

Research Report

Economic impact of regulation in the field of liberal professions in different Member States

Regulation of Professional Services

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Final Report – Part 3

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*** (Case Studies: Germany, France)**

****The contents of the study do not necessarily reflect the opinion
or position of the European Commission.**

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Annex A1 Composition of Regulation Indices - Lawyers

Lawyers	Market entry								Market conduct								Total
	ER	ERLC	ERED	ERED 1	ERED 2	ERED 3	ERED 4	ERQT	MCR	MCPR	MCAD	MCLOC	MCDIV	MCIC	MCIC 1	MCIC 2	
Austria	4.1	6.0	4.2	4.0	5.0	2.0	6.0	0.0	3.3	5.0	4.0	0.0	3.0	3.3	2.0	4.5	7.3
Belgium	2.5	3.0	3.3	5.0	3.0	0.0	6.0	0.0	2.1	0.0	2.0	0.0	3.0	4.8	5.0	4.5	4.6
Denmark	2.1	1.5	3.7	5.0	3.0	2.0	6.0	0.0	0.9	0.0	2.0	0.0	0.0	2.5	2.0	3.0	3.0
Finland	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	2.0	0.0	0.0	0.0	0.0	0.0	0.3
France	3.9	6.0	3.7	5.0	2.0	4.0	6.0	0.0	2.7	0.0	4.0	6.0	3.0	2.5	2.0	3.0	6.6
Germany	3.7	6.0	3.3	3.5	2.0	4.0	6.0	0.0	2.8	5.0	2.0	0.0	3.0	2.5	2.0	3.0	6.5
Greece	3.5	6.0	2.8	4.0	1.5	2.0	6.0	0.0	6.0	6.0	6.0	6.0	6.0	6.0	6.0	6.0	9.5
Ireland	2.4	3.0	3.0	4.0	2.0	4.0	2.0	0.0	2.1	0.0	4.0	0.0	0.0	6.0	6.0	6.0	4.5
Italy	2.6	3.0	3.4	4.0	3.0	2.0	6.0	0.0	3.9	6.0	4.0	0.0	3.0	4.8	5.0	4.5	6.4
Luxembourg	3.8	6.0	3.6	4.5	2.0	4.0	6.0	0.0	2.8	0.0	4.0	0.0	6.0	4.0	2.0	6.0	6.6
Netherlands	2.1	1.5	3.7	5.0	3.0	2.0	6.0	0.0	1.8	0.0	2.0	6.0	0.0	2.5	2.0	3.0	3.9
Portugal	3.5	6.0	2.8	4.0	1.5	2.0	6.0	0.0	2.2	2.0	6.0	0.0	0.0	3.3	2.0	4.5	5.7
Spain	3.4	6.0	2.5	5.0	0.0	2.0	6.0	0.0	3.1	2.0	4.0	0.0	3.0	5.5	5.0	6.0	6.5
Sweden	2.0	1.5	3.5	4.5	5.0	0.0	1.0	0.0	0.4	0.0	0.0	0.0	0.0	1.8	2.0	1.5	2.4
UK/E&W - Barristers	2.8	4.5	2.5	4.5	1.0	2.0	3.0	0.0	1.8	0.0	2.0	0.0	0.0	6.0	6.0	6.0	4.6
United Kingdom	2.9	4.5	2.9	4.5	2.0	2.0	3.0	0.0	0.6	0.0	2.0	0.0	0.0	1.0	2.0	0.0	3.5

Source: IHS questionnaires 2002 and other sources

ER: Entry regulation

ERLC: Entry regulation - Licensing

ERED: Entry regulation - Requirements in education

ERED 1: Entry regulation - Duration of special education: University or other higher degree

ERED 2: Entry regulation - Duration of compulsory practise

ERED 3: Entry regulation - Number of professional exams

ERED 4: Entry regulation - Number of entry routes to profession

ERQT: Entry regulation - Quotas/Economic needs test

MCR: Market conduct regulation

MCPR: Market conduct regulation - Regulation on prices and fees

MCAD: Market conduct regulation - Regulation on advertising

MCLOC: Market conduct regulation - Regulations on location

MCDIV: Market conduct regulation - Regulations on diversification

MCIC: Market conduct regulation - Regulations on form of business and inter-professional co-operation

MCIC 1: Market conduct regulation - Regulations on form of business

MCIC 2: Market conduct regulation - Regulations on inter-professional co-operation

Annex A2 Composition of Regulation Indices - Notaries

Notaries	Market entry								Market conduct								Total
	ER	ERLC	ERED	ERED 1	ERED 2	ERED 3	ERED 4	ERQT	MCR	MCPR	MCAD	MCLOC	MCDIV	MCIC	MCIC 1	MCIC 2	
Austria	5.4	6.0	4.6	4.0	6.0	2.0	6.0	6.0	4.2	4.0	4.0	0.0	6.0	5.5	5.0	6.0	9.6
Belgium	4.0	3.0	4.0	6.0	3.0	2.0	6.0	6.0	5.3	5.0	4.0	6.0	6.0	5.5	5.0	6.0	9.3
France	5.3	6.0	4.2	6.0	3.0	4.0	4.0	6.0	4.7	5.0	6.0	0.0	6.0	5.5	5.0	6.0	10.0
Germany	5.5	6.0	4.7	3.5	6.0	4.0	4.0	6.0	5.6	6.0	4.0	6.0	6.0	5.5	5.0	6.0	11.0
Greece	5.2	6.0	4.0	4.0	3.5	4.0	6.0	6.0	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Italy	4.8	6.0	3.0	4.0	2.0	2.0	6.0	6.0	5.9	6.0	6.0	6.0	6.0	5.5	5.0	6.0	10.7
Luxembourg	5.1	6.0	3.7	5.0	3.0	2.0	6.0	6.0	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Netherlands	3.6	4.5	4.6	4.0	6.0	2.0	6.0	0.0	2.6	3.0	2.0	0.0	6.0	1.5	0.0	3.0	6.3
Portugal	4.6	6.0	2.5	5.0	1.0	0.0	6.0	6.0	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	0.0	0.0	n.a.
Spain	4.6	6.0	2.5	5.0	0.0	2.0	6.0	6.0	4.8	6.0	6.0	6.0	0.0	6.0	6.0	6.0	9.4

Source: IHS questionnaires 2002 and other sources

ER: Entry regulation

ERLC: Entry regulation - Licensing

ERED: Entry regulation - Requirements in education

ERED 1: Entry regulation - Duration of special education: University or other higher degree

ERED 2: Entry regulation - Duration of compulsory practise

ERED 3: Entry regulation - Number of professional exams

ERED 4: Entry regulation - Number of entry routes to profession

ERQT: Entry regulation - Quotas/Economic needs test

MCR: Market conduct regulation

MCPR: Market conduct regulation - Regulation on prices and fees

MCAD: Market conduct regulation - Regulation on advertising

MCLOC: Market conduct regulation - Regulations on location

MCDIV: Market conduct regulation - Regulations on diversification

MCIC: Market conduct regulation - Regulations on form of business and inter-professional co-operation

MCIC 1: Market conduct regulation - Regulations on form of business

MCIC 2: Market conduct regulation - Regulations on inter-professional co-operation

Annex A3 Composition of Regulation Indices - Accountants

Accountants	Market entry								Market conduct								Total
	ER	ERLC	ERED	ERED 1	ERED 2	ERED 3	ERED 4	ERQT	MCR	MCPR	MCAD	MCLOC	MCDIV	MCIC	MCIC 1	MCIC 2	
Austria	4.2	6.0	4.4	4.0	5.0	4.0	4.0	0.0	2.0	2.0	2.0	0.0	3.0	2.5	2.0	3.0	6.2
Belgium	3.9	6.0	3.8	4.0	3.0	4.0	6.0	0.0	2.4	0.0	4.0	0.0	3.0	4.8	5.0	4.5	6.3
Denmark	2.2	1.5	4.1	5.0	3.0	4.0	6.0	0.0	0.6	0.0	0.0	0.0	3.0	0.0	0.0	0.0	2.8
Finland	2.6	3.0	3.6	4.0	3.0	4.0	4.0	0.0	0.9	0.0	2.0	0.0	0.0	2.5	2.0	3.0	3.5
France	4.0	6.0	4.0	6.0	3.0	2.0	6.0	0.0	1.8	0.0	4.0	0.0	3.0	2.5	2.0	3.0	5.8
Germany	3.6	6.0	3.0	4.0	3.0	2.0	2.0	0.0	2.5	5.0	4.0	0.0	0.0	2.5	2.0	3.0	6.1
Greece	3.6	4.5	4.6	4.0	6.0	2.0	6.0	0.0	1.5	5.0	0.0	0.0	0.0	1.0	2.0	0.0	5.1
Ireland	2.7	3.0	3.7	3.0	5.0	4.0	0.0	0.0	0.3	0.0	2.0	0.0	0.0	0.0	0.0	0.0	3.0
Italy	3.2	4.5	3.4	4.0	3.0	2.0	6.0	0.0	1.9	2.0	2.0	0.0	0.0	4.5	6.0	3.0	5.1
Luxembourg	3.8	6.0	3.6	4.0	3.0	4.0	4.0	0.0	1.2	0.0	4.0	0.0	0.0	2.5	2.0	3.0	5.0
Netherlands	3.1	4.5	3.2	4.0	3.0	2.0	4.0	0.0	1.4	2.0	2.0	0.0	0.0	2.5	2.0	3.0	4.5
Portugal	2.7	3.0	3.7	5.0	3.0	2.0	6.0	0.0	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Spain	1.9	1.5	3.3	3.0	3.0	4.0	4.0	0.0	1.5	1.0	4.0	0.0	0.0	2.5	2.0	3.0	3.4
Sweden	2.4	2.0	4.0	4.0	5.0	1.0	6.0	0.0	0.9	0.0	2.0	0.0	0.0	2.5	2.0	3.0	3.3
United Kingdom	2.7	3.0	3.7	3.0	5.0	4.0	0.0	0.0	0.3	0.0	2.0	0.0	0.0	0.0	0.0	0.0	3.0

Source: IHS questionnaires 2002 and other sources

ER: Entry regulation

ERLC: Entry regulation - Licensing

ERED: Entry regulation - Requirements in education

ERED 1: Entry regulation - Duration of special education: University or other higher degree

ERED 2: Entry regulation - Duration of compulsory practise

ERED 3: Entry regulation - Number of professional exams

ERED 4: Entry regulation - Number of entry routes to profession

ERQT: Entry regulation - Quotas/Economic needs test

MCR: Market conduct regulation

MCPR: Market conduct regulation - Regulation on prices and fees

MCAD: Market conduct regulation - Regulation on advertising

MCLOC: Market conduct regulation - Regulations on location

MCDIV: Market conduct regulation - Regulations on diversification

MCIC: Market conduct regulation - Regulations on form of business and inter-professional co-operation

MCIC 1: Market conduct regulation - Regulations on form of business

MCIC 2: Market conduct regulation - Regulations on inter-professional co-operation

Annex A4 Composition of Regulation Indices - Architects

Architects	Market entry								Market conduct								Total
	ER	ERLC	ERED	ERED 1	ERED 2	ERED 3	ERED 4	ERQT	MCR	MCPR	MCAD	MCLOC	MCDIV	MCIC	MCIC 1	MCIC 2	
Austria	3.9	6.0	3.7	5.0	3.0	2.0	6.0	0.0	1.2	1.0	2.0	0.0	0.0	2.5	2.0	3.0	5.1
Belgium	2.4	3.0	2.9	5.0	2.0	0.0	6.0	0.0	1.6	5.0	2.0	0.0	0.0	0.0	0.0	0.0	3.9
Denmark	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Finland	1.4	1.5	2.0	0.0	5.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.4
France	2.2	3.0	2.4	6.0	0.0	0.0	6.0	0.0	0.9	0.0	2.0	0.0	0.0	2.5	2.0	3.0	3.1
Germany	1.8	1.5	3.0	4.0	3.0	0.0	6.0	0.0	2.7	6.0	4.0	0.0	0.0	2.5	2.0	3.0	4.5
Greece	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Ireland	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Italy	3.2	6.0	2.0	5.0	0.0	2.0	1.0	0.0	3.0	6.0	6.0	0.0	0.0	2.5	2.0	3.0	6.2
Luxembourg	2.6	4.5	2.1	4.0	2.0	0.0	1.0	0.0	2.7	5.0	4.0	0.0	0.0	3.3	2.0	4.5	5.3
Netherlands	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Portugal	2.2	3.0	2.4	5.0	1.0	2.0	1.0	0.0	0.6	0.0	4.0	0.0	0.0	0.0	0.0	0.0	2.8
Spain	3.2	6.0	1.9	5.0	0.0	0.0	4.0	0.0	0.8	2.0	2.0	0.0	0.0	0.0	0.0	0.0	4.0
Sweden	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
United Kingdom	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Source: IHS questionnaires 2002 and other sources

ER: Entry regulation

ERLC: Entry regulation - Licensing

ERED: Entry regulation - Requirements in education

ERED 1: Entry regulation - Duration of special education: University or other higher degree

ERED 2: Entry regulation - Duration of compulsory practise

ERED 3: Entry regulation - Number of professional exams

ERED 4: Entry regulation - Number of entry routes to profession

ERQT: Entry regulation - Quotas/Economic needs test

MCR: Market conduct regulation

MCPR: Market conduct regulation - Regulation on prices and fees

MCAD: Market conduct regulation - Regulation on advertising

MCLOC: Market conduct regulation - Regulations on location

MCDIV: Market conduct regulation - Regulations on diversification

MCIC: Market conduct regulation - Regulations on form of business and inter-professional co-operation

MCIC 1: Market conduct regulation - Regulations on form of business

MCIC 2: Market conduct regulation - Regulations on inter-professional co-operation

Annex A5 Composition of Regulation Indices - Engineers

Engineers	Market entry								Market conduct								Total
	ER	ERLC	ERED	ERED 1	ERED 2	ERED 3	ERED 4	ERQT	MCR	MCPR	MCAD	MCLOC	MCDIV	MCIC	MCIC 1	MCIC 2	
Austria	3.8	6.0	3.5	5.0	3.0	1.0	6.0	0.0	1.2	1.0	2.0	0.0	0.0	2.5	2.0	3.0	5.0
Belgium	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.2	0.0	4.0	0.0	3.0	0.0	0.0	0.0	1.2
Denmark	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Finland	1.1	1.5	1.3	3.0	0.0	0.0	4.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.1
France	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Germany	3.7	6.0	3.2	4.0	3.5	0.0	6.0	0.0	3.7	5.0	2.0	6.0	3.0	2.5	2.0	3.0	7.4
Greece	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Ireland	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Italy	3.4	6.0	2.5	5.0	0.0	2.0	6.0	0.0	3.0	6.0	6.0	0.0	0.0	2.5	2.0	3.0	6.4
Luxembourg	2.7	4.5	2.2	4.0	1.0	0.0	6.0	0.0	2.7	5.0	4.0	0.0	0.0	3.3	2.0	4.5	5.3
Netherlands	1.5	2.0	1.7	3.0	1.0	0.0	4.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.5
Portugal	3.4	6.0	2.4	4.0	2.0	0.0	4.0	0.0	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	0.0	0.0	n.a.
Spain	3.2	6.0	2.1	5.0	0.0	0.0	6.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.2
Sweden	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
United Kingdom	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Source: IHS questionnaires 2002 and other sources

ER: Entry regulation

ERLC: Entry regulation - Licensing

ERED: Entry regulation - Requirements in education

ERED 1: Entry regulation - Duration of special education: University or other higher degree

ERED 2: Entry regulation - Duration of compulsory practise

ERED 3: Entry regulation - Number of professional exams

ERED 4: Entry regulation - Number of entry routes to profession

ERQT: Entry regulation - Quotas/Economic needs test

MCR: Market conduct regulation

MCPR: Market conduct regulation - Regulation on prices and fees

MCAD: Market conduct regulation - Regulation on advertising

MCLOC: Market conduct regulation - Regulations on location

MCDIV: Market conduct regulation - Regulations on diversification

MCIC: Market conduct regulation - Regulations on form of business and inter-professional co-operation

MCIC 1: Market conduct regulation - Regulations on form of business

MCIC 2: Market conduct regulation - Regulations on inter-professional co-operation

Annex A6 Composition of Regulation Indices - Pharmacists

Pharmacists	Market entry								Market conduct								Total
	ER	ERLC	ERED	ERED 1	ERED 2	ERED 3	ERED 4	ERQT	MCR	MCPR	MCAD	MCLOC	MCDIV	MCIC	MCIC 1	MCIC 2	
Austria	3.6	1.5	2.8	4.5	1.0	2.0	6.0	6.0	3.7	3.0	4.0	0.0	6.0	4.8	5.0	4.5	7.3
Belgium	3.6	3.0	2.1	5.0	0.0	0.0	6.0	6.0	1.8	3.0	2.0	0.0	3.0	0.0	0.0	0.0	5.4
Denmark	2.3	1.5	2.1	5.0	0.0	0.0	6.0	3.0	3.6	5.0	2.0	0.0	3.0	6.0	6.0	6.0	5.9
Finland	4.0	4.5	2.3	5.0	0.5	0.0	6.0	6.0	3.0	3.0	2.0	0.0	3.0	6.0	6.0	6.0	7.0
France	3.8	3.0	2.5	5.0	1.0	0.0	6.0	6.0	3.5	5.0	4.0	0.0	3.0	4.0	2.0	6.0	7.3
Germany	1.6	1.5	2.9	4.0	1.0	6.0	1.0	0.0	4.1	5.0	2.0	0.0	6.0	5.5	5.0	6.0	5.7
Greece	4.4	6.0	2.4	4.0	0.5	2.0	6.0	6.0	4.5	5.0	4.0	0.0	6.0	6.0	6.0	6.0	8.9
Ireland	1.5	1.5	2.6	4.0	1.0	2.0	6.0	0.0	1.2	3.0	2.0	0.0	0.0	0.0	0.0	0.0	2.7
Italy	4.8	6.0	3.3	5.0	2.0	2.0	6.0	6.0	3.6	3.0	2.0	0.0	6.0	6.0	6.0	6.0	8.4
Luxembourg	4.0	4.5	2.2	4.5	0.5	0.0	6.0	6.0	3.9	3.0	4.0	0.0	6.0	6.0	6.0	6.0	7.9
Netherlands	1.2	1.5	1.9	6.0	0.0	0.0	1.0	0.0	1.8	3.0	2.0	0.0	3.0	0.0	0.0	0.0	3.0
Portugal	4.2	4.5	2.7	5.5	0.0	2.0	6.0	6.0	3.8	3.0	6.0	0.0	6.0	4.0	2.0	6.0	8.0
Spain	3.6	3.0	2.1	5.0	0.0	0.0	6.0	6.0	3.9	3.0	4.0	0.0	6.0	6.0	6.0	6.0	7.5
Sweden	4.2	6.0	2.1	5.0	0.0	0.0	6.0	6.0	5.4	6.0	2.0	6.0	6.0	6.0	6.0	6.0	9.6
United Kingdom	2.7	1.5	3.0	4.0	1.0	4.0	6.0	3.0	1.4	2.0	2.0	0.0	0.0	2.5	2.0	3.0	4.1

Source: IHS questionnaires 2002 and other sources

ER: Entry regulation

ERLC: Entry regulation - Licensing

ERED: Entry regulation - Requirements in education

ERED 1: Entry regulation - Duration of special education: University or other higher degree

ERED 2: Entry regulation - Duration of compulsory practise

ERED 3: Entry regulation - Number of professional exams

ERED 4: Entry regulation - Number of entry routes to profession

ERQT: Entry regulation - Quotas/Economic needs test

MCR: Market conduct regulation

MCPR: Market conduct regulation - Regulation on prices and fees

MCAD: Market conduct regulation - Regulation on advertising

MCLOC: Market conduct regulation - Regulations on location

MCDIV: Market conduct regulation - Regulations on diversification

MCIC: Market conduct regulation - Regulations on form of business and inter-professional co-operation

MCIC 1: Market conduct regulation - Regulations on form of business

MCIC 2: Market conduct regulation - Regulations on inter-professional co-operation

Annex B1 Excerpts of Comparable Structure Data -- Italy, Legal Services

ITALY - k7411 Legal services	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
Key Variables:										
F in units					74 158 ¹	77 367 ¹	80 241 ¹	70 254 ¹	79 093 ¹	87 608 ¹
T in Mio EUR					5 818 ¹	7 824 ¹	7 824 ¹	8 222 ¹	9 104 ¹	11 273 ¹
E in units					131 184 ¹	131 409 ¹	136 694 ¹	128 185 ¹	135 842 ¹	148 665 ¹
Professionals in units										139 500 ²
Population in Mio.					57.27 ¹	57.33 ¹	57.46 ¹	57.56 ¹	57.61 ¹	57.68 ¹
GDP in Bil. EUR					839 ¹	971 ¹	1 030 ¹	1 069 ¹	1 108 ¹	1 166 ¹
Key Indicators:										
T per Firm in 1000 EUR					78 ³	101 ³	98 ³	117 ³	115 ³	129 ³
E per 1000 firms					1 769 ³	1 699 ³	1 704 ³	1 825 ³	1 717 ³	1 697 ³
T per E in 1000 EUR					44 ³	60 ³	57 ³	64 ³	67 ³	76 ³
E per Mio. of Pop					2 291 ³	2 292 ³	2 379 ³	2 227 ³	2 358 ³	2 577 ³
F per Mio. of Pop					1 295 ³	1 349 ³	1 396 ³	1 220 ³	1 373 ³	1 519 ³
Prof per 1000 F					1 182 ³					1 592 ³
T per Prof in 1000 EUR					66 ³					81 ³
E per 1000 Prof					1 497 ³					1 066 ³
Prof Density (per Mio. Pop)					1 530 ³					2 419 ³
T per cap. in EUR					102 ³	136 ³	136 ³	143 ³	158 ³	195 ³
T in % of GDP					0.69 ³	0.81 ³	0.76 ³	0.77 ³	0.82 ³	0.97 ³
Vol in POI-adjusted Mio. EUR*					7 014 ³	8 557 ³	8 479 ³	8 989 ³	10 073 ³	12 577 ³
Vol per cap. in EUR*					122 ³	149 ³	148 ³	156 ³	175 ³	218 ³
Vol per firm in 1000 EUR*					95 ³	111 ³	106 ³	128 ³	127 ³	144 ³
Vol per E in 1000 EUR*					53 ³	65 ³	62 ³	70 ³	74 ³	85 ³
Vol per Prof in 1000 EUR*					80 ³					90 ³

¹ Source: Eurostat² Value refers to year 2001³ Value calc. by IHS

Annex B2 Excerpts of Comparable Structure Data -- Denmark, Accountancy Services

DENMARK - k7412 Accountancy	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
Key Variables:										
F in units		7 377 ¹	7 532 ¹						4 022 ³	4 104 ³
T in Mio EUR		1 048 ¹	1 067 ¹						1 199 ³	1 376 ³
E in units		20 246 ¹	19 370 ¹						16 366 ³	17 024 ³
Professionals in units										5 077 ²
Population in Mio.		5.16 ¹	5.18 ¹	5.20 ¹	5.22 ¹	5.25 ¹	5.28 ¹	5.29 ¹	5.31 ¹	5.33 ¹
GDP in Bil. EUR		114 ¹	119 ¹	128 ¹	138 ¹	144 ¹	149 ¹	156 ¹	165 ¹	176 ¹
Key Indicators:										
T per Firm in 1000 EUR		142 ⁴	142 ⁴						298 ⁴	335 ⁴
E per 1000 firms		2 744 ⁴	2 572 ⁴						4 069 ⁴	4 148 ⁴
T per E in 1000 EUR		52 ⁴	55 ⁴						73 ⁴	81 ⁴
E per Mio. of Pop		3 922 ⁴	3 739 ⁴						3 080 ⁴	3 194 ⁴
F per Mio. of Pop		1 429 ⁴	1 454 ⁴						757 ⁴	770 ⁴
Prof per 1000 F										1 237 ⁴
T per Prof in 1000 EUR										271 ⁴
E per 1000 Prof										3 353 ⁴
Prof Density (per Mio. Pop)										953 ⁴
T per cap. in EUR		203 ⁴	206 ⁴						226 ⁴	258 ⁴
T in % of GDP		0.92 ⁴	0.90 ⁴						0.72 ⁴	0.78 ⁴
Vol in POI-adjusted Mio. EUR*		766 ⁴	755 ⁴						820 ⁴	938 ⁴
Vol per cap. in EUR*		148 ⁴	146 ⁴						154 ⁴	176 ⁴
Vol per firm in 1000 EUR*		104 ⁴	100 ⁴						204 ⁴	229 ⁴
Vol per E in 1000 EUR*		38 ⁴	39 ⁴						50 ⁴	55 ⁴
Vol per Prof in 1000 EUR*										185 ⁴

¹ Source: Eurostat² Value refers to year 2001³ Source: Danish national data from Danmarks Statistik⁴ Value calc. by IHS

Annex B3 Excerpts of Comparable Structure Data --Germany, Technical Services

GERMANY - k742 Technical services	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
Key Variables:										
F in units										69 880 ¹
T in Mio EUR										32 490 ¹
E in units										360 269 ¹
Professionals in units										130 148 ²
Population in Mio.										82.16 ¹
GDP in Bil. EUR										20 255 ¹
Key Indicators:										
T per Firm in 1000 EUR										465 ³
E per 1000 firms										5 156 ³
T per E in 1000 EUR										90 ³
E per Mio. of Pop										4 385 ³
F per Mio. of Pop										850 ³
Prof per 1000 F										1 862 ³
T per Prof in 1000 EUR										250 ³
E per 1000 Prof										2 768 ³
Prof Density (per Mio. Pop)										1 584 ³
T per cap. in EUR										395 ³
T in % of GDP										1.60 ³
Vol in POI-adjusted Mio. EUR*										29 711 ³
Vol per cap. in EUR*										362 ³
Vol per firm in 1000 EUR*										425 ³
Vol per E in 1000 EUR*										82 ³
Vol per Prof in 1000 EUR*										228 ³

¹ Source: Eurostat² Value refers to year 2001³ Value calc. by IHS

Annex C1 GDP per capita in Purchasing Power Standard (PPS)

	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
Belgium	107.2	110.0	113.2	113.0	112.2	110.7	111.0	110.5	109.9	110.5
Denmark	110.4	108.0	113.2	116.6	118.1	119.3	120.0	119.4	118.9	120.4
Germany	106.7	108.8	108.6	110.2	110.0	109.6	107.8	106.1	105.3	104.4
Greece	60.6	62.3	64.2	64.9	65.9	66.7	65.8	66.6	67.2	68.6
Spain	80.9	78.9	79.6	77.9	78.2	79.3	79.8	79.1	80.3	81.0
France	110.3	108.8	107.0	104.8	104.0	101.9	99.2	99.0	99.1	98.7
Ireland	76.8	80.0	83.3	87.9	93.3	94.1	103.6	105.7	112.1	118.9
Italy	105.6	105.1	102.3	103.1	103.4	103.2	102.0	103.4	102.5	101.6
Luxembourg	161.1	163.2	172.2	175.2	170.8	169.3	175.2	178.7	183.3	194.1
Netherlands	104.5	104.2	106.1	106.2	109.2	106.8	112.4	115.2	115.3	116.7
Austria	108.5	108.5	111.7	111.4	110.3	111.6	111.1	109.5	109.7	109.6
Portugal	65.0	65.9	68.4	70.2	70.6	70.6	74.5	72.8	73.8	73.6
Finland	93.7	87.3	91.5	91.4	96.9	95.3	99.3	101.2	100.8	102.9
Sweden	106.4	101.0	100.1	100.5	102.5	101.4	102.2	101.5	101.8	101.9
UK	97.2	98.2	99.3	98.9	96.4	99.1	102.5	103.4	103.9	104.5
EU15	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Source: Eurostat

Annex C2 POI – price and output indices¹

	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
EU-15					100	100	100	100	100	100
Belgium	106.2	108.7	113.2	114.6	118.3	113.3	109.5	108.3	108.4	107.5
Denmark	136.1	136.9	141.4	144.8	149.5	148.4	145.5	144.9	146.3	146.7
Germany	115.7	120.4	127.2	127.4	130.4	124.0	117.0	115.2	113.2	109.4
Greece	46.1	46.4	47.5	47.5	48.7	50.6	52.5	50.9	52.3	51.8
Spain	73.9	73.9	67.3	64.0	64.5	66.1	64.9	65.8	67.5	68.5
France	109.4	110.3	114.4	113.4	113.5	111.2	107.1	106.7	105.6	103.1
Ireland	70.8	72.6	73.9	76.0	80.0	86.0	99.4	102.8	111.8	121.2
Italy	107.1	104.0	91.9	88.8	82.9	91.4	92.3	91.5	90.4	89.6
Luxembourg	0.0	0.0	0.0	0.0	188.0	184.7	191.2	199.9	202.2	214.4
Netherlands	104.9	105.9	112.3	112.4	116.3	113.0	109.8	110.3	111.1	111.9
Austria	113.2	115.4	122.6	123.1	126.6	122.4	115.9	115.1	114.3	112.0
Portugal	42.5	47.2	45.8	45.3	47.2	48.2	48.8	49.8	51.0	51.1
Finland	128.8	103.4	89.7	97.6	109.7	106.0	108.3	110.3	109.7	112.8
Sweden	0.0	0.0	0.0	0.0	117.8	126.2	122.8	119.0	120.2	123.4
UK	93.8	89.1	87.9	89.0	84.4	86.8	103.0	106.8	109.6	116.1

Source: Eurostat

¹ Constructed as the product of Purchasing Power Parities (PPP) deflators, which remove the effect of price level differences between countries, and GDP per capita in Purchasing Power.

Annex D1 Sources of Estimates for 'Number of Professionals' - Legal Services

country	number	reference year	value given for	sources
AUT	4 592	2001	2000	1) Österreichische Rechtsanwaltskammer (ÖRAK) - member statistic (sent by ÖRAK electronically) 2) Österreichische Notariatskammer (ÖNK) - IHS questionnaire
BEL	14 888	2001	2000	1) Ordre des barreaux francophones et germanophones - telephone 2) Vereniging van Vlaamse Balies - telephone 3) Fédération Royale des Notaires de Belgique - IHS questionnaire
DNK	4 359	unclear 2000 or 2001	2000	1) Det Danske Advokatsamfund - IHS questionnaire
FIN	2 120	2002	2000	1) Suomen Asianajaliitto - website < http://www.asianajaliitto.fi >
FRA	39 940	2000	2001	1) Ministry for Justice - website < http://www.justice.gouv.fr > 2) Conseil National des Barreaux - IHS questionnaire 3) Conseil Supérieur du Notariat Français - IHS questionnaire
GER	105 724	2000	2000	1) Bundesrechtsanwaltskammer (BRAK) - website < http://www.brak.de > (BRAK-member statistic) 2) Bundesnotarkammer - website < www.bnotk.de > (BNK - member statistic)
GRC	~	~	~	~
IRL	7 476	2001	1999	1) Law Society of Ireland - IHS questionnaire 2) Bar Council - website < http://www.lawlibrary.ie >
ITA	139 500	2001	2000	1) Autorità garante della concorrenza e del mercato
LUX	830	2001	2000	1) Ordre des Avocats du Barreau de Luxembourg - IHS questionnaire 2) Chambre des Notaires du Grand-Duché de Luxembourg - telephone
NLD	13 222	2001	1999	1) Nederlandse Orde van Advocaten - IHS questionnaire 2) Koninklijke Notariële Beroepsorganisatie - IHS questionnaire
PRT	~	~	~	~
ESP	105 269	2001	1999	1) Consejo General del Notariado - questionnaire, 2) Consejo General de la Abogacía Española - website < http://www.cgae.es/ > (Censo de Colegiados 2001)
SWE	8 480	2000	2000	1) Sveriges Advokatsamfund - IHS questionnaire 2) IHS calculations
UK	111 772	2001	2000	1) General Council of the Bar - IHS questionnaire 2) Law Society England and Wales - IHS questionnaire 3) Faculty of Advocates of Scotland - telephone 4) Law Society of Scotland - IHS questionnaire 5) General Council of the Bar in Northern Ireland - IHS questionnaire

Annex D2 Sources of Estimates for 'Number of Professionals' - Accountancy Services

country	number	reference year	value given for	sources
AUT	3 068	2000	2000	1) Kammer der Wirtschaftstreuhänder - IHS questionnaire
BEL	~	~	~	~
DNK	5 077	2001	2000	1) Foreningen Registrerede Revisorer (FRR) - IHS questionnaire 2) Foreningen af Statssautoriserede Revisorer (FSR) - IHS questionnaire
FIN	3 126	2001	2000	1) Central Chamber of Commerce of Finland - IHS questionnaire 2) KHT-yhdistys, Föreningen CGR RY, Finnish Institute of Authorised Public Accountants - telephone
FRA	14 800	2002	2000	1) Conseil Supérieur de l'Ordre des Experts-Comptables (Mr. Monnot) - telephone
GER	14 078	2000	2000	1) Wirtschaftsprüferkammer - website < http://www.wpk.de/ > (WPK-member statistic)
GRC	~	~	~	~
IRL	2 696	2001	2000	1) The Institute of Chartered Accountants in Ireland - IHS questionnaire 2) IHS - estimate
ITA	88 421	2001	2000	1) Consiglio Nazionale dei Dottori Commercialisti - IHS questionnaire 2) Consiglio Nazionale dei Ragionieri Commercialisti - IHS questionnaire
LUX	346	2001	2000	1) Ordre des Experts-Comptables - telephone
NLD	6 359	2001	1999	1) Koninklijk Nederlands Instituut van Registeraccountants - website < http://www.nivra.nl/ > (NIVRA - member statistic)
PRT	~	~	~	~
ESP	5 162	1999	2001	1) Instituto de Auditores-Censores Jurados de Cuentas de Espana - telephone
SWE	4 100	2001	2000	1) Revisorsnämnden (RN) - website < http://www.revisorsnamnden.se >
UK	51 675	2001	2000	1) Accountancy Foundation Review Board 2) Institute of Chartered Accountants of England and Wales - website < http://www.icaew.co.uk > (ICAEW - member statistic) 3) The Chartered Institute of Management Accountants - telephone 4) The Chartered Institute of

Annex D3 Sources of Estimates for 'Number of Professionals' - Technical Services

country	number	reference year	value given for	sources
AUT	7 673	2000	2000	1) Bundeskammer der Architekten und Ingenieurkonsulenten - IHS questionnaire 2) Fachverband Technische Büros - Ingenieurbüros - IHS questionnaire
BEL	~	~	~	~
DNK	11 595	2000	2000	1) Danish Association of Consulting Engineers - IHS questionnaire 2) Federation of Danish Architects - IHS questionnaire
FIN	6 500	2001	2000	1) The Finnish Association of Graduate Engineers TEK - telephone 2) Finnish Association of Architects SAFA - telephone
FRA	80 300	2000	2000	1) Conseil national de l'Ordre des architectes - IHS questionnaire 2) Consiglio Nazionale degli Architetti, Pianificatori, Paesaggisti e Conservatori - website < http://www.archieuro.archiworld.it/ > 3) Conseil national des ingénieurs et des scientifiques de
GER	130 148	2001	2000	1) Bundesarchitektenkammer - IHS questionnaire 2) Bundesingenieurkammer - IHS questionnaire
GRC	~	~	~	~
IRL	7 189	2001	1999	1) Royal Institute of the Architects of Ireland - IHS questionnaire 2) The Institution of Engineers of Ireland - IHS questionnaire
ITA	131 448	2001	2000	1) Sindacato Nazionale Ingegneri Liberi - Professionisti Italiani - IHS questionnaire 2) 2) Consiglio Nazionale degli Architetti, Pianificatori, Paesaggisti e Conservatori - website < http://www.archieuro.archiworld.it/ >
LUX	789	2001	2000	1) Ordre des Architectes et Ingénieurs Conseils de Luxembourg OAI - IHS questionnaire
NLD	39 000	2001	1999	1) Koninklijk Instituut van Ingenieurs (KIVI) - telephone 2) Royal Institute of Dutch Architects - IHS questionnaire
PRT	~	~	~	~
ESP	48 723	2001	2000	1) Consejo Superior de los Colegios de Arquitectos de España (CSCAE) - IHS questionnaire 2) TECNIBERIA CIVIL - Asociación Española de Empresas Consultoras de Ingeniería Civil - IHS questionnaire
SWE	17 850	2001	2000	1) STD - Swedish Federation of Architects and Consulting Engineers - report
UK	199 039	2000	2000	1) The Engineering Council - report 2) Architects Registration Board - IHS questionnaire

Annex D4 Sources of Estimates for 'Number of Professionals' - Pharmacy Services

country	number	reference year	value given for	sources
AUT	4 581	2001	2000	1) Österreichische Apothekerkammer - IHS questionnaire
BEL	8 000	2001	1999	1) Ordre des Pharmaciens- Conseil National - telephone
DNK	1 008	2001	2000	1) Danish Ministry of the Interior and Health - letter to IHS
FIN	4 200	2002	2000	1) The Finnish Pharmacists' Association - website < http://www.farmasialiitto.fi/sflinenglish.htm >
FRA	57 650	2002	2000	1) Pharmazeutische Zeitung - website < http://www.pharmazeutische-zeitung.de/pza/2002-36/titel.htm >
GER	46 078	2000	1999	1) Bundesvereinigung Deutscher Apothekerverbände (ABDA) - IHS questionnaire
GRC	~	~	~	~
IRL	2 966	1999	1999	1) The Pharmaceutical Society of Ireland - IHS questionnaire
ITA	64 000	2000	2000	1) Federazione Ordini Farmacisti Italiani - IHS questionnaire
LUX	292	1998	2000	1) World Health Organization - Health for all - Database
NLD	2 528	1999	1998	1) World Health Organization - Health for all - Database
PRT	9 498	2001	2000	1) Ordem dos Farmacêuticos - IHS questionnaire
ESP	19 641	2000	2000	1) Consejo General de Colegios Oficiales de Farmaceuticos España - website < http://www.portalfarma.com/home.nsf >
SWE	5 000	2001	2000	1) Sveriges Farmaceutföbund - telephone
UK	31 000	2001	2000	1) Royal Pharmaceutical Society of Great Britain (RPSGB) - IHS questionnaire

Annex E1 Returns of IHS Questionnaires from member states - Summary statistics

Correspondence overview - Summary statistics		PROFESSIONAL SERVICES				other contacts	ALL QUESTIONNAIRES			Nat. Umbrellas + Ministries			national PROF. BODIES			'key' correspondents			'key' and in Case Studies		
		LEGAL	ACCOUNT- ANCY	TECHNICAL	PHARMACY		number of ALL contacts	number of replies from ALL contacts	Return in % per member state {ALL}	Number of nat. umbrell as / minist- ries	Replies from nat. umbrell as / minist- ries	Return in % per member state	Number of mem. state Prof. Bodies	Replies from mem. State Prof. Bodies	Return in % per member state	Number of contacts desig- nated as 'key'	Replies from contacts desig- nated as 'key'	Return in % per member state	Number 'key'+ case studies (prof. org. only)	Replies 'key'+ case studies (prof. org. only)	Return in % per member state
Country																					
Austria	Number of contacts	2	3	4	3		12			4			8			5			1		
	No. of quest. returned	2	1	2	1			6		0		0.0	6			5			1		
	Percentage returned	100.0	33.3	50.0	33.3			50.0					75.0			100.0			100.0		
Belgium	Number of contacts	3	3	11	3		20			5			15			8			0		
	No. of quest. returned	2	0	1	2			5		0		0.0	5			5			0		
	Percentage returned	66.7	0.0	9.1	66.7			25.0				0.0	33.3			62.5			0		
Denmark	Number of contacts	2	3	7	5		17			9			8			7			1		
	No. of quest. returned	2	2	4	3			11		4		44.4	7			7			1		
	Percentage returned	100.0	66.7	57.1	60.0			64.7					87.5			100.0			100.0		
Finland	Number of contacts	1	2	5	8		16			6			10			5			2		
	No. of quest. returned	1	1	2	2			6		1		16.7	5			3			0		
	Percentage returned	100.0	50.0	40.0	25.0			37.5					50.0			60.0			0.0		
France	Number of contacts	8	3	6	9		26			5			21			6			5		
	No. of quest. returned	2	1	2	0			5		1		20.0	4			4			4		
	Percentage returned	25.0	33.3	33.3	0.0			19.2					19.0			66.7			80.0		
Germany	Number of contacts	5	5	12	3	1	26			6			20			7			4		
	No. of quest. returned	4	5	2	1	1		13		1		16.7	12			7			4		
	Percentage returned	80.0	100.0	16.7	33.3			50.0					60.0			100.0			100.0		
Greece	Number of contacts	2	2	5	2		11			7			4			6			0		
	No. of quest. returned	1	1	1	1			4		1		14.3	3			3			0		
	Percentage returned	50.0	50.0	20.0	50.0			36.4					75.0			50.0			0		
Ireland	Number of contacts	3	3	7	3		16			5			11			8			1		
	No. of quest. returned	1	0	3	1			5		0		0.0	5			5			1		
	Percentage returned	33.3	0.0	42.9	33.3			31.3					45.5			62.5			100.0		
Italy	Number of contacts	5	3	6	5		19			7			12			9			5		
	No. of quest. returned	1	2	4	3			10		1		14.3	9			7			3		
	Percentage returned	20.0	66.7	66.7	60.0			52.6					75.0			77.8			60.0		
Luxembourg	Number of contacts	3	2	4	2		11			3			8			7			0		
	No. of quest. returned	1	1	2	0			4		0		0.0	4			4			0		
	Percentage returned	33.3	50.0	50.0	0.0			36.4					50.0			57.1			0		
Netherlands	Number of contacts	2	3	7	4		16			6			10			7			2		
	No. of quest. returned	2	0	2	2			6		1		16.7	5			5			0		
	Percentage returned	100.0	0.0	28.6	50.0			37.5					50.0			71.4			0.0		
Portugal	Number of contacts	3	1	5	10		19			5			14			6			1		
	No. of quest. returned	0	1	1	1			3		0		0.0	3			3			1		
	Percentage returned	0.0	100.0	20.0	10.0			15.8					21.4			50.0			100.0		
Spain	Number of contacts	2	2	6	3		13			5			8			7			2		
	No. of quest. returned	1	2	2	0			5		0		0.0	5			5			2		
	Percentage returned	50.0	100.0	33.3	0.0			38.5					62.5			71.4			100.0		
Sweden	Number of contacts	1	3	7	5		16			4			12			5			1		
	No. of quest. returned	1	0	2	2			5		1		25.0	4			3			1		
	Percentage returned	100.0	0.0	28.6	40.0			31.3					33.3			60.0			100.0		
U.K. Eng/Wal.	Number of contacts	4	7	17	4		32			6			26			12			3		
	No. of quest. returned	3	5	6	1			15		0		0.0	15			12			3		
	Percentage returned	75.0	71.4	35.3	25.0			46.9					57.7			100.0			100.0		
U.K. Scotland	Number of contacts	3	2	8	2		15			0			15			3			2		
	No. of quest. returned	2	0	1	0			3		0		0.0	3			3			2		
	Percentage returned	66.7	0.0	12.5	0.0			20.0					20.0			100.0			100.0		
U.K. NI	Number of contacts	2	1	3	1		7			0			7			2			2		
	No. of quest. returned	2	0	0	0			2		0		0.0	2			2			2		
	Percentage returned	100.0	0.0	0.0	0.0			28.6					28.6			100.0			100.0		
summary statistics	Number of contacts	54	49	125	82		292			83			209			110			32		
	No. of quest. returned	28	22	37	20			108		11		13.3	97			83			25		
	Percentage returned	51.9	44.9	29.6	24.4			37.0					46.4			75.5			78.1		
European umbrellas	Number of contacts	3	5	5	0		13														
	No. of quest. returned	0	0	1	0			1													
	Percentage returned	0.0	0.0	20.0	0.0			7.7													

NOTE: Shaded fields denote Case Studies

Annex E2 Synopsis of IHS Questionnaire returns from professional bodies - for Case Study countries/professions¹

Pro- fession- al field	Country	Contacts	re- plied	part 1	part 2	part 3		
						number of mem- bers or profs.	Other data	All data
Legal Services	Denmark	Det Danske Advokatsamfund	✓	✓	✓	✓	✓	
	Germany	Bundesrechtsanwaltskammer	✓	✓	✓	✓	✓	✓
		Deutscher Anwaltverein e. V.	✓	✓	✓	✓		
		Bundesnotarkammer	✓	✓	✓	✓		
		Deutscher Notarverein						
		Landesnotarkammer Bayern	✓	✓	✓	✓	✓	
	U.K. England/Wales	General Council of the Bar	✓	✓	✓	✓		
		The Law Society	✓	✓		✓	✓	✓
		The Faculty Office of the Archbishop of Canterbury	✓	✓	✓	✓		
		Scrivener's Company (London Notaries)						
	U.K. Scotland	Faculty of Advocates	✓	✓	✓	✓	✓	
		The Law Society of Scotland	✓	✓	✓	✓	✓	
		Society of Solicitor Advocates						
	U.K. North. Ireland	General Council of the Bar of Northern Ireland	✓	✓	✓	✓	✓	
		Law Society of Northern Ireland	✓	✓	✓	✓	✓	✓
	Italy	Consiglio Nazionale Forense						
		Consiglio dell'Ordine degli Avvocati e Procuratori di Roma						
		Consiglio dell'Ordine degli Avvocati e Procuratori di Milano						
		Consiglio Dell'Ordine degli Avvocati e Procuratori di Napoli						
		Consiglio Nazionale del Notariato	✓	✓	✓	✓	✓	✓
	France	Barreau de Paris						
		Conférence des Batonniers						
		Association française des Avocats Conseils d'Entreprise						
		Confederation Nationale des Avocats						
		Fédération Nationale des Unions de Jeunes Avocats						
		Syndicat des Avocats de France						
		Conseil National des Barreaux	✓	✓	✓	✓	✓	
		Conseil Supérieur du Notariat Français	✓	✓	✓	✓	✓	✓
Account- ancy	Netherlands	Koninklijk Nederlands Instituut van Registeraccountants						
		De Nederlandse Orde van Belastingadviseurs						
		De Nederlandse Federatie van Belastingadviseurs						
	Germany	Wirtschaftsprüferkammer	✓	✓	✓	✓	✓	
		Institut der Wirtschaftsprüfer in Deutschland	✓	✓	✓	✓	✓	
		Bundesverband Deutscher Unternehmensberater BDU e.V.	✓	✓	✓	✓	✓	
		Bundessteuerberaterkammer	✓	✓	✓	✓	✓	✓
		Der Deutsche Steuerberaterverband	✓	✓	✓	✓	✓	
	France	Conseil Supérieur de l'Ordre des Experts-Comptables	✓	✓	✓	✓	✓	✓
		Institut Français des Experts Comptables (IFEC)						
		La Compagnie Nationale des Commissaires aux Comptes						
	Italy	Consiglio Nazionale dei Dottori Commercialisti	✓	✓	✓	✓	✓	
		Consiglio Nazionale dei Ragionieri Commercialisti ed Economisti d'impresa	✓	✓	✓	✓		
		Associazione Nazionale Tributaristi Italiani						

¹ Parts of Questionnaire: Part 1- current regulations; Part 2 – recent changes in regulation; Part 3 – structure data etc.

Annex E2 (cont'd) Synopsis of IHS Questionnaire returns from professional bodies - for Case Study countries/professions²

Pro- fession- al field	Country	Contacts	re- plied	part 1	part 2	part 3		
						number of mem- bers or profs.	Other data	All data
Technical services	Austria	Bundeskammer der Architekten und Ingenieurkonsulenten	✓	✓	✓	✓		
		Fachverband Technische Büros - Ingenieurbüros	✓	✓	✓	✓		
		Verband Österreichischer Ingenieure						
		Österreichischer Ingenieur- und Architekten-Verein						
	Spain	Consejo Superior de los Colegios de Arquitectos de España CSCAE	✓	✓	✓	✓		
		Asociación Española de Consultores en Ingeniería y Organización						
		Colegio de Ingenieros de Caminos, Canales y Puertos						
		TECNIBERIA CIVIL - Asoc. Espanola de Empresas Consultoras de Ingeniería Civil	✓	✓	✓	✓	✓	✓
		Instituto de la Ingeniería de España						
	Finland	Finnish Association of Architects SAFA						
		Finnish Association of Consulting Firms	✓	✓	✓	✓*	✓	
		The Finnish Association of Graduate Engineers TEK	✓	✓				
		The Association of Finnish Civil Engineers						
	France	Conseil national de l'Ordre des architectes	✓	✓	✓	✓		
		Union Nationale des Syndicats Français d'Architectes UNSFA						
		Chambre des Ingénieurs-Conseils de France						
		Syntec-Ingénierie						
		Conseil national des ingénieurs et des scientifiques de France						
		Ordre des géomètres-experts - Secrétaire Général	✓	✓	✓	✓	✓	
Pharma-cies	Germany	ABDA, Bundesvereinigung Deutscher Apothekerverbände	✓	✓	✓	✓	✓	✓
	Sweden	Apoteket AB						
		Sveriges Farmaceutvörbund	✓	✓		✓	✓	
		Socialstyrelsen - National Board of Health and Welfare (Leif Gudmundson)	✓	✓	✓			
		Ministry of Health and Social Affairs (Mr Lars Hedengran)						
	Ireland	The Pharmaceutical Society of Ireland	✓	✓	✓	✓	✓	
		Hospital Pharmacists Association - Ireland						
		Irish Pharmaceutical Union						
	Portugal	Associação Nacional das Farmácias						
		Sindicato Nacional dos Farmacêuticos						
		Ordem dos Farmacêuticos	✓	✓	✓	✓		
		Associação dos Farmacêuticos Católicos						
		Associação Portuguesa dos Farmacêuticos Hospitalares - APFH						
		Associação Portuguesa dos Jovens Farmacêuticos - APJF						
		Instituto Nacional da Farmácia e do Medicamento						

* members are industrial firms (not individuals)

² Parts of Questionnaire: Part 1- current regulations; Part 2 – recent changes in regulation; Part 3 – structure data etc.

Annex E3 - IHS Questionnaire

Survey Questionnaire “Professional Services”

These data sheets may be filled in ‘electronically’. For this purpose two types of grey input-boxes are provided:

- square click-boxes (☐). Click as appropriate to reply “yes” or “no” to questions.
- rectangular text-boxes (). Fill in if question elicits a response of a number, a name or a few words or sentences. The size of the box depends on the amount of text-input.

Part I. INFORMATION ON PROFESSIONAL REGULATIONS

1. General Information

1.1. Professional Field

(please choose)

Accountancy Services	<input type="checkbox"/>
Legal Services	<input type="checkbox"/>
Architectural Services	<input type="checkbox"/>
Engineering Services	<input type="checkbox"/>
Pharmacists	<input type="checkbox"/>

1.2. Name of Profession

(please fill in)

Official Name:	
English Name (where appropriate)	

1.3. This Data Sheet was filled in by ...

Name:	
Organisation and Position:	
Postal Address	
Street name and No.:	
City and Postal Code:	
Country:	
E-Mail Address:	
Tel. Nr.:	
Fax. Nr.:	

2. Organisational Characteristics of the Profession

2.1. The following is true for the main organisational structure of the profession...(see Note 1)

(please choose one)

Licensing and compulsory membership in a professional association	<input type="checkbox"/>
Licensing without compulsory membership in a professional association.	<input type="checkbox"/>
No compulsory licensing and voluntary membership in a professional association (=certification).	<input type="checkbox"/>
No compulsory licensing nor voluntary membership in a professional association (=certification).	<input type="checkbox"/>

2.2. Regulations are created ...

(please choose one)

exclusively by public authorities	<input type="checkbox"/>
exclusively by the responsible professional association	<input type="checkbox"/>
by public authorities and by the professional association	<input type="checkbox"/>

2.3. The implementation of the regulations is organised and controlled...

exclusively by public authorities	<input type="checkbox"/>
exclusively by the responsible professional association	<input type="checkbox"/>
by public authorities and by the professional association	<input type="checkbox"/>

2.4. Disciplinary sanctions for failure to respect these regulations are decided...

exclusively by public authorities	<input type="checkbox"/>
exclusively by the responsible professional association	<input type="checkbox"/>
by public authorities and by the professional association	<input type="checkbox"/>
there are no such sanctions	<input type="checkbox"/>

3. Market Entry Regulations

	Yes	No
3.1. Are there specific regulations on access to the profession / gaining a professional title?	<input type="checkbox"/>	<input type="checkbox"/>

	Yes	No
3.2. Are there specific regulations on access to the professional market / tasks or services offered exclusively by licensed professionals	<input type="checkbox"/>	<input type="checkbox"/>
if "no" go to question 3.4.		

3.3. a. Please list (up to ten) services that your profession has a **exclusive** right to offer.

Type of exclusive service

1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	

3.3. b. Please list (up to ten) services that **your profession and other professions** have the right to provide, and name these other professions.

Type of service	This type of service may also be offered by (please fill in name of profession/s)	
1.	1.	
2.	2.	
3.	3.	
4.	4.	
5.	5.	
6.	6.	
7.	7.	
8.	8.	
9.	9.	
10.	10.	

	Yes	No
3.4. Is a University Degree a necessary precondition to enter the profession?	<input type="checkbox"/>	<input type="checkbox"/>

if "yes", which degree and what is the minimum duration of study:

name of degree
years (please give exact information)

	Yes	No
3.5. Is there any other higher education qualification enabling application for entrance to the profession?	<input type="checkbox"/>	<input type="checkbox"/>

if "yes", of what duration:

name of qualification
years (please give exact information)

	Yes	No
3.6. Are there requirements in regard of relevant practice in order to become a full member of the profession?	<input type="checkbox"/>	<input type="checkbox"/>

if "yes", of what duration:

years (please give exact information)

	Yes	No
3.7. Does there exist a requirement to pass one or more special professional exams in order to become a full member of the profession and offer services that are restricted to the profession?	<input type="checkbox"/>	<input type="checkbox"/>

if "yes", how many?

(please fill in the number and names)

	Yes	No
3.8. Is compulsory membership in a professional association required in order to become a full member of the profession and offer services that are restricted to the profession?	<input type="checkbox"/>	<input type="checkbox"/>
if "yes": are there more than one such professional organisations for this profession?	<input type="checkbox"/>	<input type="checkbox"/>

if "yes", how many?

(please fill in the number and names)

	Yes	No
3.9. Is the establishment of a business in the profession restricted to specific forms of business (such as limited liability partnerships or public companies)?	<input type="checkbox"/>	<input type="checkbox"/>
if "yes": please click on the kinds of business structures which are not permitted:		
Sole practitioners	<input type="checkbox"/>	
Limited Liability Partnerships	<input type="checkbox"/>	
Public limited companies	<input type="checkbox"/>	
Private company	<input type="checkbox"/>	
Other, (<i>please name</i>)		

	Yes	No
3.10. Is the establishment of a business in the profession restricted by quotas/economic needs tests? (see Note 2)	<input type="checkbox"/>	<input type="checkbox"/>

	Yes	No
3.11. Are there regulations on compulsory professional indemnity insurance?	<input type="checkbox"/>	<input type="checkbox"/>
if "yes": what is the minimum amount for which professionals must be insured (please fill in EUR)		
per case		
per business		

4. Regulations on market behaviour

	Yes	No
4.1. Are there special regulations for the fees/prices for services the profession is offering?	<input type="checkbox"/>	<input type="checkbox"/>
if "no" go to question 4.3.		

4.2. Of what kind are these regulations? (please choose one)

binding minimum prices for all kinds of services	<input type="checkbox"/>
binding maximum prices for all kinds of services	<input type="checkbox"/>
binding minimum prices for some kinds of services	<input type="checkbox"/>
binding maximum prices for some kinds of services	<input type="checkbox"/>
non-binding recommended prices for all kinds of services	<input type="checkbox"/>
non-binding recommended prices for some kinds of services	<input type="checkbox"/>
other, (<i>please describe</i>):	

	Yes	No
4.2. a. Are these prices/recommendations always respected in practice?	<input type="checkbox"/>	<input type="checkbox"/>
	Higher	Lower
If "no", are real prices higher or lower, on average?	<input type="checkbox"/>	<input type="checkbox"/>

	Yes	No
4.2. b. Are there any restrictions on particular pricing arrangements (e.g. contingency fees)?	<input type="checkbox"/>	<input type="checkbox"/>
If "yes", please specify:		

	Yes	No
4.3. Are there special regulations on advertising and marketing?	<input type="checkbox"/>	<input type="checkbox"/>
if "no" go to question 4.5.		

4.4. Of what kind are these regulations?

all forms of advertising are strictly forbidden,	<input type="checkbox"/>
most forms of advertising are forbidden	<input type="checkbox"/>
some forms of advertising are forbidden, these being:	<input type="checkbox"/>
direct mailing	<input type="checkbox"/>
price advertising (general)	<input type="checkbox"/>
comparative price advertising	<input type="checkbox"/>
other (<i>please fill in</i>):	
1.	
2.	
3.	

	Yes	No
4.5. Are there special regulations on location and diversification?	<input type="checkbox"/>	<input type="checkbox"/>
if "no" go to question 4.7.		

4.6. Of what kind are these regulations?

geographical restrictions on offering services	<input type="checkbox"/>
restrictions on establishing branch offices	<input type="checkbox"/>
other, (<i>please describe</i>):	

	Yes	No
4.7. Are there special regulations on interprofessional co-operation?	<input type="checkbox"/>	<input type="checkbox"/>
if "no" go to question 4.9.		

4.8. Of what kind are these regulations?

interprofessional co-operation of any form is generally forbidden.	<input type="checkbox"/>
interprofessional co-operation only in the form of incorporation is generally forbidden.	<input type="checkbox"/>
interprofessional co-operation only with some comparable licensed professions is allowed in various commercial forms (incl. incorporation).	<input type="checkbox"/>
interprofessional co-operation in the form of incorporation is allowed only with comparable licensed professions, incorporation is forbidden.	<input type="checkbox"/>

If other circumstances pertain, please describe briefly:

	Yes	No
4.9. Is continuing education an obligation to the members of the profession?	<input type="checkbox"/>	<input type="checkbox"/>

if "yes": To what extent and how is the continuing education organised and controlled?

Please describe briefly:

	Yes	No
4.10. Are there any regulations on specialisation in the profession (<i>for example see Note 3</i>)	<input type="checkbox"/>	<input type="checkbox"/>

if "yes": how is specialisation organised?; is there a right to a title for this specialisation?; may this specialisation be advertised?

Please describe briefly:

5. Other Instruments for Quality Control

	Yes	No
5.1. Do there exist special information or benchmarking systems for the profession, where information about the quality of services of individual firms is given?	<input type="checkbox"/>	<input type="checkbox"/>

if "yes": please describe briefly and give a short overview of the experience with these instruments:

	Yes	No
5.2. Are there any special (voluntary) certification systems, which coexist alongside the traditional licensing or certification model (see Note 4)	<input type="checkbox"/>	<input type="checkbox"/>

if "yes": please describe briefly and give a short overview of the experience with these instruments:

	Yes	No
5.3. Does there exist any other special instrument of quality control not mentioned in the data sheet so far?	<input type="checkbox"/>	<input type="checkbox"/>

if "yes": please describe briefly and give a short overview of the experience with these instruments:

Thank you for completing this part of the questionnaire. Now please turn to Part II.

Part II. Background to the Regulatory Framework

6. Changes, Reforms and Innovations in Regulations

Please give a brief outline of areas in which regulation of the profession has been changed in the past 10 years. If you wish to include a longer exposition, reports, or study results (e.g. Regulatory Impact Analysis), please indicate this.

Area of Regulation		Change in Regulation (and Date of Implementation)	Purpose of and Advantages / Disadvantages associated with this change
1.			
2.			
3.			
Further:			
Further:			

7. Regulations currently being reviewed

Please give a brief outline of areas in which regulation of the profession is currently being discussed. If you wish to include a longer exposition, reports, or study results, please indicate this.

Area of Regulation		Change in Regulation under Discussion (proposed by Profession?, Government?)	Proposed Purpose of and Benefits claimed for this change / Arguments against change
1.			
2.			
3.			
Further:			
Further:			

8. Reasons for Regulation/Liberalisation

You may be aware that regulations on your profession vary, sometimes greatly between EU countries. If you have any knowledge of the regulatory systems of other countries, please fill out the table below. Please give brief details of areas in which the profession is known to be differently regulated, or liberalized, (in comparison to the regulatory system elsewhere), along with a synopsis of the reasons for adopting this position. If you wish to include a longer exposition, reports, or study results, please indicate this.

Area of Regulation/Liberalisation		Reasons for Regulation	OR: Reasons for Liberalisation
1.			
2.			
3.			
Further:			
Further:			

Thank you for completing this part of the questionnaire. Now please turn to Part II

Part III. Structure and Dynamics of the Profession

9. Data Source-Year

In this section data is requested for the years 1990, 1995 and 2001. If some data for 2001 is not yet available, please give all data for 2000 and click here accordingly:

Most recent data is for:

<input type="checkbox"/>	2000 (please click if appropriate)
<input type="checkbox"/>	2001 (please click if appropriate)

If you are NOT representing a professional body, please proceed to question 12 in this section (questions concerning the profession as a whole).

10. Membership of the Professional Body

Please state, if known

	Total no. of members		
	1990	1995	2000/01
Total Membership of your Professional Body			
By membership category (name as appropriate)			

11. Stages in Access to the Profession

Please fill in the number of ...

	Total no.		
	1990	1995	2000/01
newly admitted profession members in year...			
professional trainees (in all stages of pre-Qualification)			
trainees passing Final Qualifying Examinations in year...			
trainees taking Final Qualifying Examinations in year...			
new trainee entrants in year ...			
graduates from relevant disciplines, if known (e.g. law faculties)			

12. Questions about the Profession as a whole (see Note 5)

12.1. Country of reference: _____ Country or Jurisdiction (see Note 6)

Please answer all the following questions with concrete data, or, if this is not available, with an estimate!

12.2. Professionals

	1990	1995	2000/01
	Total no.		
Total no. of professionals (regardless of professional affiliation) practicing in your country			
Percentage of above, self-employed			
Percentage of above, non-self-employed			
	Total no.		
No. of professionals with professional affiliation in your country practicing abroad			
No. of professionals with professional affiliation in your country practicing in rest of EU or EU candidate countries			
No. of professionals with professional affiliation in your country practicing in other (non EU/Candidate) countries			

12.3. Total Employment (Professionals and Non-professionals) in your country

	1990	1995	2000/01
	Total no.		
Professionals and Non-professionals (see Note 7)			
Percentage of above, full-time employment			
Percentage of above, part-time employment			

12.4. Firms Practicing the Profession in your country (see Note 8)

	1990	1995	2000/01
	Total no.		
Firms in your country			
	%		
Percentage of above, non-incorporated status			
Percentage of above, incorporated status			

12.4.1. Size of Firms (in terms of Professionals)

	1990	1995	2000/01
Percentage of Firms with...	%		
1 Qualified Professional			
2 Qualified Professionals			
3-5 Qualified Professionals			
5-30 Qualified Professionals			
more than 30 Qualified Professionals			

12.4.2. Size of Firms (in terms of Non-professional Employees)

	1990	1995	2000/01
Percentage of Firms with...	%		
0 Employees			
1-2 Employee			
3-10 Employees			
10-50 Employees			
more than 50 Employees			

12.4.3 Size of Firms (locational). (see Note 9)

	1990	1995	2000/01
Percentage of Firms with...	%		
1 Office			
2-5 Offices			
5-20 Offices			
20-50 Offices			
more than 50 Offices			

12.5. Firms with head office in your country: Cross-Border Activity

	1990	1995	2000/01
Firms with offices outwith your country in...	Total no.		
All countries			
rest of EU or EU Candidate countries			
other countries			

12.5.1. Firms with head office in other countries: country of origin (EU or non-EU) with largest number of offices registered in your country (in descending order).

	Name of the country
Country with largest no. of offices	
Country with second largest no. of offices	
Country with third largest no. of offices	

12.6. Output of the Profession

12.6.1. Please indicate the branch represented by your profession (see Note 10)

Branch (<i>Please give name</i>)	
------------------------------------	--

12.6.2. Please indicate currency used for economic data in the questions below:

	1990	1995	2000/01
Currency (see Note 11)			

12.6.3. Turnover

	1990	1995	2000/01
Turnover before tax of branch in...			
own country			
All countries abroad			
Rest of EU and EU Candidate countries			
other countries			

12.7. Concentration of the Branch (see Note 12)

	1990	1995	2000/01
	%		
Market Share of the 5 (five) largest firms			
Market Share of top 10% largest firms			
Market Share of top 30% largest firms			

12.8. Cost Structure of Firms

(Please enter best estimates)

	1990	1995	2000/01
The 'median firm' has costs broken down into...	%		
Remuneration of Professionals			
other Salaries and Wages			
Cover for Professional Insurance and Risk			
Investment in office premises			
Investment in technology (Computers)			
on-going professional education (courses)			
other costs			
Sum of above	100%	100%	100%

Thank you for completing these questions. Please send questionnaire when completed to:

'Electronic' version (preferred):	graf@ihs.ac.at
Hardcopy versions:	Institute for Advanced Studies Department of Economics and Finance 'SURVEY OF PROFESSIONAL SERVICES' (Iain Paterson) Stumpergasse 56 A-1060 Vienna Fax: ++43 - 1 - 599 91 - 555

Notes supplementary to the Survey Questionnaire

Note 1: Professional Institutional Model

„*Licensing*“ stands for cases where there is a requirement for official/legal permission to offer specific services on the market. Such licensing is typically carried out by public authorities and/or the responsible professional association. In this model only the service providers licensed in this way are allowed to use a specific professional title.

„*Certification*“ stands for cases where there is no requirement for licensing in order to offer specific services on the market, but usually where (some/not all) service providers are organized in one or more professional bodies and for this certification have to fulfil certain quality (e.g. educational) requirements. Usually only the service providers certified in this way are allowed to use a specific professional title.

Note 2: Quota Restrictions

In general terms this question deals with quantitative limits on the number of people who may enter the profession / offer the respective professional services. Such limits may be related to economic needs tests or other types of proviso.

Note 3: Specialisation

Specialisation may take different forms. A lawyer may, for example, acquire specific skills and some kind of additional certification (see note 1) in the field of marriage law. In this context “specialisation” means that the respective member of the profession not only has the advantage of acquiring specific skills but that this specialisation is recognised by some kind of institutionalised certification. This may take place within the traditional licensing or certification model adopted by the profession, or as a separately organised grouping.

Note 4: Additional Certification

For the term “certification” see note 1. This question deals with special voluntary certification that, for example, may exist in the context of further specialisation (see note 3) or international co-operation (e.g. lawyers in different countries specialising in European Community Law and setting explicit quality standards for the co-operating members).

Note 5: Questions about the Profession as a whole

Membership of a Professional Body may not necessarily extend to include all professionals in your field. Nevertheless in this section information regarding your knowledge about the profession as a *whole* is sought. Please answer with concrete data, or, where this is not available, with an estimate based on your knowledge of the profession. If you wish to draw attention explicitly to the fact that an entry to a question is an estimate, you may choose to enclose the estimate in brackets.

Note 6: Country of reference

Unless otherwise indicated questions refer to the professionals and firms in the country of your own professional body. In many cases this will be identical

Note 9: Office Locations

Location here refers access by clients/consumers. Different offices (branch offices) in the same town or city are also different locations.

Note 10: Branch

Branch refers to the economic sector activity relevant to your professional body. This may be different in different member states. For example, in some countries Notaries will be a separate branch, in others it will possibly be included under 'Lawyers'. Please name the relevant branch for your profession.

Note 11: Currency

Please indicate as appropriate e.g. BEF, DEM, GBP, EUR etc.

Note 12: Concentration

'Market Share' refers to the percentage of total branch turnover. 'Largest' firms are those with highest turnover before tax.

ON FILLING OUT THIS DOCUMENT ELECTRONICALLY IT MAY INCREASE IN LENGTH AND LOSE ITS ORIGINAL 'SHAPE'. *THIS IS NOT IMPORTANT: JUST SEND THE FILLED-IN VERSION WITHOUT REGARD TO APPEARANCE..*

Thank you for completing these questions. Please send questionnaire when completed to:

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Hardcopy versions:	Institute for Advanced Studies Department of Economics and Finance 'SURVEY OF PROFESSIONAL SERVICES' (Iain Paterson) Stumpergasse 56 A-1060 Vienna Fax: ++43 - 1 - 599 91 - 555

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Research Report

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