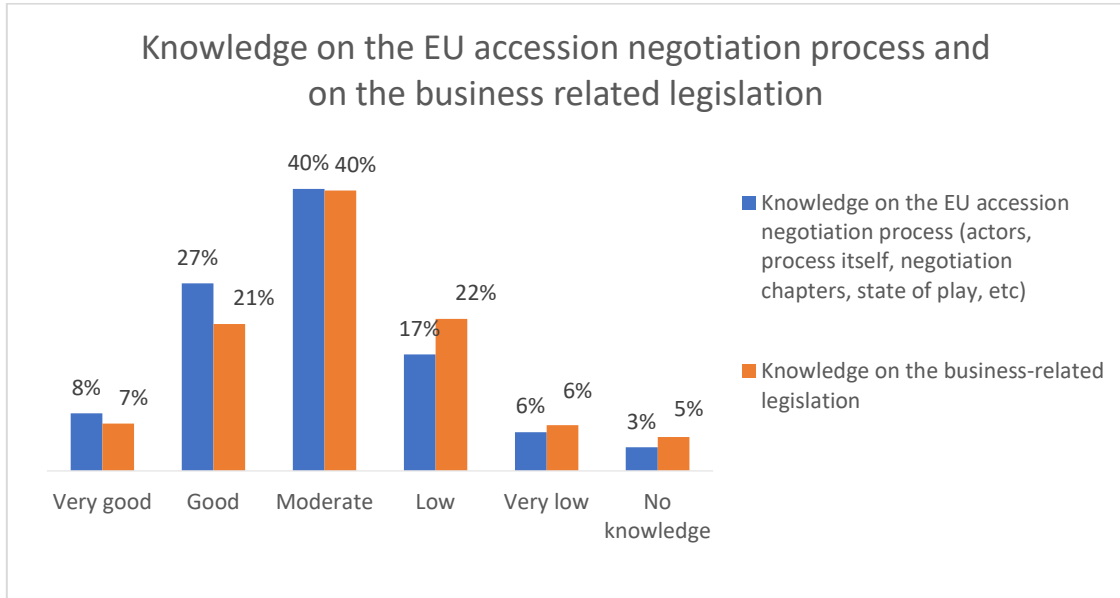
- Yes
- No

Annex 3

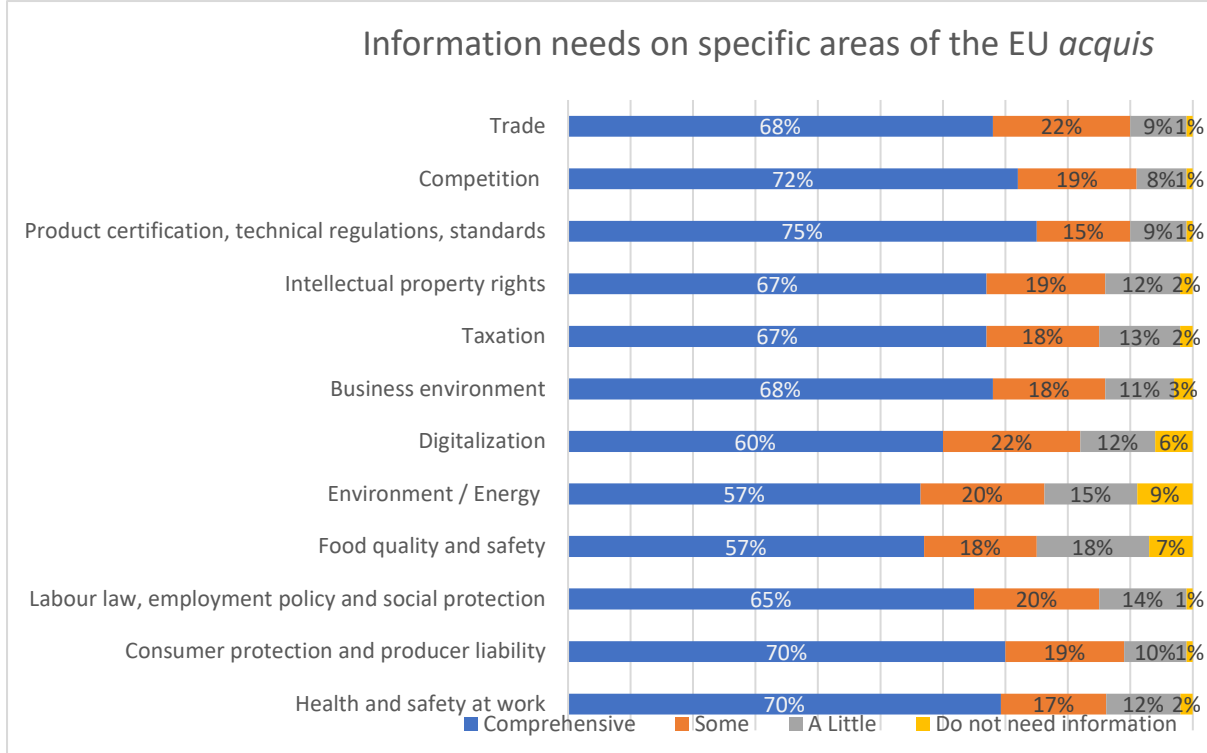
Full list of graphs

1. Survey among companies in the candidate and potential candidate countries

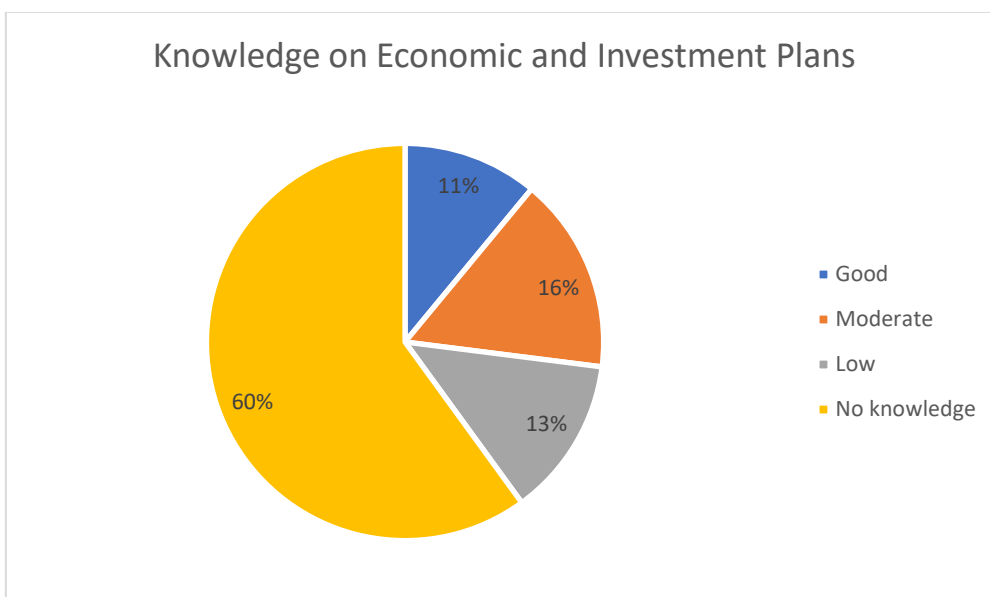
Graph 1: Knowledge on the EU accession process and on business-related EU legislation



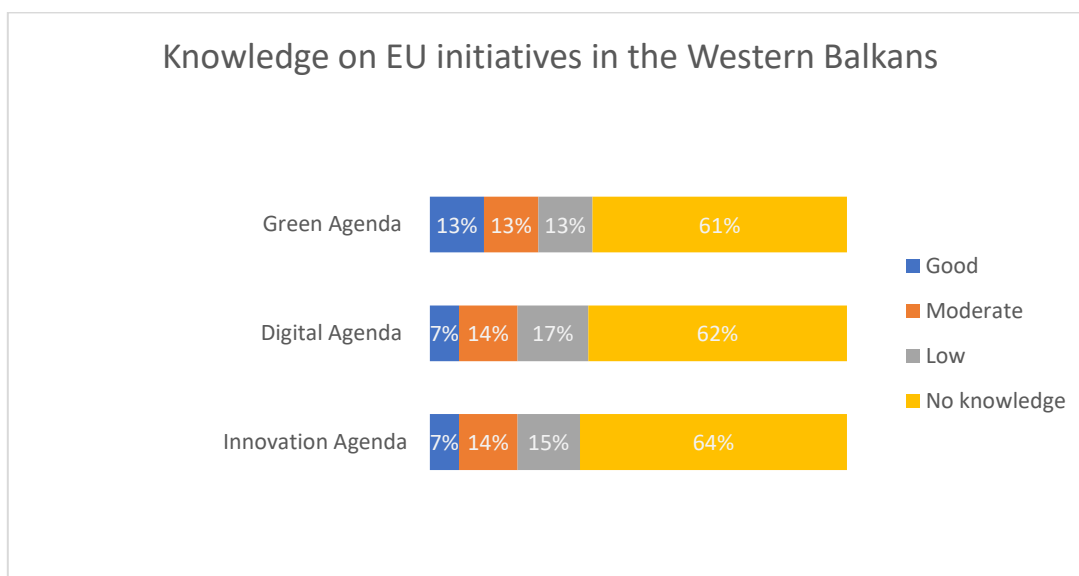
Graph 2: Information needs on specific areas of the EU acquis



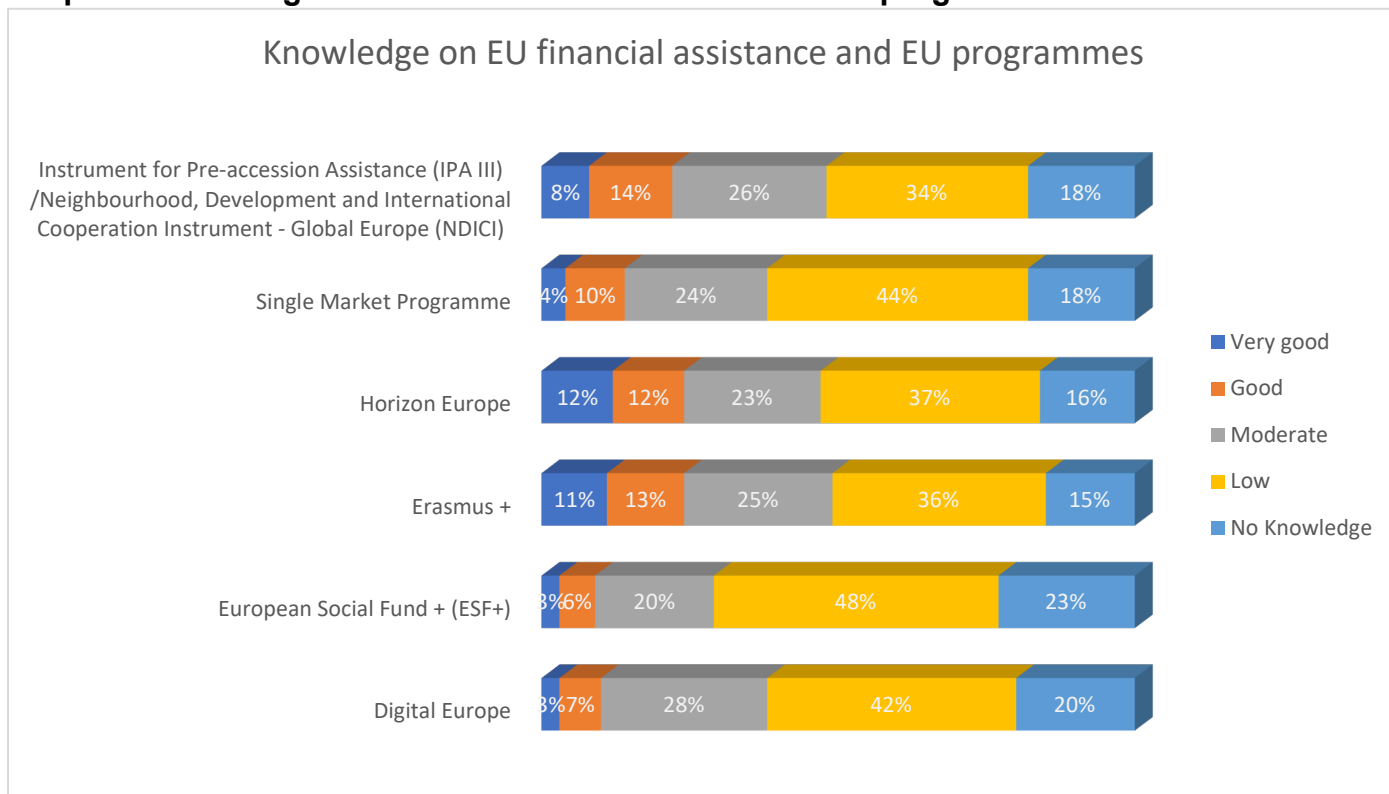
Graph 3: Knowledge on the Economic and Investment Plans in the Western Balkans and the Eastern Partnership countries



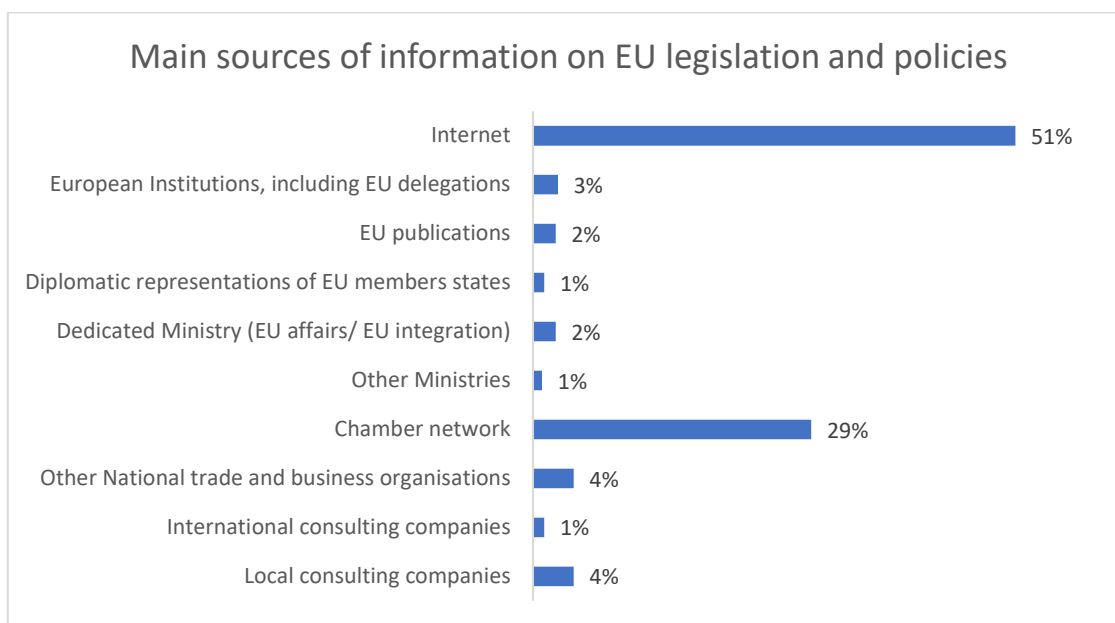
Graph 4: Knowledge on EU initiatives in the Western Balkans



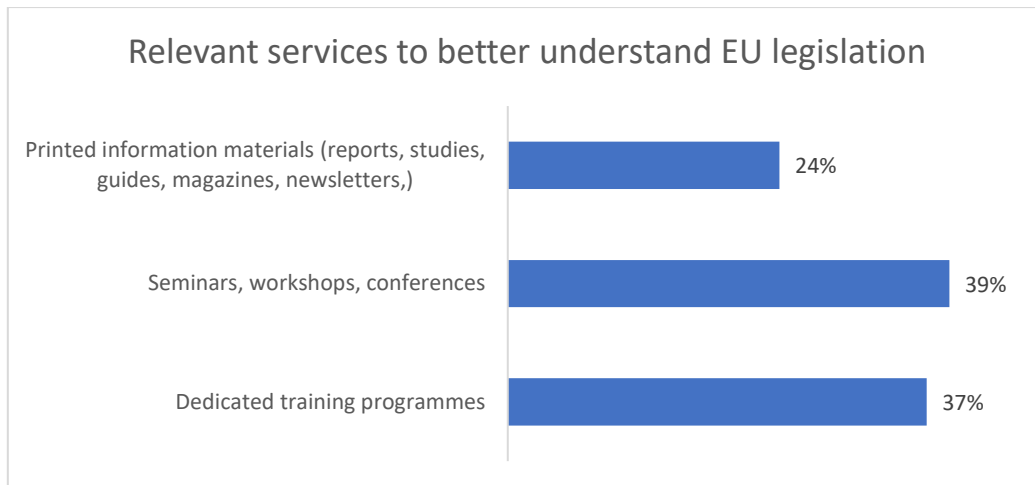
Graph 5: Knowledge on EU financial instruments and EU programmes



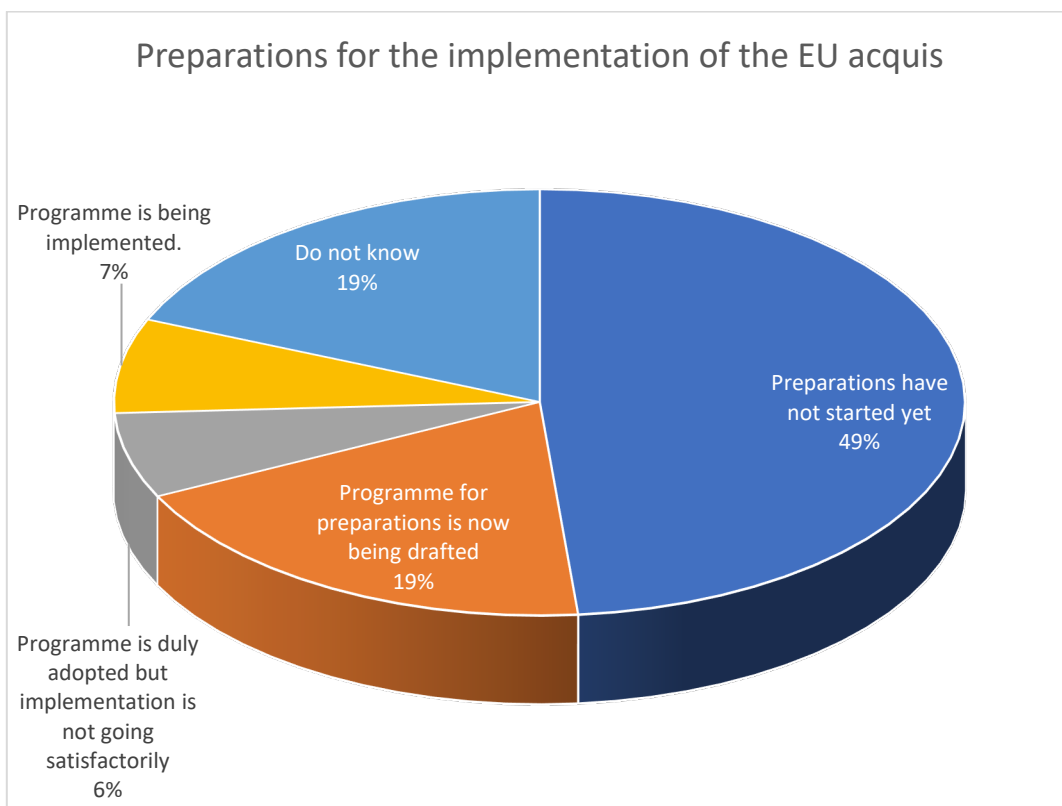
Graph 6: Main sources of information on EU legislation and policies



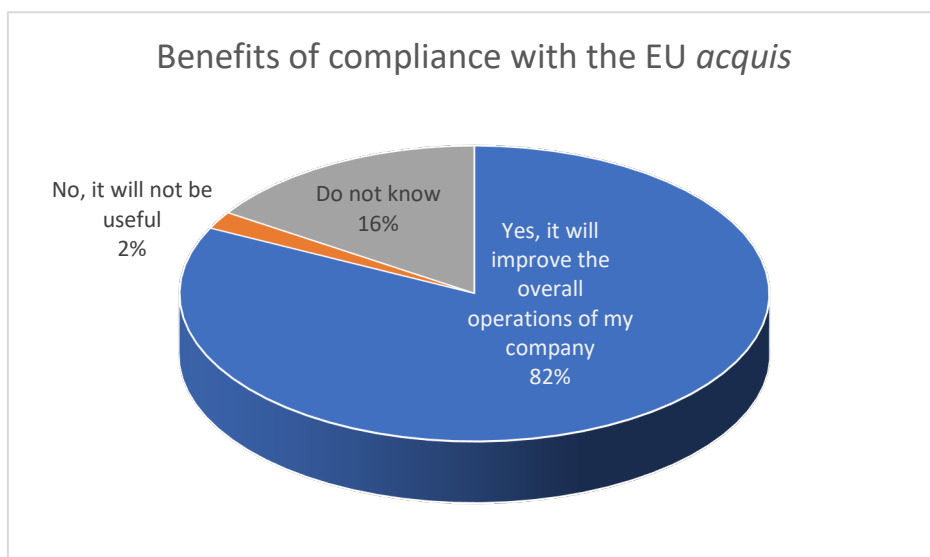
Graph 7: Relevant services to better understand EU legislation



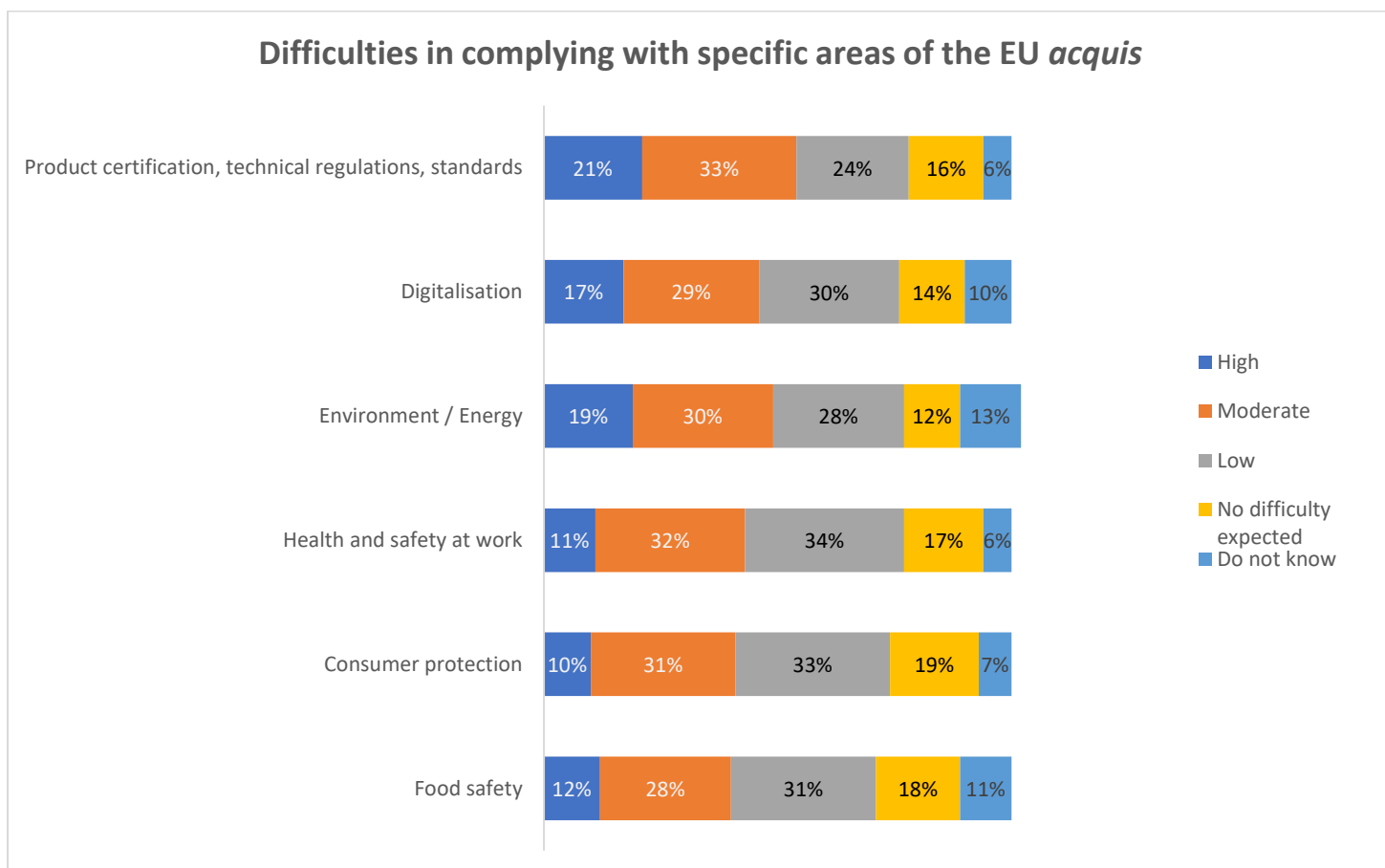
Graph 8: Preparations for the compliance with the EU *acquis*



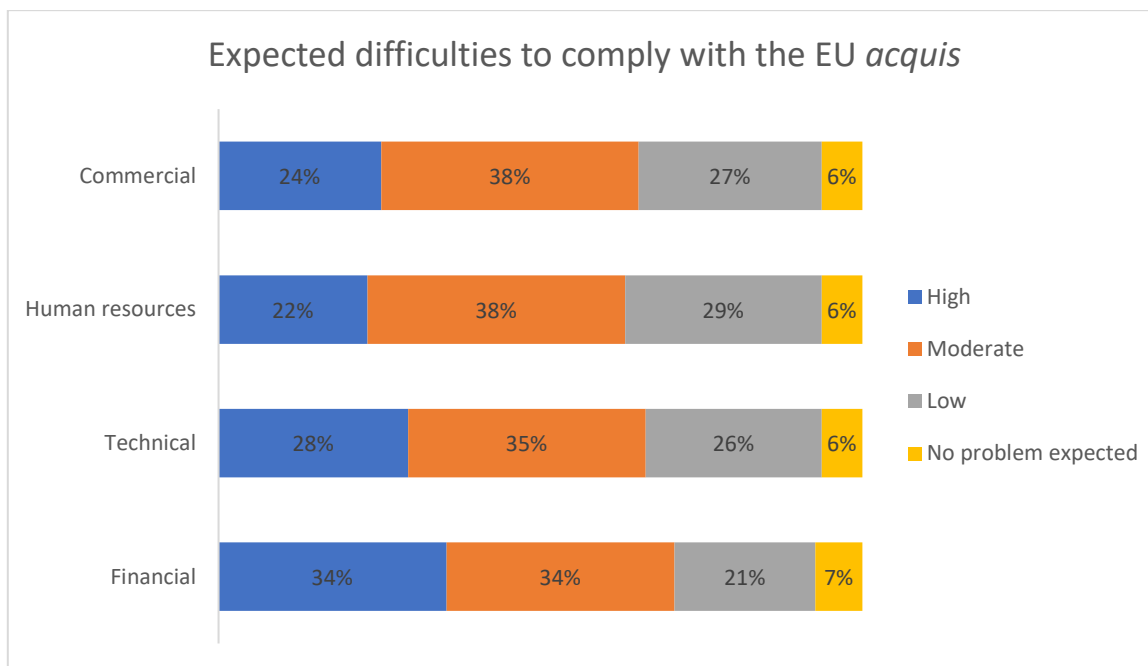
Graph 9: Benefits of compliance with the EU *acquis*



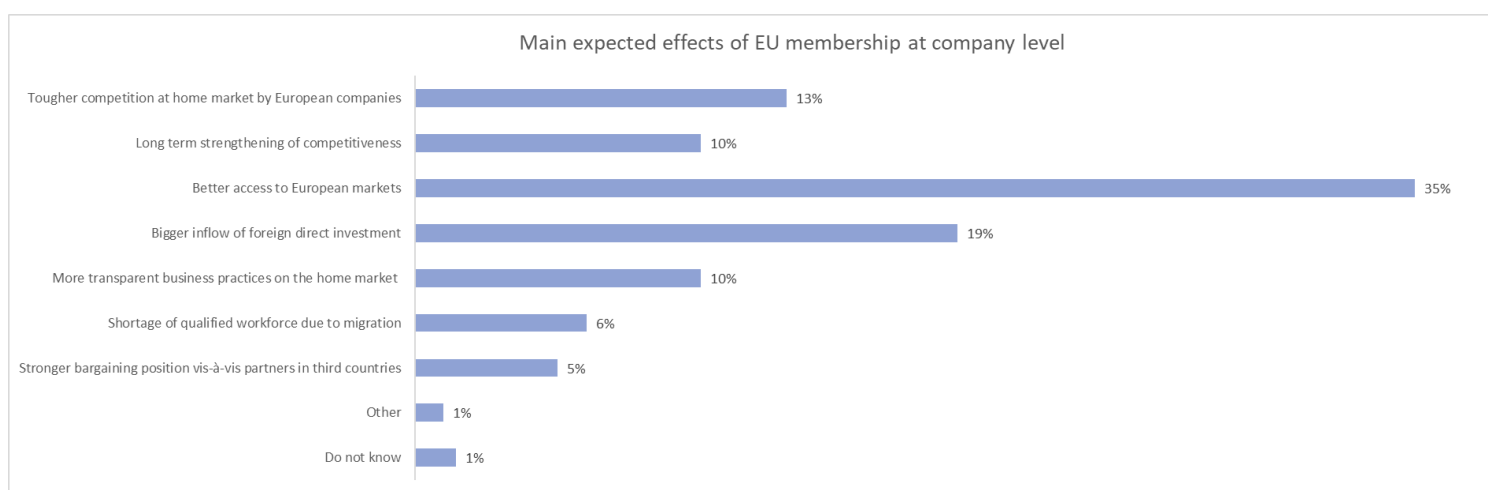
Graph 10: Difficulties in complying with specific areas of the EU *acquis*



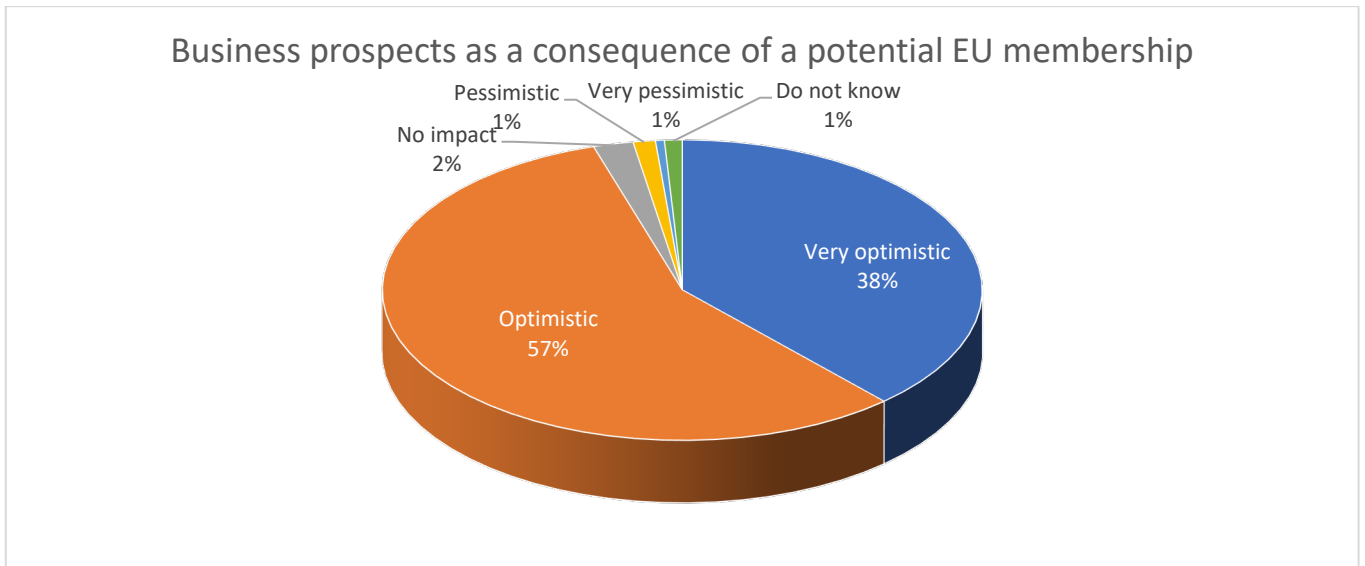
Graph 11: Expected difficulties within the company to comply with the EU *acquis*



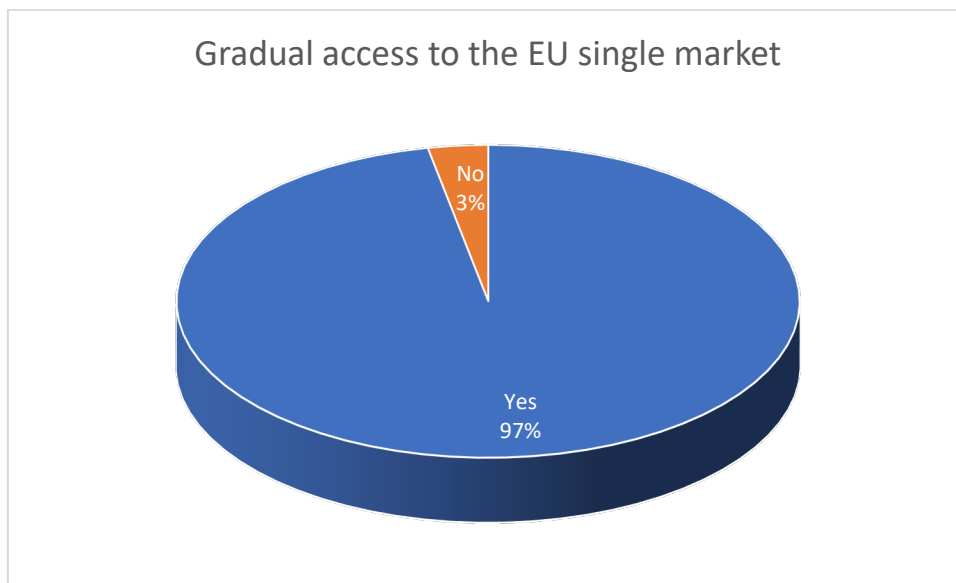
Graph 12: Expected effects of EU membership at company level



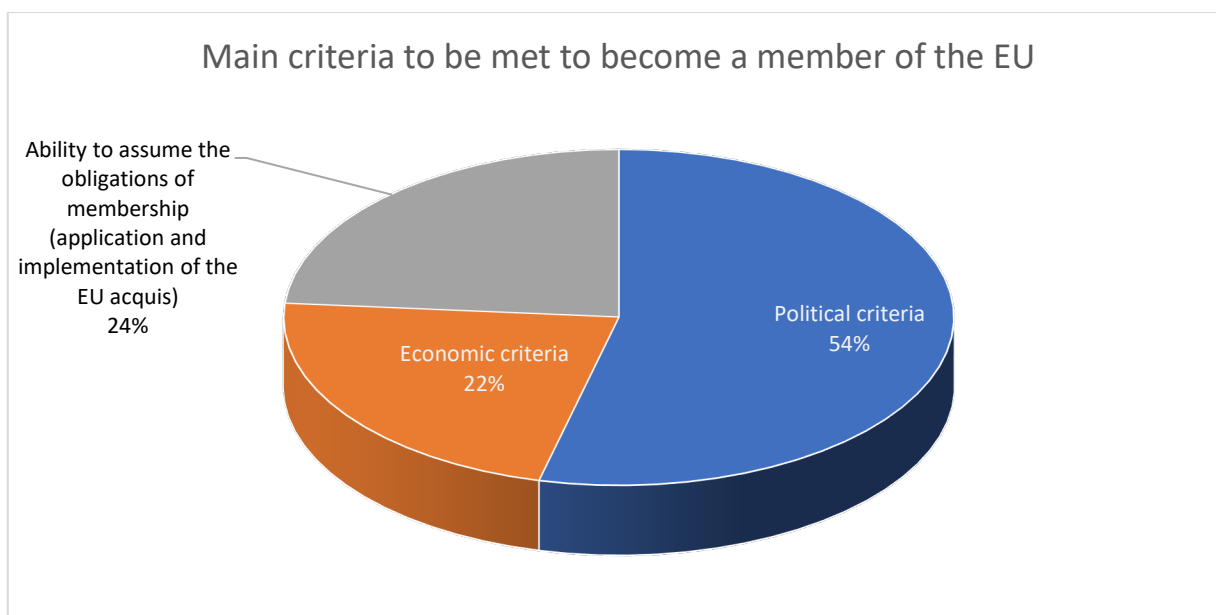
Graph 13: Business prospects for post accession



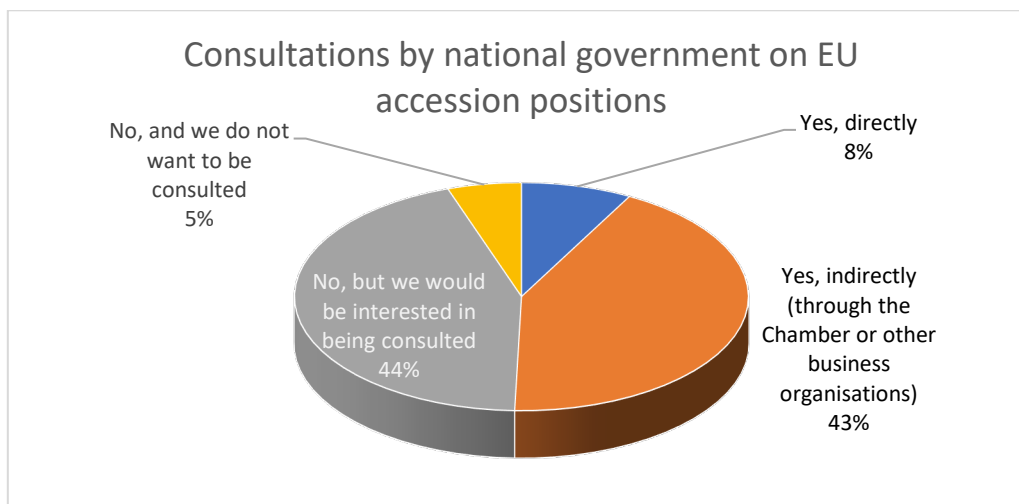
Graph 14: Support to gradual access to the EU single market



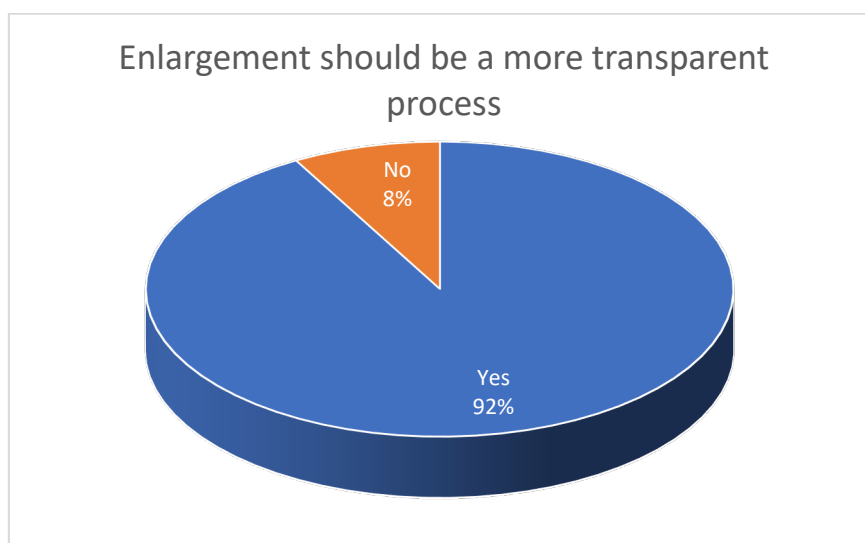
Graph 15: Main accession criteria



Graph 16: Consultations by national governments at the different stage of the EU accession process

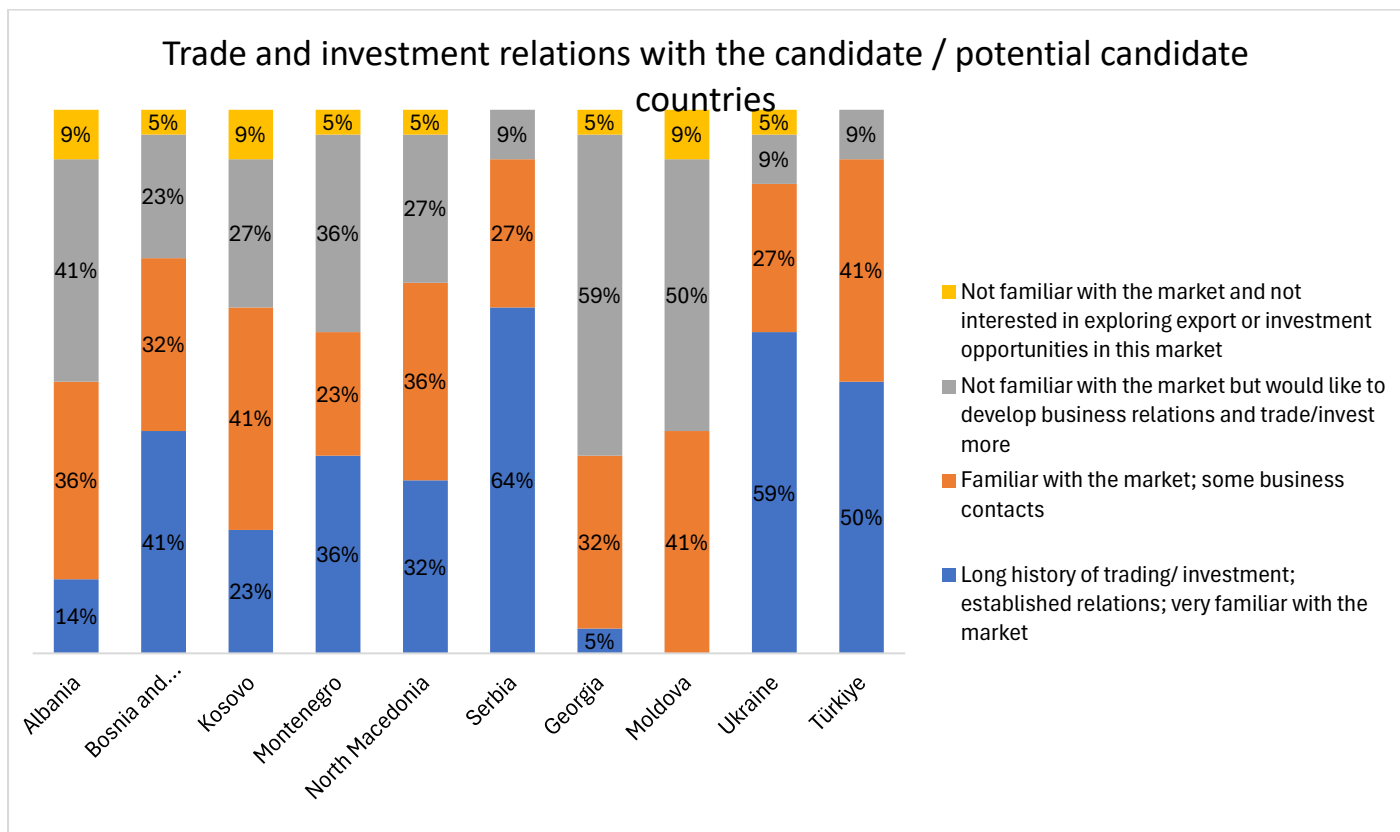


Graph 17: Transparency of the EU enlargement



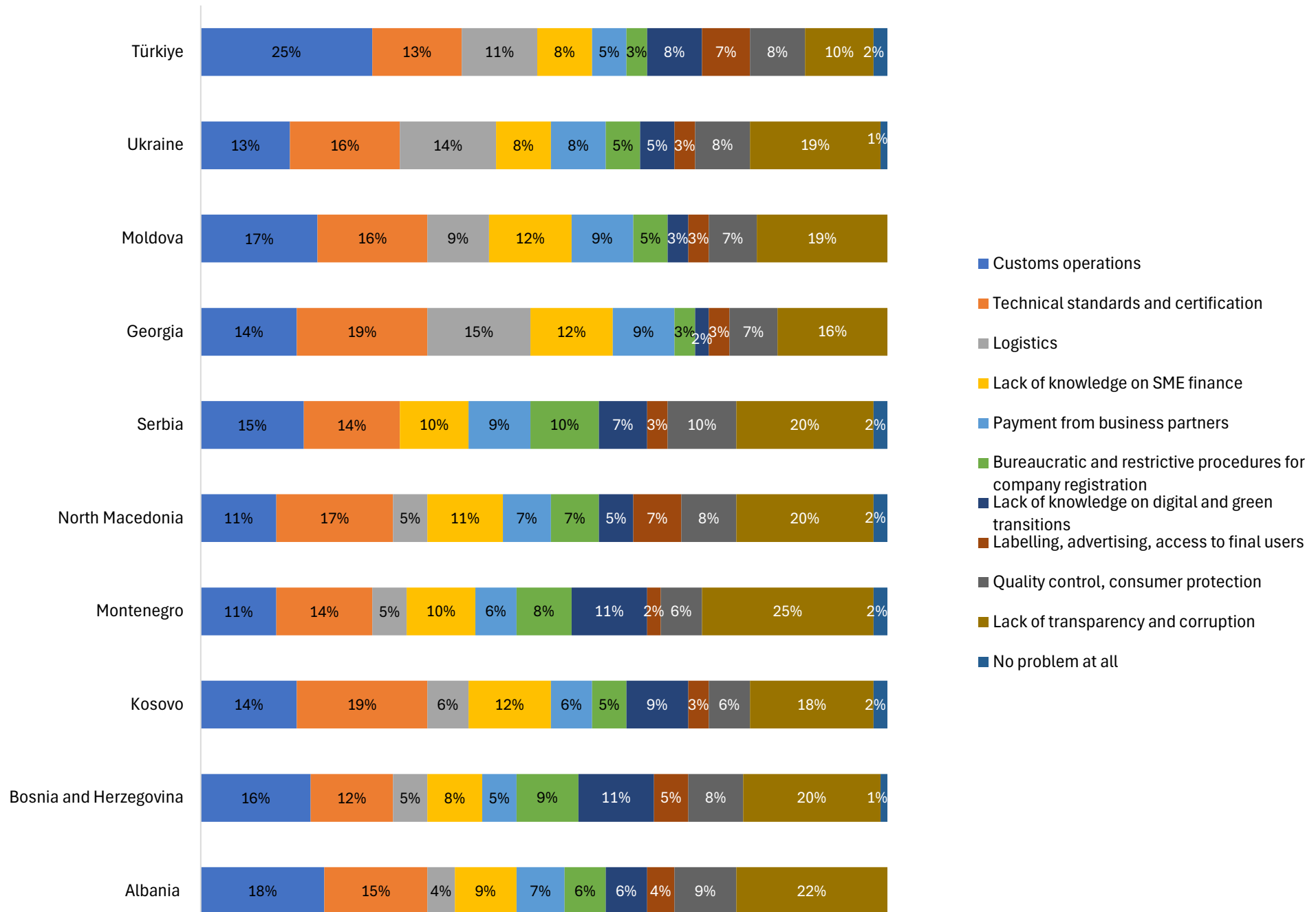
Survey among chambers in the European Union

Graph 18: Trade and investment relations between the European and the candidate and potential candidate countries

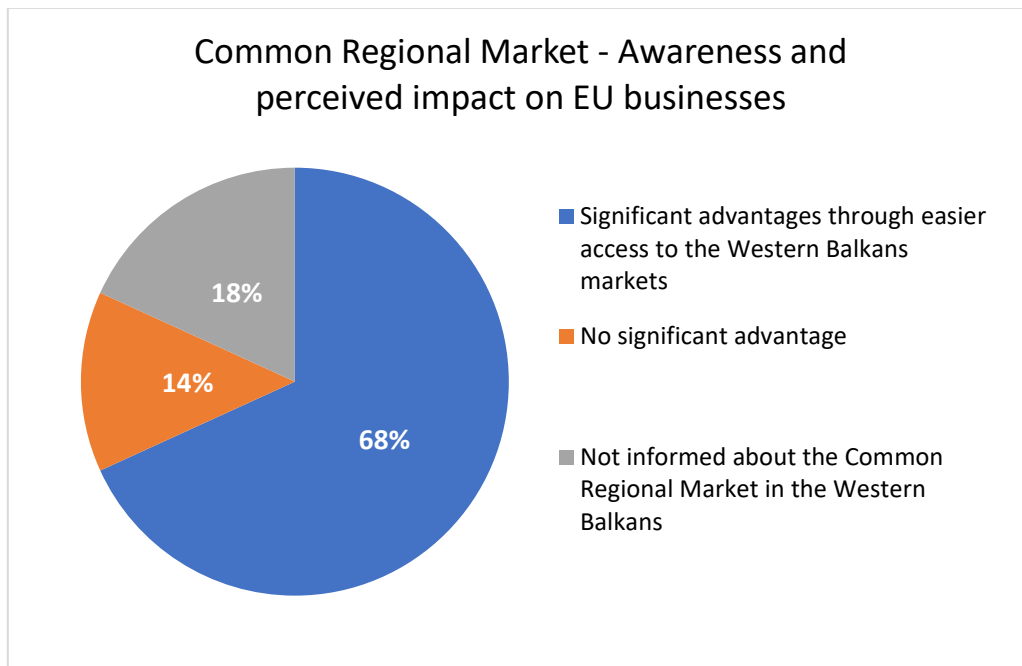


Graphs 19: Main barriers to trade and investment in the candidate and potential candidate countries

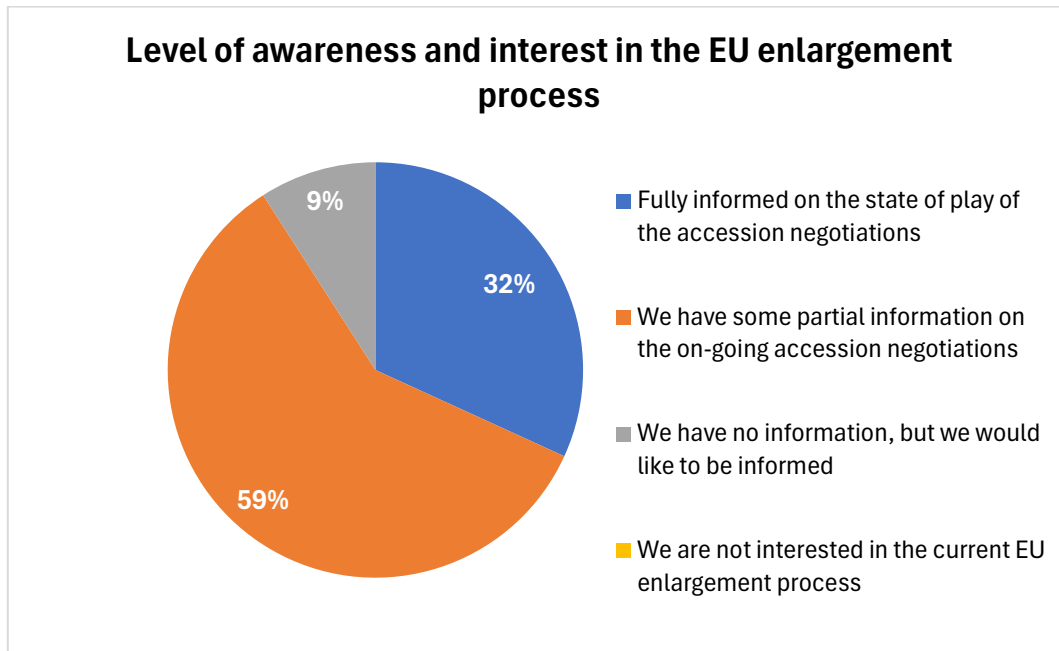
Main barriers to trade and investment in the candidate and potential candidate countries



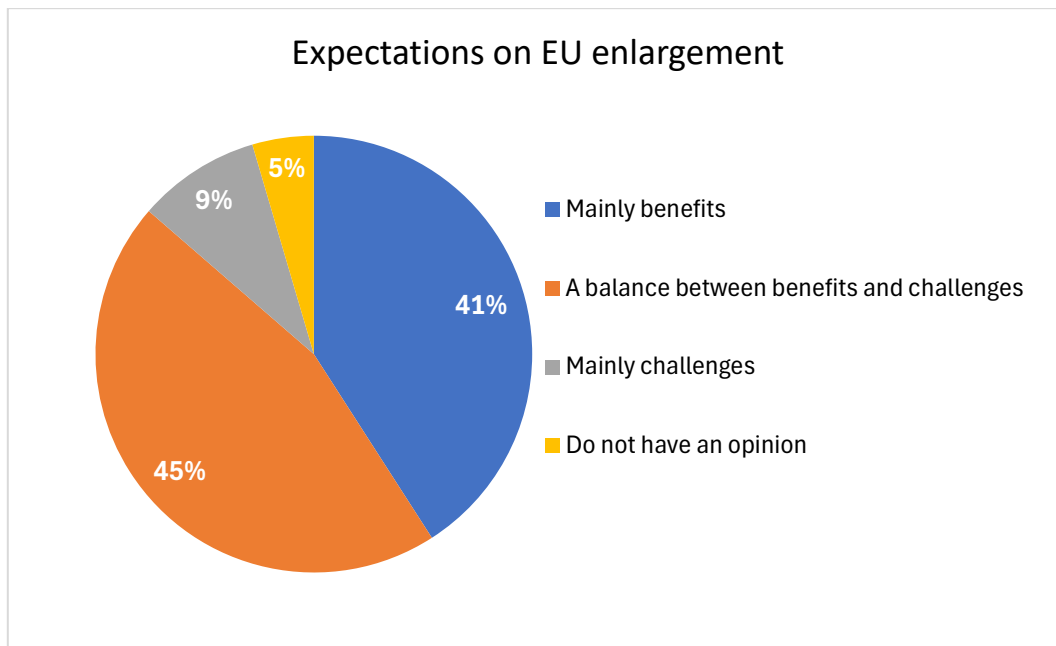
Graph 20: Awareness and perceived impact of the Common Regional Market on EU businesses



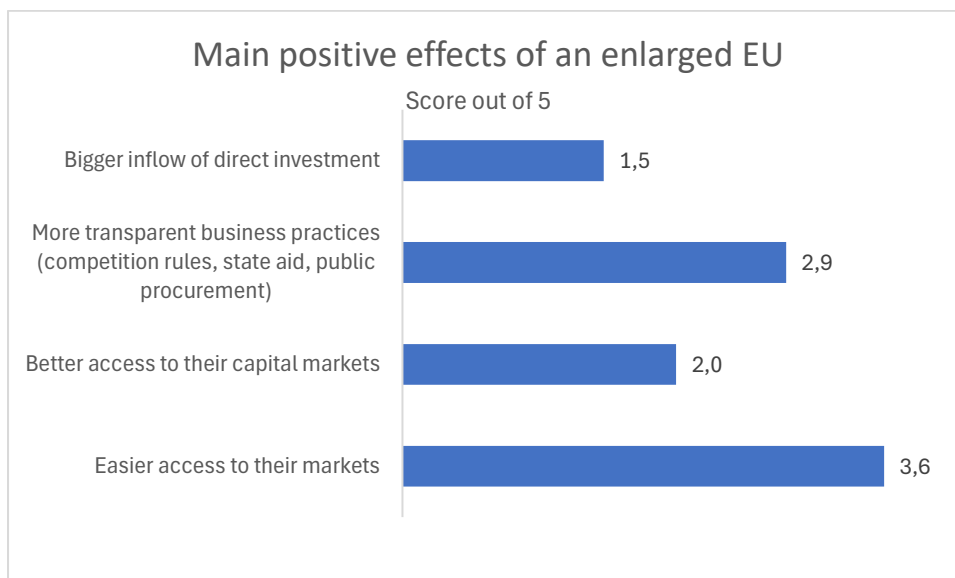
Graph 21: Level of awareness and interest in the EU enlargement process



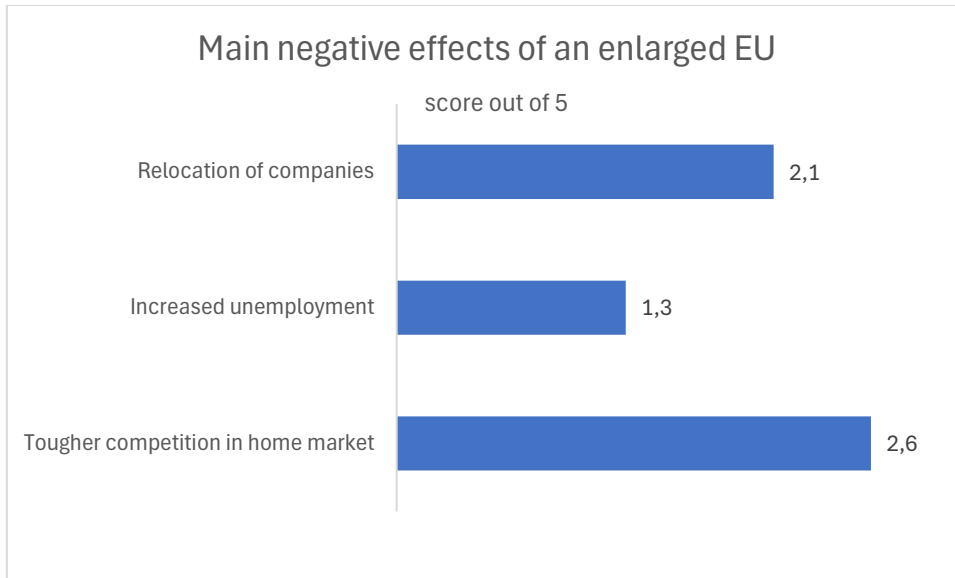
Graph 22: Expectations on EU enlargement



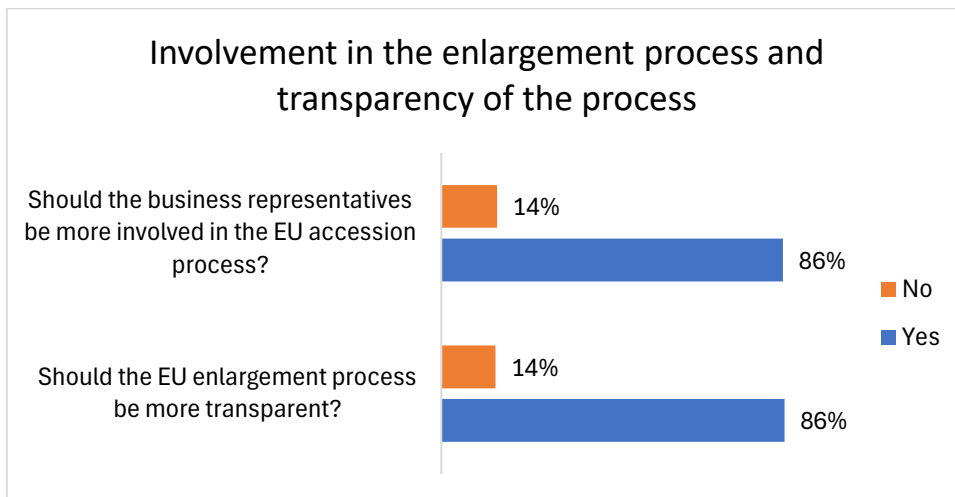
Graph 23 : Main expected positive effects of an enlarged EU



Graph 24: Main expected negative effects of an enlarged EU

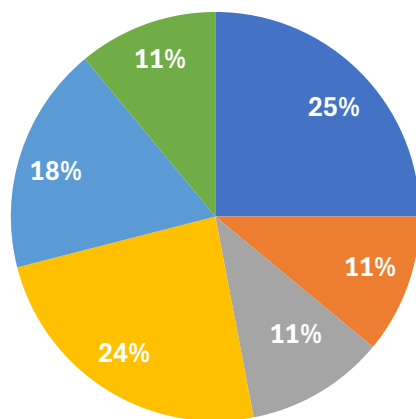


Graph 25: Involvement of chambers in the European Union in the enlargement process and transparency of the process



Graph 26: Support of the EU business community to Ukraine

Support of the EU business community to Ukraine since the start of the Russian invasion



- Coordination of humanitarian assistance
- Hosting staff of Ukrainian business organizations
- Providing capacity building to Ukrainian business organizations
- Facilitating the integration of Ukrainian refugees in your national labour market
- Participation in the reconstruction of Ukraine
- Not involved