



# FINAL REPORT

*Data and information collection for EU dual-use  
export control policy review*

*Annexes*



Written by SIPRI and Ecorys  
6 November 2015

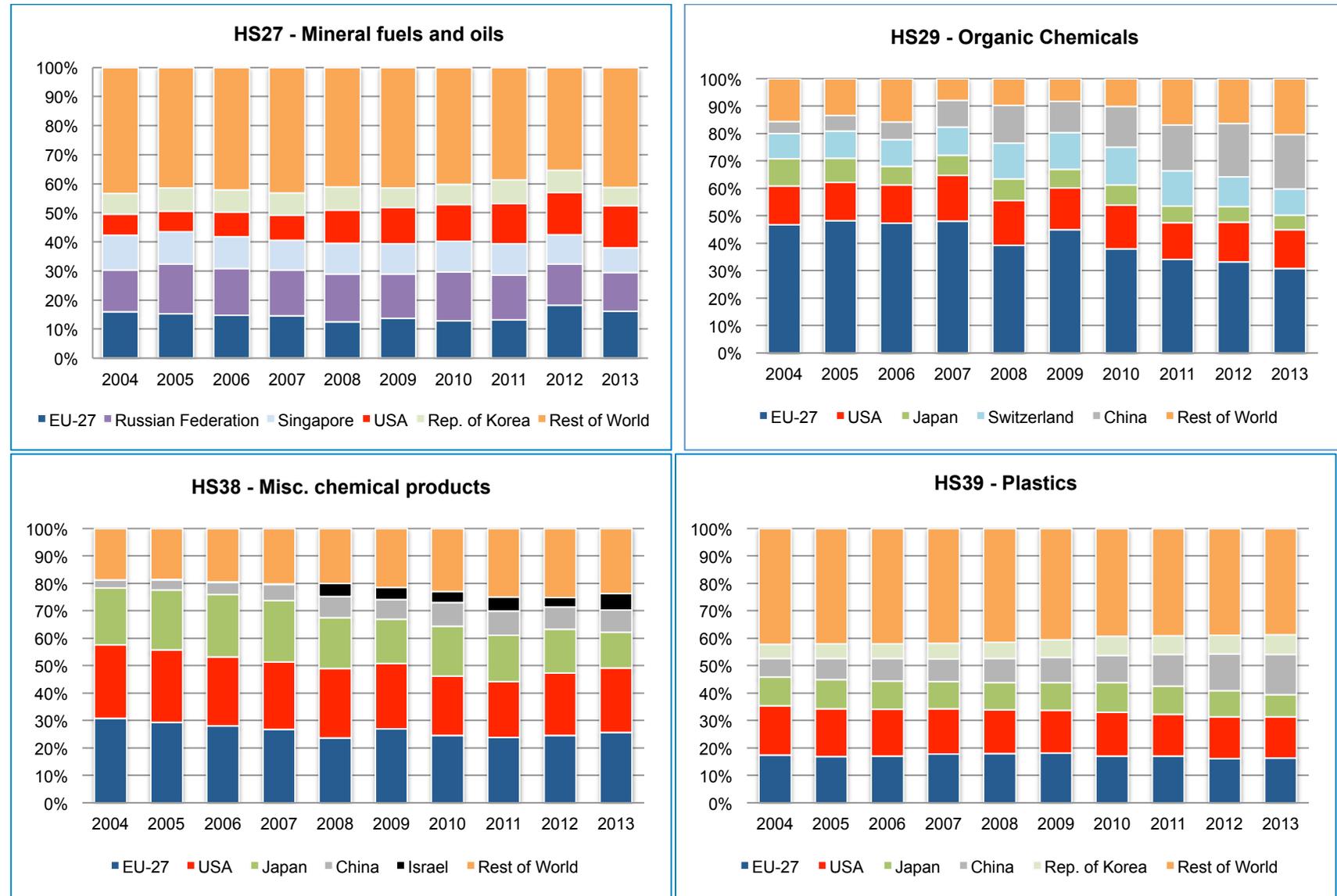


## **ANNEX 1: ADDITIONAL FIGURES AND TABLES FOR CHAPTER 4**

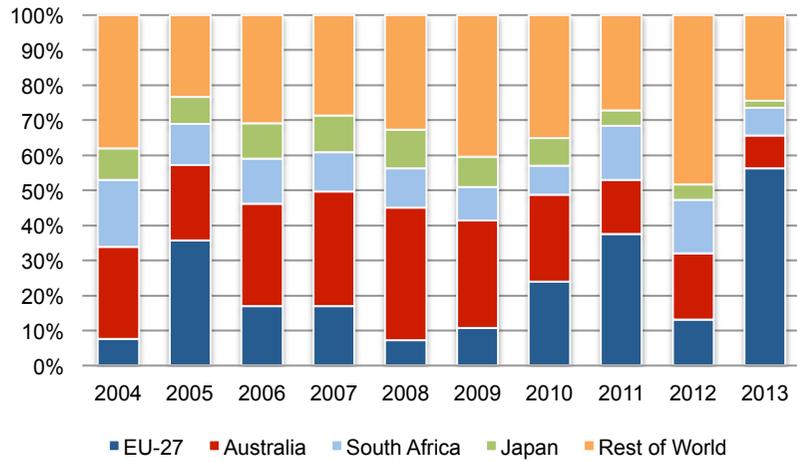
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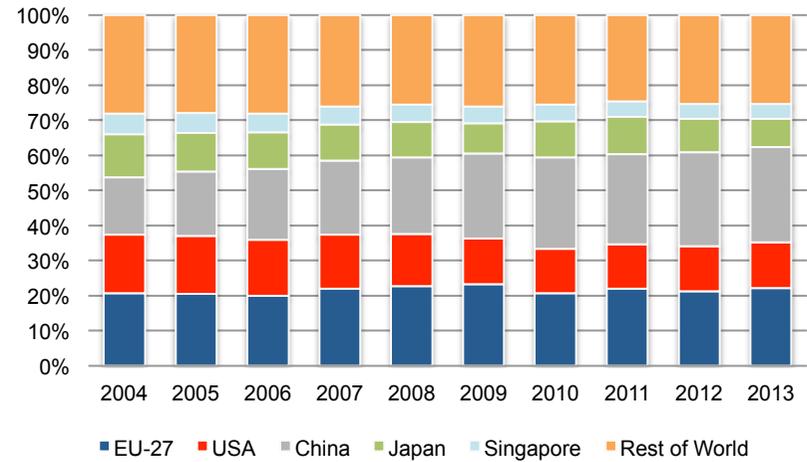
**Figure 4.8 World export market shares in selected top-10 sectors**



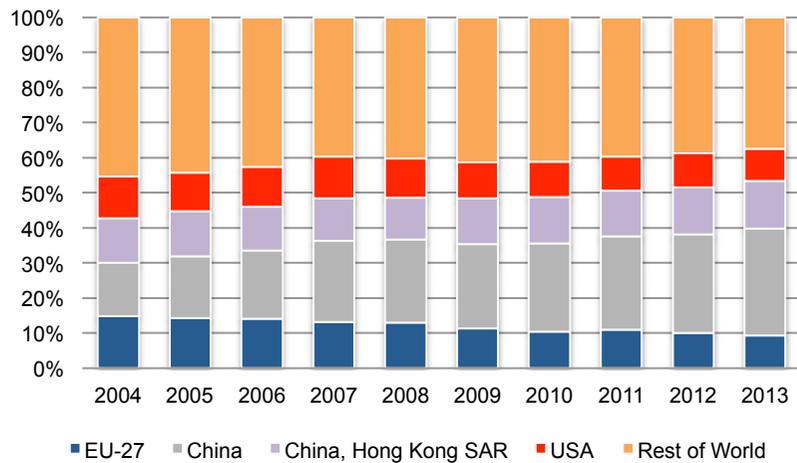
**HS71 - Pearls, precious stones and metals**



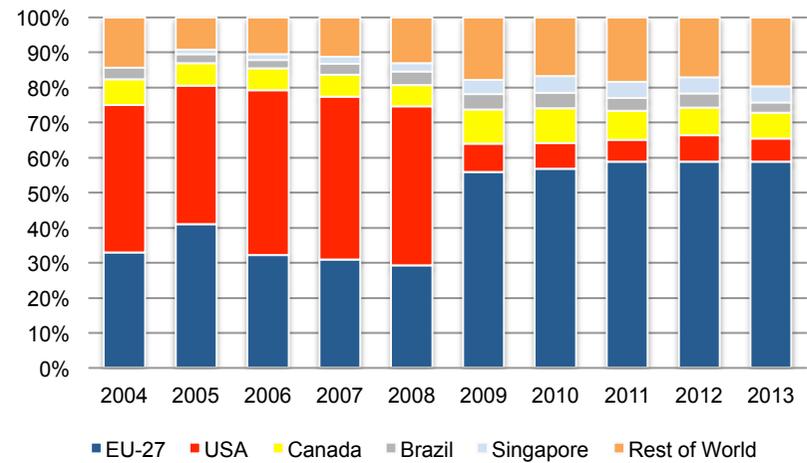
**HS84 - Nuclear reactors and machinery**



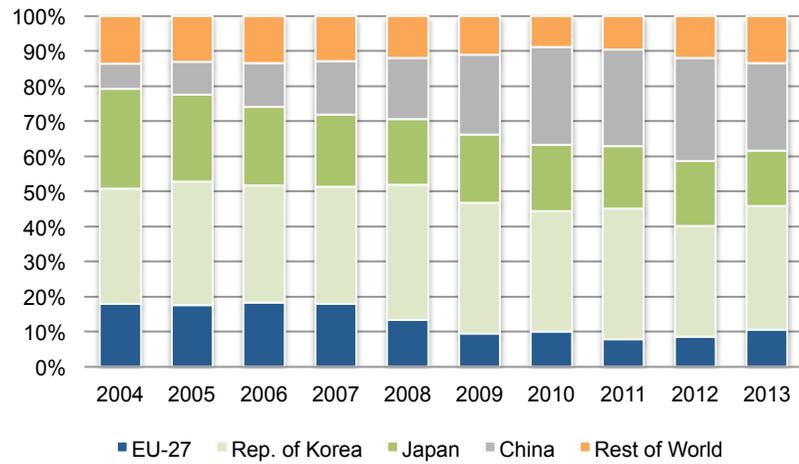
**HS85 - Electrical machinery**



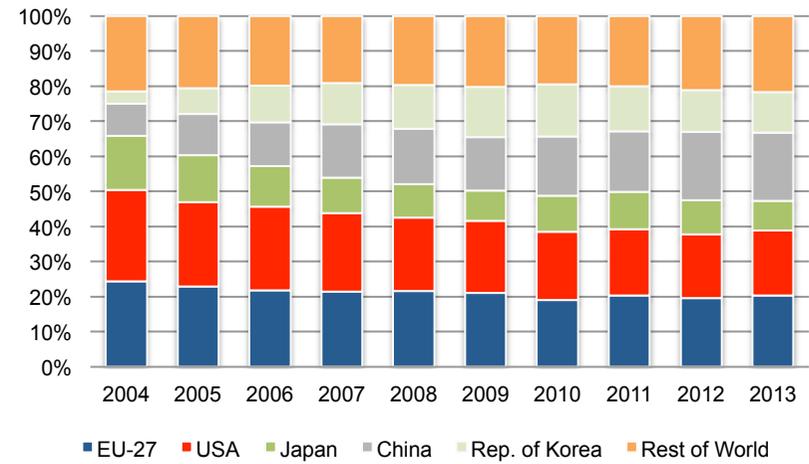
**HS88 - Aircraft and spacecraft**



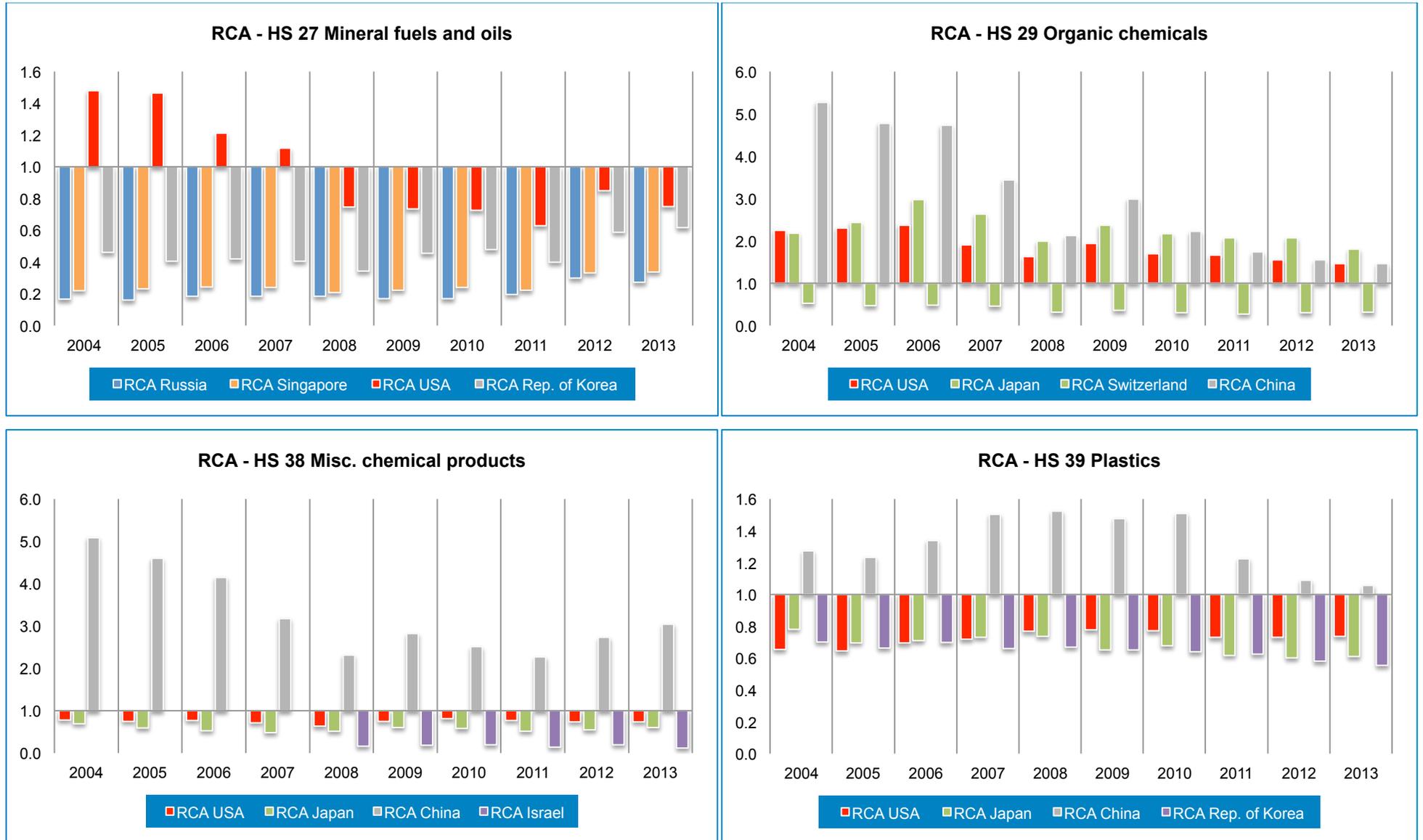
**HS99 - Ships, boats and floating structures**



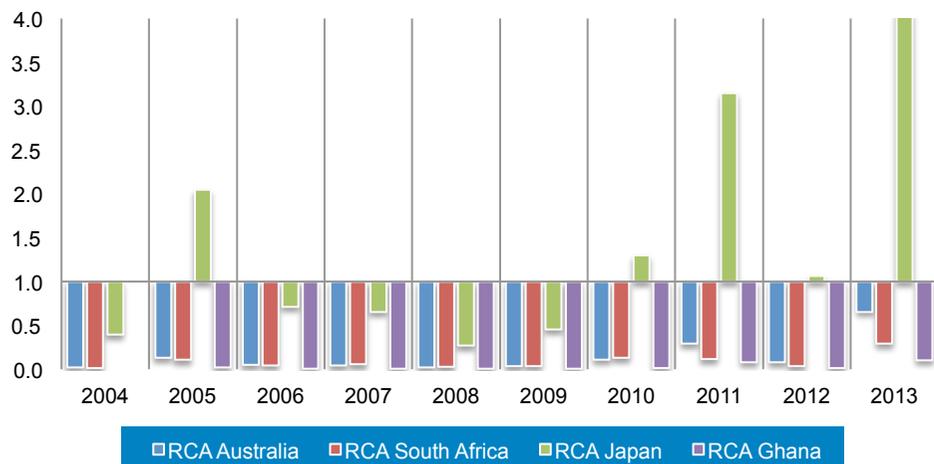
**HS90 - Optical, measuring and medical equipment**



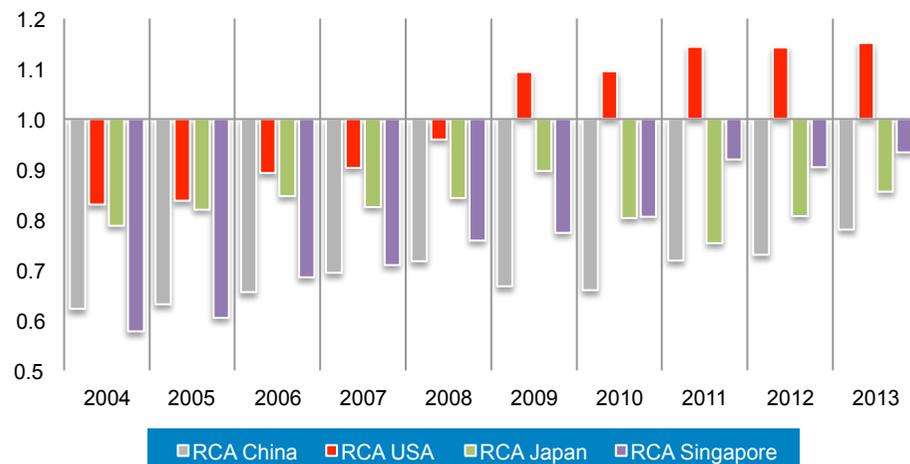
**Figure 4.9 RCA in top-10 selected sectors**



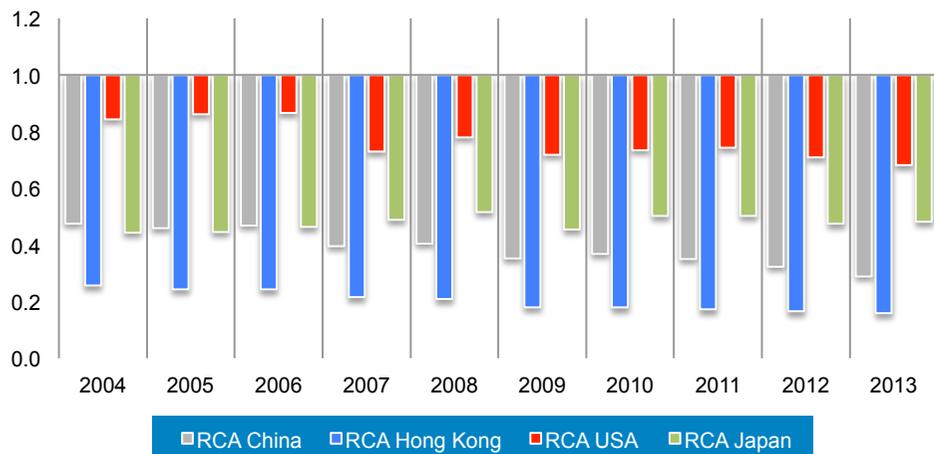
**RCA - HS 71 Pearls, precious stones and metals**



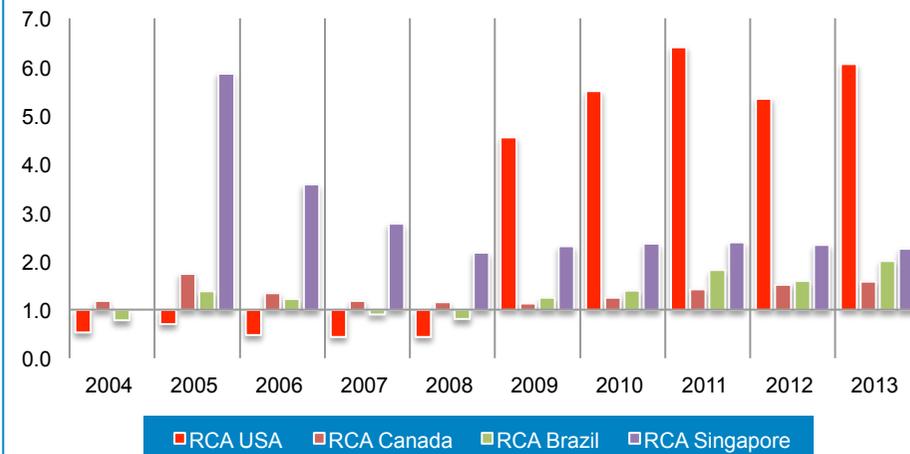
**RCA - HS 84 Nuclear reactors and machinery**



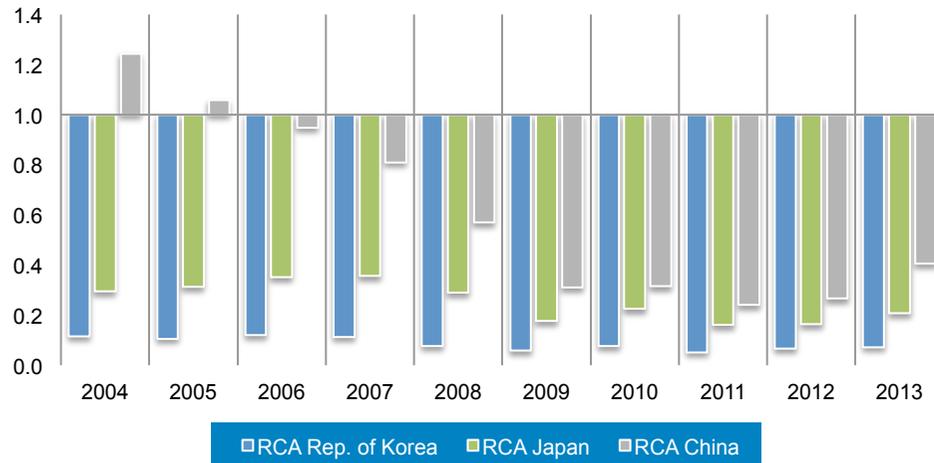
**RCA - HS 85 Electrical machinery**



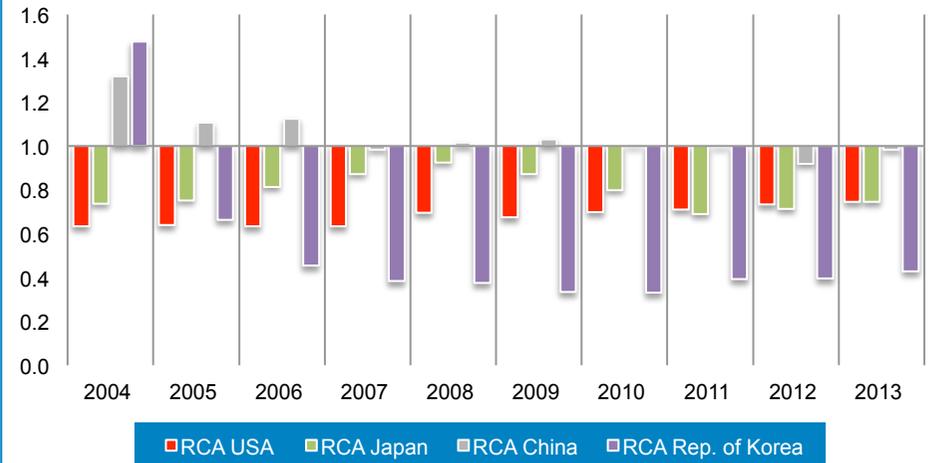
**RCA - HS 88 Aircraft and spacecraft**



**RCA - HS 89 Ships, boats and floating structures**



**RCA - HS 90 Optical and medical equipment**



**Table 4.2. Value of extra and intra EU exports (from EU-28) in dual-use related items per HS2 category, 2014**

HS-2 description				Jan.-Dec. 2014	Jan.-Dec. 2014	Jan.-Dec. 2014	
<i>Values in EUR million</i>		Nr. DU	€ AVG	Extra-EU	Intra-EU	Total	
84	Nuclear reactors, boilers, machinery and mechanical appliances; parts thereof	903	364	150,412	178,671	329,083	31.6%
85	Electrical machinery and equipment and parts thereof; sound recorders and reproducers, television image and sound recorders and reproducers, and parts and accessories of such articles	2,661	91	88,124	153,653	241,777	18.5%
88	Aircraft, spacecraft, and parts thereof	101	1,037	56,384	48,346	104,729	11.8%
90	Optical, photographic, cinematographic, measuring, checking, precision, medical or surgical instruments and apparatus; parts and accessories thereof	334	194	36,588	28,229	64,817	7.7%
27	Mineral fuels, mineral oils and products of their distillation; bituminous substances; mineral waxes	34	2,344	29,549	50,143	79,693	6.2%
71	Natural or cultured pearls, precious or semi-precious stones, precious metals, metals clad with precious metal, and articles thereof; imitation jewellery; coin	24	1,165	24,518	3,448	27,966	5.1%
39	Plastics and articles thereof	104	513	15,820	37,569	53,390	3.3%
29	Organic chemicals	98	166	8,442	7,800	16,242	1.8%
38	Miscellaneous chemical products	288	69	8,352	11,433	19,785	1.8%
89	Ships, boats and floating structures	40	255	8,157	2,047	10,204	1.7%
73	Articles of iron or steel	111	228	8,093	17,223	25,316	1.7%
72	Iron and steel	185	146	6,925	20,144	27,069	1.5%
87	Vehicles other than railway or tramway rolling-stock, and parts and accessories thereof	7	1,968	6,066	7,710	13,776	1.3%
40	Rubber and articles thereof	23	449	3,579	6,752	10,331	0.8%
76	Aluminium and articles thereof	33	483	3,456	12,477	15,933	0.7%
49	Printed books, newspapers, pictures and other products of the printing industry; manuscripts, typescripts and plans	372	21	2,935	4,969	7,904	0.6%
28	Inorganic chemicals; organic or inorganic compounds of precious metals, of rare-earth metals, of radioactive elements or of isotopes	189	34	2,503	3,998	6,501	0.5%
30	Pharmaceutical products	6	394	1,554	812	2,366	0.3%
32	Tanning or dyeing extracts; tannins and their derivatives; dyes, pigments and other colouring matter; paints and varnishes; putty and other mastics; inks	4	911	1,463	2,181	3,644	0.3%
70	Glass and glassware	63	85	1,373	3,985	5,358	0.3%
75	Nickel and articles thereof	50	60	1,356	1,660	3,016	0.3%
69	Ceramic products	74	36	1,103	1,561	2,664	0.2%
68	Articles of stone, plaster, cement, asbestos, mica or similar materials	18	183	1,099	2,187	3,286	0.2%
62	Articles of apparel and clothing accessories, not knitted or crocheted	12	286	1,086	2,342	3,428	0.2%
34	Soap, organic surface-active agents, washing preparations, lubricating preparations, artificial waxes, prepared waxes, polishing or scouring preparations, candles and similar articles, modelling pastes, "dental waxes" and dental preparations with a basis o	4	667	1,058	1,609	2,667	0.2%
81	Other base metals; cermet; articles thereof	148	18	954	1,691	2,645	0.2%
86	Railway or tramway locomotives, rolling-stock and parts thereof; railway or tramway track fixtures and fittings and parts thereof; mechanical (including electro-mechanical) traffic signalling equipment of all kinds	8	175	797	605	1,402	0.2%
94	Furniture; bedding, mattresses, mattress supports, cushions and similar stuffed furnishings; lamps and	1	1,970	700	1,270	1,970	0.1%

	lighting fittings, not elsewhere specified or included; illuminated signs, illuminated name-plates and the like; prefabricated buildings							
82	Tools, implements, cutlery, spoons and forks, of base metal; parts thereof of base metal	9	206	512	1,343	1,855	0.1%	
74	Copper and articles thereof	3	426	431	848	1,279	0.1%	
93	Arms and ammunition; parts and accessories thereof	15	44	390	267	658	0.1%	
63	Other made up textile articles; sets; worn clothing and worn textile articles; rags	2	733	375	1,091	1,466	0.1%	
54	Man-made filaments; strip and the like of man-made textile materials	7	187	357	953	1,310	0.1%	
26	Ores, slag and ash	5	73	312	54	367	0.1%	
59	Impregnated, coated, covered or laminated textile fabrics; textile articles of a kind suitable for industrial use	21	41	311	553	864	0.1%	
96	Miscellaneous manufactured articles	2	819	309	1,329	1,638	0.1%	
36	Explosives; pyrotechnic products; matches; pyrophoric alloys; certain combustible preparations	18	26	237	233	470	0.0%	
55	Man-made staple fibres	13	64	187	641	828	0.0%	
56	Wadding, felt and nonwovens; special yarns; twine, cordage, ropes and cables and articles thereof	9	36	154	166	320	0.0%	
37	Photographic or cinematographic goods	192	1	96	145	241	0.0%	
79	Zinc and articles thereof	1	620	96	524	620	0.0%	
80	Tin and articles thereof	2	163		66	260	327	0.0%
64	Footwear, gaiters and the like; parts of such articles	2	122	43	201	244	0.0%	
78	Lead and articles thereof	1	103	25	79	103	0.0%	
<b>Total</b>		<b>6,197</b>	<b>177.43</b>	<b>476,347</b>	<b>623,202</b>	<b>1,099,549</b>	<b>100%</b>	

**Table 4.5a. Dutch Customs data: share of exports requiring a licence**

HS-2	Description	Export value (€m)	Transactions	% X002 (Total)		% X002 (EUGEA)		% X002 (Non-EUGEA)	
				No.	Value	No.	Value	No.	Value
26	Ores, slag and ash.	0.04	7	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
27	Mineral fuels, mineral oils,	12,365.80	8,081	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
28	Inorganic chemicals	548.57	9,956	0.8%	77.0%	0.0%	0.0%	0.8%	77.0%
29	Organic chemicals.	330.59	5,792	1.1%	1.0%	0.0%	0.0%	1.1%	1.0%
30	Pharmaceutical products.	48.49	860	0.2%	0.0%	0.0%	0.0%	0.2%	0.0%
32	Tanning or dyeing extract,	148.35	7,047	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
34	Soap, organic surface-active agents,	74.40	10,310	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
36	Explosives; pyrotechnic products; matches	34.67	498	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
37	Photographic or cinematographic goods.	1.30	290	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
38	Miscellaneous chemical products.	879.63	43,462	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
39	Plastics and articles thereof.	3,311.17	155,225	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
40	Rubber and articles thereof.	139.66	84,665	0.0%	0.4%	0.0%	0.0%	0.0%	0.4%
49	Printed books, newspapers,	75.57	24,175	1.5%	1.2%	0.1%	0.1%	1.4%	1.1%
54	Man-made filaments.	151.18	3,650	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
55	Man-made staple fibres.	36.64	762	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
56	Wadding, felt and nonwovens; special yarn, shortened.	231.62	804	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
59	Impregnated, coated, covered or laminated textile fabrics	13.07	1,166	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
62	Articles of apparel and clothing accessories	35.50	4,085	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
63	Other made up textile articles; sets,	14.19	5,517	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
64	Footwear, gaiters and the like; parts of such articles,	1.03	198	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
68	Articles of stone, plaster, cement, asbestos, mica or similar	54.96	5,936	1.5%	4.0%	0.0%	0.0%	1.5%	4.0%
69	Ceramic products.	27.10	5,196	0.3%	0.3%	0.0%	0.0%	0.3%	0.3%
70	Glass and glassware.	66.29	5,534	0.1%	0.0%	0.0%	0.0%	0.1%	0.0%
71	Natural or cultured pearls, precious or semi-precious stones	7.34	408	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
72	Iron and steel.	198.37	8,210	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
73	Articles of iron or steel.	331.71	50,235	0.1%	0.2%	0.0%	0.0%	0.1%	0.2%
74	Copper and articles thereof	20.11	3,287	0.1%	0.0%	0.0%	0.0%	0.1%	0.0%
75	Nickel and articles thereof.	55.44	2,915	0.1%	0.0%	0.0%	0.0%	0.1%	0.0%
76	Aluminium and articles thereof	5,669.84	16,801	0.7%	0.0%	0.0%	0.0%	0.7%	0.0%

78	Lead and articles thereof	0.53	153	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
79	Zinc and articles thereof.	1.78	1,225	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
80	Tin and articles thereof.	9.61	822	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
81	Other base metals; cermets;	16.60	1,422	0.8%	0.6%	0.1%	0.0%	0.7%	0.6%
82	Tools, implements, cutlery, spoons and forks	8.17	565	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
84	Nuclear reactors, boilers, machinery, shortened.	38,941.87	1,262,481	2.0%	12.6%	0.1%	0.1%	2.0%	12.5%
85	Electrical machinery and equipment and parts thereof	10,821.77	1,131,081	10.0%	15.5%	0.5%	0.8%	9.4%	14.7%
86	Railway or tramway locomotives,	78.17	1,853	0.1%	0.3%	0.0%	0.0%	0.1%	0.3%
87	Vehicles other than railway or tramway,	9,498.97	18,285	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
88	Aircraft, spacecraft, and parts thereof.	1,854.66	41,784	1.9%	0.5%	0.0%	0.0%	1.9%	0.5%
89	Ships, boats and floating structures.	586.97	102	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
90	Optical, photographic, cinematographic instruments	4,267.91	277,911	0.7%	1.7%	0.0%	0.0%	0.7%	1.7%
93	Arms and ammunition; parts and accessories thereof.	8.05	80	1.3%	0.5%	0.0%	0.0%	1.3%	0.5%
94	Furniture; bedding, mattresses, prefabricated buildings	35.48	6,410	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
96	Miscellaneous manufactured articles.	82.51	35,468	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Total/Avg</b>		<b>91,086</b>	<b>3,244,714</b>	<b>4.4%</b>	<b>7.8%</b>	<b>0.2%</b>	<b>0.1%</b>	<b>4.2%</b>	<b>7.7%</b>

**Table 4.25b. Matching NACE Rev. 2 – HS (expanded table)**

NACE Code	Activity	Primary related HS 2-digit sector	Secondary related HS 2-digit sector
C2013	Manufacture of other inorganic basic chemicals	HS71: Pearls, precious stones and precious metals	
C2014	Manufacture of other organic basic chemicals	HS29: Organic chemicals	HS27: Mineral fuels and oils
C2016	Manufacture of plastics in primary forms	HS39: Plastics	
C2059	Manufacture of other chemical products n.e.c.	HS38: Misc. chemical products	
C2221	Manufacture of plastic plates, sheets, tubes and profiles	HS39: Plastics	
C2222	Manufacture of plastic packing goods	HS39: Plastics	
C2229	Manufacture of other plastic products	HS39: Plastics	
C2399	Manufacture of other non-metallic mineral products n.e.c.	HS38: Misc. chemical products	
C2441	Precious metals production	HS71: Pearls, precious stones and precious metals	
C2530	Manufacture of steam generators, except central heating hot water boilers	HS84: Nuclear reactors and machinery	
C2573	Manufacture of tools	HS84: Nuclear reactors and machinery	
C2599	Manufacture of other fabricated metal products n.e.c.	HS85: Electrical machinery	
C2611	Manufacture of electronic components	HS85: Electrical machinery	
C2612	Manufacture of loaded electronic boards	HS85: Electrical machinery	HS84: Nuclear reactors and machinery
C2620	Manufacture of computers and peripheral equipment	HS85: Electrical machinery	HS84: Nuclear reactors and machinery
C2630	Manufacture of communication equipment	HS85: Electrical machinery	
C2640	Manufacture of consumer electronics	HS85: Electrical machinery	
C2651	Manufacture of instruments and appliances for measuring, testing and navigation	HS90: Optical, measuring and medical equipment	HS85: Electrical machinery
C2660	Manufacture of irradiation, electromedical and electrotherapeutic equipment	HS90: Optical, measuring and medical equipment	
C2670	Manufacture of optical instruments and photographic equipment	HS90: Optical, measuring and medical equipment	HS85: Electrical machinery
C2680	Manufacture of magnetic and optical media	HS85: Electrical machinery	
C2711	Manufacture of electric motors, generators and transformers	HS85: Electrical machinery	
C2712	Manufacture of electricity distribution and control apparatus	HS85: Electrical machinery	
C2720	Manufacture of batteries and accumulators	HS85: Electrical machinery	
C2731	Manufacture of fibre optic cables	HS90: Optical, measuring and medical equipment	HS85: Electrical machinery
C2732	Manufacture of other electronic and electric wires and cables	HS85: Electrical machinery	

C2733	Manufacture of wiring devices	HS85: Electrical machinery	
C2751	Manufacture of electric domestic appliances	HS85: Electrical machinery	HS84: Nuclear reactors and machinery
C2790	Manufacture of other electrical equipment	HS85: Electrical machinery	
C2811	Manufacture of engines and turbines, except aircraft, vehicle and cycle engines	HS84: Nuclear reactors and machinery	
C2812	Manufacture of fluid power equipment	HS84: Nuclear reactors and machinery	
C2813	Manufacture of other pumps and compressors	HS84: Nuclear reactors and machinery	
C2814	Manufacture of other taps and valves	HS84: Nuclear reactors and machinery	
C2815	Manufacture of bearings, gears, gearing and driving elements	HS84: Nuclear reactors and machinery	
C2821	Manufacture of ovens, furnaces and furnace burners	HS85: Electrical machinery	HS84: Nuclear reactors and machinery
C2822	Manufacture of lifting and handling equipment	HS84: Nuclear reactors and machinery	
C2823	Manufacture of office machinery and equipment (except computers and peripheral equipment)	HS84: Nuclear reactors and machinery	
C2825	Manufacture of non-domestic cooling and ventilation equipment	HS84: Nuclear reactors and machinery	
C2829	Manufacture of other general-purpose machinery n.e.c.	HS84: Nuclear reactors and machinery	
C2830	Manufacture of agricultural and forestry machinery	HS84: Nuclear reactors and machinery	
C2841	Manufacture of metal forming machinery	HS84: Nuclear reactors and machinery	
C2849	Manufacture of other machine tools	HS85: Electrical machinery	HS84: Nuclear reactors and machinery
C2891	Manufacture of machinery for metallurgy	HS84: Nuclear reactors and machinery	
C2892	Manufacture of machinery for mining, quarrying and construction	HS84: Nuclear reactors and machinery	
C2894	Manufacture of machinery for textile, apparel and leather production	HS84: Nuclear reactors and machinery	
C2896	Manufacture of plastic and rubber machinery	HS84: Nuclear reactors and machinery	
C2899	Manufacture of other special-purpose machinery n.e.c.	HS84: Nuclear reactors and machinery	HS90: Optical, measuring and medical equipment
C3030	Manufacture of air and spacecraft and related machinery	HS88: Aircraft and spacecraft	HS84: Nuclear reactors and machinery
C3212	Manufacture of jewellery and related articles	HS71: Pearls, precious stones and precious metals	
C3250	Manufacture of medical and dental instruments and supplies	HS90: Optical, measuring and medical equipment	HS84: Nuclear reactors and machinery
C3299	Other manufacturing n.e.c.	HS90: Optical, measuring and medical equipment	

**Table 4.26 Data synthesis table**

	Total				Top 10 sectors (sorted by value of dual-use related exports)			
	2011	2012	2013	2014	2011	2012	2013	2014
EU Value of General Export Authorisations (€ m)	4,123	5,046	4,828					
EU Export licence applications (€ m)	34,211	38,675	62,283					
EU Export licence authorisations (€ m)	42,681	44,959	49,207					
Value of dual-use related exports from the EU (intra-EU) (€ m)	557,056	606,080	605,251	623,202				
Value of dual-use related exports from the EU (extra-EU) (€ m)	425,616	463,839	515,966	476,347				
Value of dual-use related exports from the EU (total) (€ m)	982,672	1,069,919	1,121,217	1,099,549				
Total EU production value (€ bn)			26.5 - 36.2*				631,152	
Number of EU employees in DU related sectors (m)					6.87	7.78		
Number of EU enterprises in DU related sectors					374,334	381,608		
EU export licence authorisations (excl. EUGEA) as % of total EU exports				1.1%				
EU export licence authorisations (excl.E001) as % of total EU exports (Versino 2015)				0.9%				
Danish export licence authorisations (incl. EUGEA, % of total exports)				0.1%				
<b>Dutch share of DU exports [%X002] in total Dutch extra-EU exports</b>				<b>2.3%</b>				
<b>(Estimated) EU share of dual-use exports in total EU (intra+extra) exports (Versino 2015)</b>				<b>3.3%</b>				
EU export licence authorisations (excl. EUGEA) as % of DU related exports				4.5%				
Dutch share of DU exports (%X002) as % of DU related exports				7.8%				
Danish share of DU exports as % of DU related exports				1.2%				
EU export licence authorisations (incl. EUGEA) as % of extra-EU DU related exports				10.5%				
Danish export licence authorisations (incl. EUGEA, % of extra-EU DU related exports)				1.2%				

\* Based on Stewart (2015) - EU Production of Dual-use Goods: A study for the JRC



## **ANNEX 2: FULL SURVEY RESULTS**

Annex 2a: Business survey

Annex 2b: Association survey

Annex 2c: Member State survey

# Export controls - Companies

Status:	<b>Closed</b>	Partial completes:	257 (47,7%)
Start date:	29-05-2015	Screened out:	0 (0%)
End date:	19-07-2015	Reached end:	282 (52,3%)
Live:	52 days	Total responded:	539
Questions:	65		

## Panel

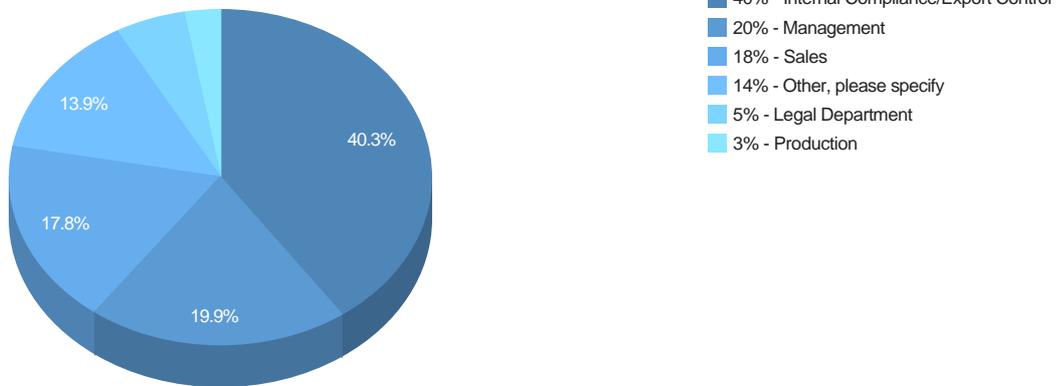
Panelist count:	132	Partial completes:	5 (45,5%)
Bounced:	5 (3,8%)	Reached end:	6 (54,5%)
Declined:	3 (2,3%)	Responses:	11 (8,3%)

## Non-panel

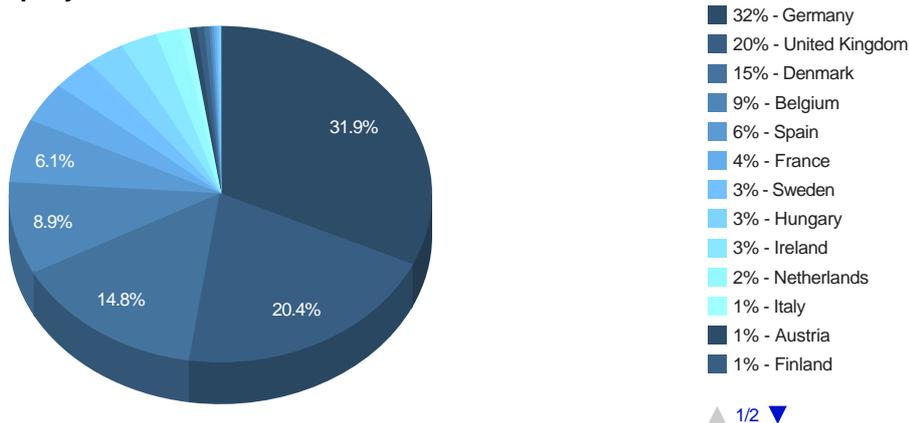
Responses:	528	Partial completes:	252 (47,7%)
Start page views:	1.897	Screened out:	0 (0%)
		Reached end:	276 (52,3%)

Company overview This section aims at clarifying the profile of EU dual-use companies and providing key data in view of the assessment of specific impacts (e.g. administrative burden, implications for SMEs).

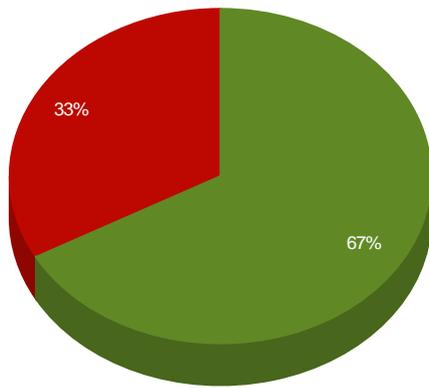
### 1. Please select the department you work in.



### 2. Where is your company located?



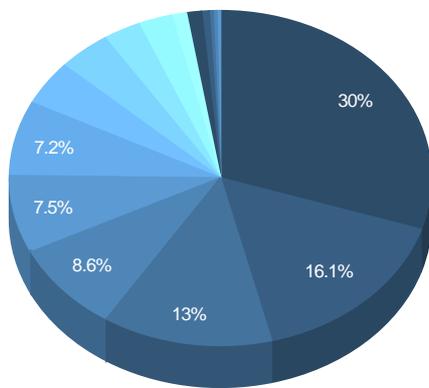
3. Is your company part of a multinational corporation?



67% - Yes  
33% - No

n=539

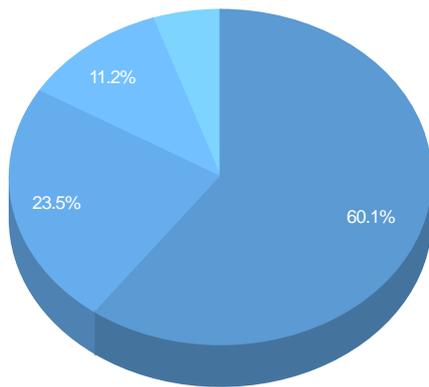
4. Where is the headquarters of your company located?



30% - Germany  
16% - United Kingdom  
13% - Denmark  
9% - Belgium  
7% - France  
7% - Sweden  
4% - Netherlands  
4% - Ireland  
3% - Spain  
3% - Hungary  
1% - Austria  
1% - Italy  
1% - Finland

n=347

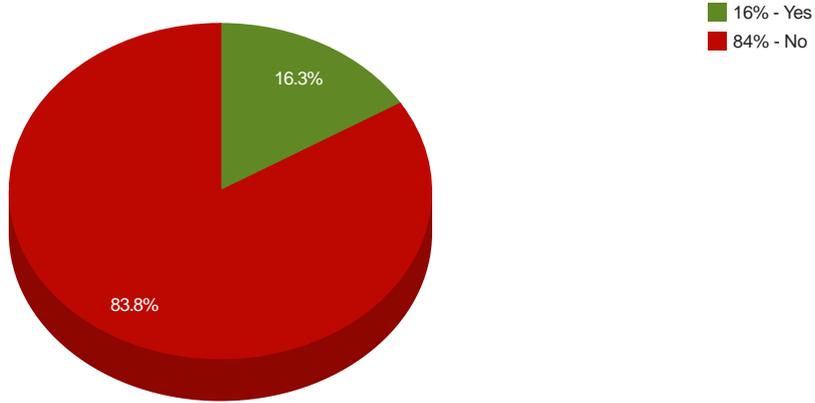
5. Following the EU definition, your company (all offices) can be classified as:



60% - Large (>=250 employees)  
23% - Medium-sized (50-249 employees)  
11% - Small (10-49 employees)  
5% - Micro (1-9 employees)

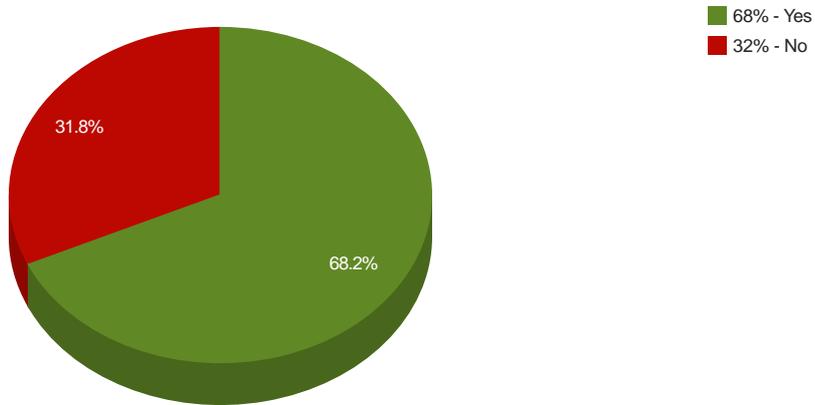
n=481

6. Does your company export military items listed in the EU Common Military list?



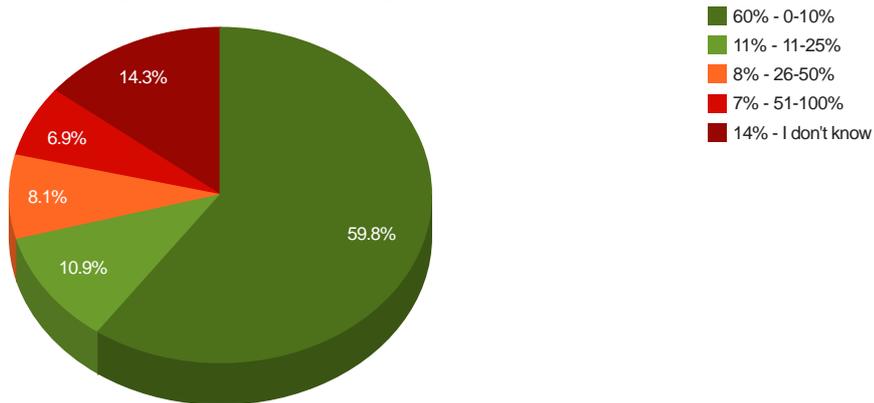
n=480

7. Does your company export dual-use items listed in Annex I to Regulation 428/2009 or products that contain dual-use items to non-EU countries?



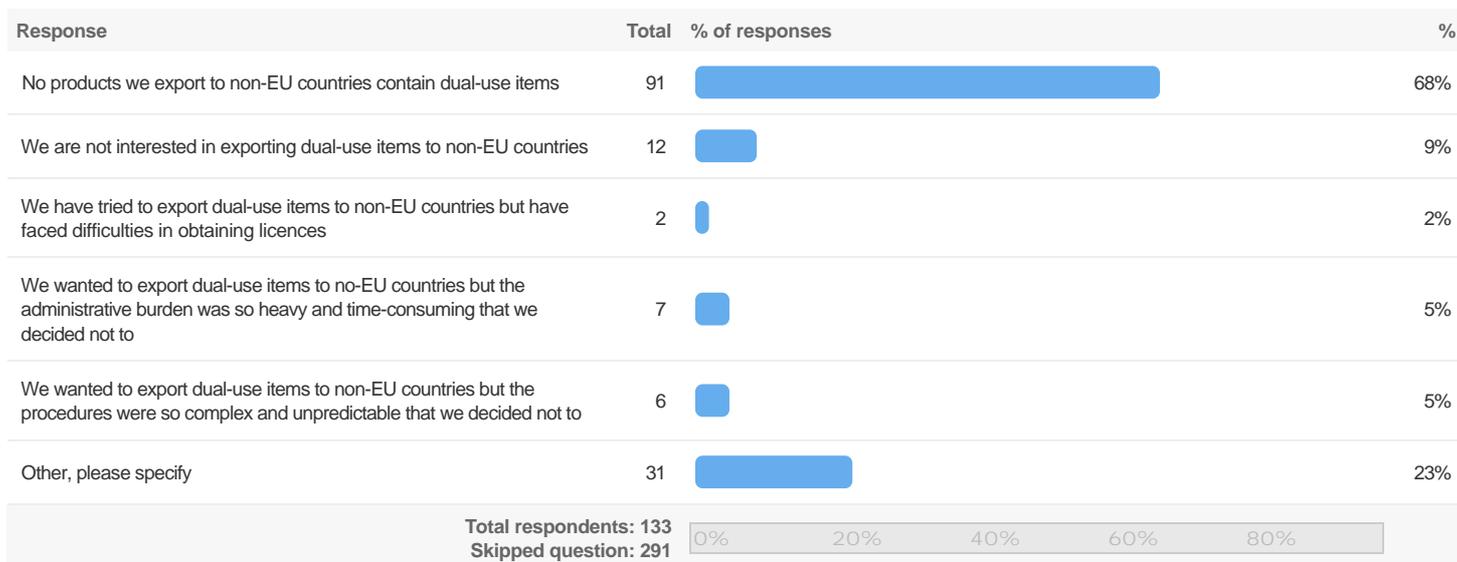
n=484

8. Could you please indicate the percentage of your company's turnover generated by the export of dual-use items to non-EU countries?



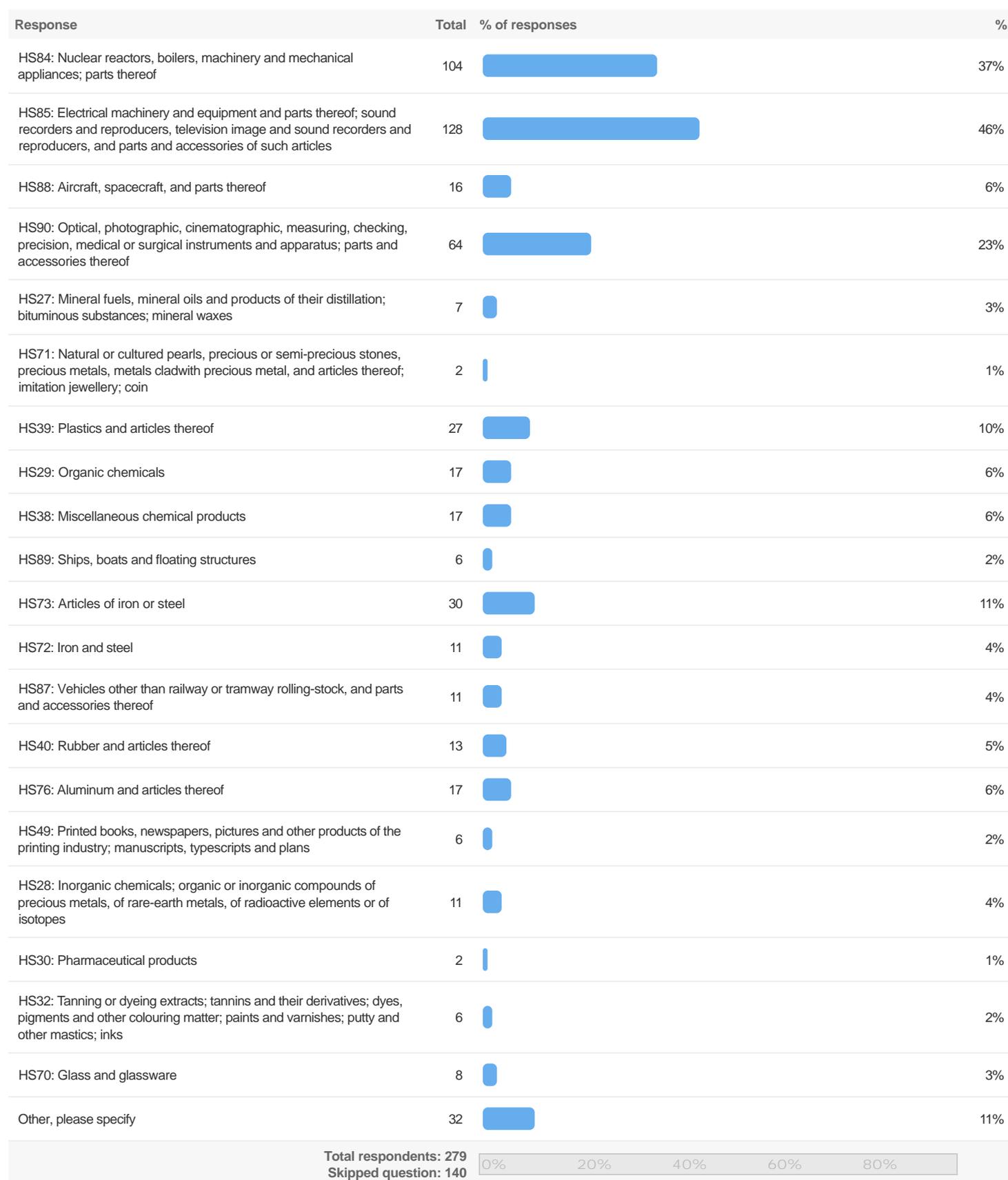
n=321

## 9. Please explain why your company doesn't export dual-use items



Categories of dual-use items and destinations This section aims at collecting information on the codification of the dual-use products exported by your company and on the most important destination countries for the export of dual-use items.

## 10. Please select the HS codes of dual-use products typically exported by your company.



11. If possible, please provide the specific HS(4 or 6-digit)/CN (8 digit) or Dual-Use Classification Number (as per Annex I to Regulation 428/2009) of the 10 dual-use products most commonly exported by your company.

Response	Total	% of total respondents	%
Open answer	192	<div style="width: 36%;"></div>	36%

00 10 1A004 1B118A 1C350 2B001a 2B116 2B350g 2B350i 39 3A001 3A225 3B001 **5A002**  
 5A002a1 5A002a1a **5D002** 5D002c1 5E002 80 **8413** 8421 8471 8473 84772000 8479 8481  
 85044090 **8517** 851762 85176200 85234025 8541 8542 90 9026 91 Buoyancy CN code codes  
 dual ECCN Foam **HS** made pumps related software Syntactic

Total respondents: 192  
 Skipped question: 227

0%

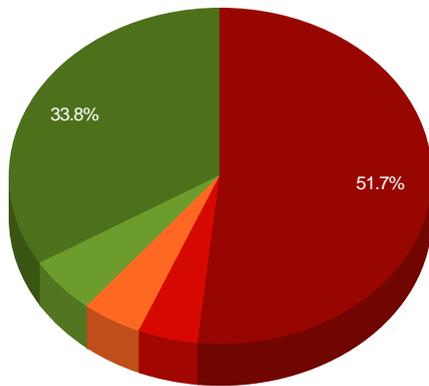
20%

40%

60%

80%

12. The EU developed a correlation table linking dual-use items (Annex I of the dual-use regulation) to custom codes (HS or CN). Please indicate to what extent t...



- 52% - More than 75% of products under the HS codes relevant to our company are not dual-use items
- 5% - Between 50-75% of products under the HS codes relevant to our company are not dual-use items
- 5% - Although the HS codes relevant to our company also include a significant share of non-dual use products (25-50%), the majority of products under the relevant codes consist of dual-use items
- 5% - The HS code relevant to our company covers to a large extent only dual use items, only a very small share of the products in this category are not dual use items (less than 25%)
- 34% - I don't know

n=240

13. If you can provide more information on which specific HS codes are particularly strong or weak in representing dual-use products, please provide this information in the box below.

Response	Total	% of total respondents	%
Open answer	38	<div style="width: 7%;"></div>	7%

00 90 classification code codes control controlled correlation dual ECCN goods Heat **HS** industrial  
 list non **products** representing software **Strong** table weak

Total respondents: 38  
 Skipped question: 336

0%

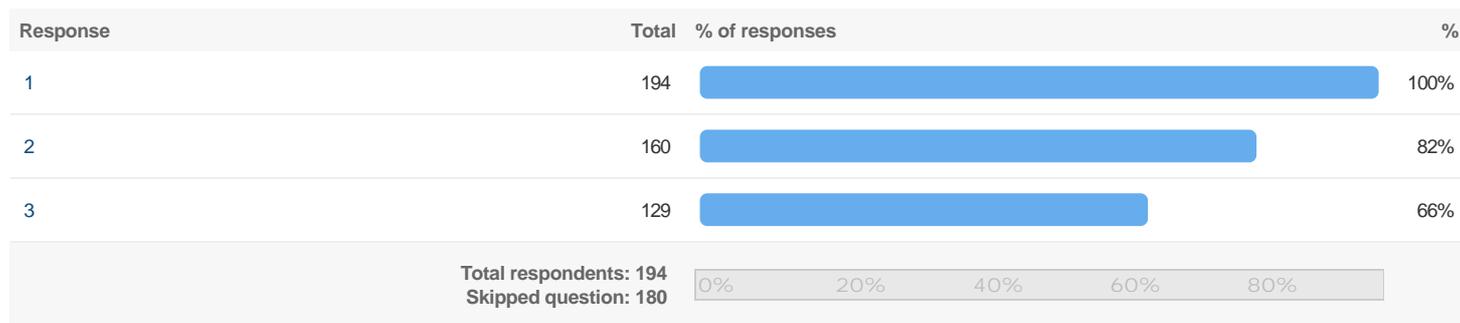
20%

40%

60%

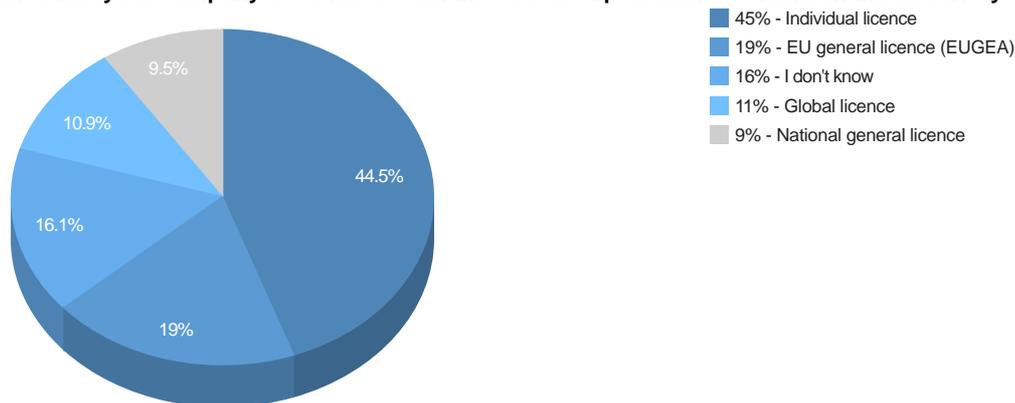
80%

**14. In terms of the value of exports, which were the most important destination countries (among non-EU countries) for the export of dual-use items (or products that contain dual-use items) during the last five years?**



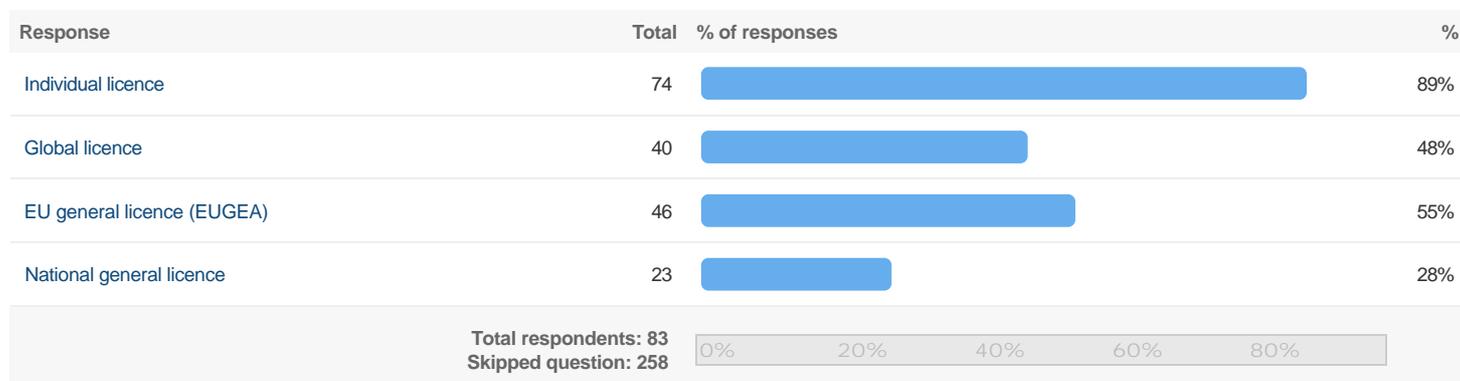
Licensing and compliance This section aims at clarifying the types of licences used for dual-use products by your company, the obtaining and managing of licences for dual-use items and the related compliance costs.

**15. Which type of licence has your company used most often in order to export dual-use items in the last five years?**



n=211

**16. Please estimate the time necessary for control of the export control process under the following modalities.**



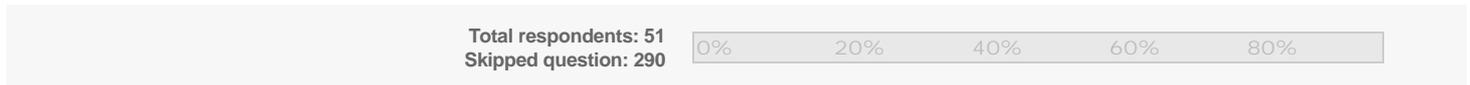
17. Please rate the efficiency of the export control process under the following modalities.



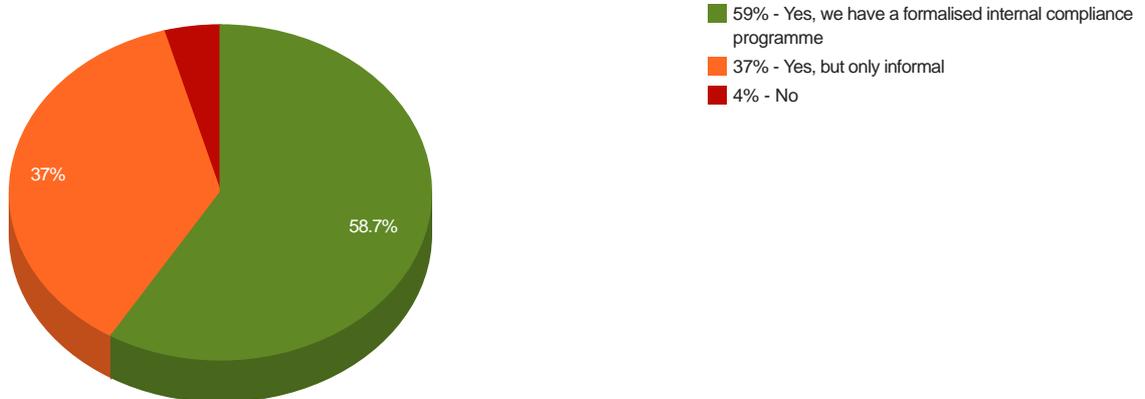
18. Additional comments:

Response	Total	% of total respondents	%
Open answer	51	<div style="width: 9%;"></div>	9%

above application apply available consuming control countries day days dual Efficiency end estimate EU  
 EU001 EUGEA export exporters exports few following general Global hours individual last  
 licence licences license long modalities months national necessary one per Please process  
 processing products question questions takes time two UGEA used week weeks working

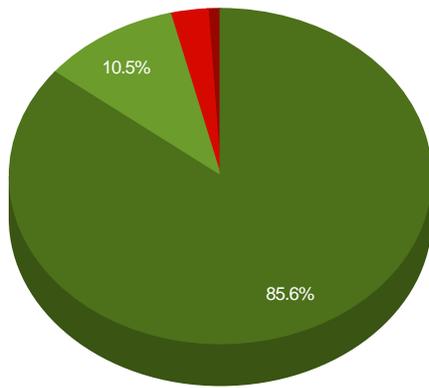


19. Does your company have an internal compliance programme in place for complying with the dual-use regulation 428/2009 (e.g. as part of your internal qualitat...)



n=208

**20. In your company, the obtaining and managing of licences for dual-use items is usually done:**



- 86% - Internally/in-house staff with dedicated persons
- 11% - Internally/in-house staff but not with dedicated persons
- 3% - Externally (lawyers, consultants etc.)
- 1% - I don't know

n=209

**21. How often did your company experience the following situations when exporting dual-use items in the last 5 years?**

Sub-questions	Resp.	% of responses	avg	med	SD
We could not obtain export licences for dual-use items	203		1.5	1	0.68
We lost a deal due to the length of time it took to obtain licences for dual-use items	202		2	2	1.04
We lost money due to the length of time it took to obtain licences for dual-use items	202		2.13	2	1.08

Average: 1,87 — Median: 2 — Standard Deviation: 0,99

- 1. Never
- 2. Only on very few occasions
- 3. Sometimes
- 4. Often
- 5. Very often

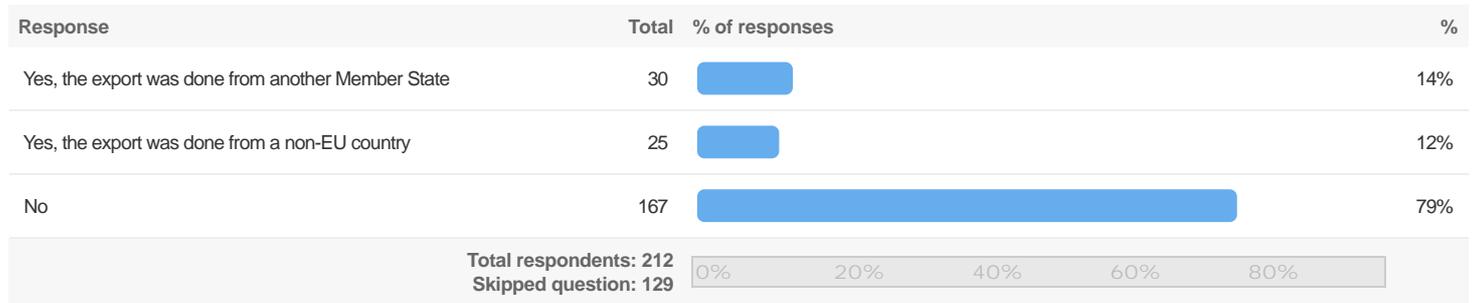
**22. Regarding the export of dual-use items, could you please indicate to what extent you agree with the following statements?**

Sub-questions	Resp.	% of responses	avg	med	SD
The administrative burden related to compliance with the dual-use export requirements is heavy and time-consuming	207		4.18	4	0.97
The procedures are complex	207		4.03	4	1.02
The licencing process is predictable	204		3.16	3	0.96
We experience delays at customs when seeking to export dual-use items	203		3.12	3	1.04

Average: 3,63 — Median: 4 — Standard Deviation: 1,11

- 1. Do not agree at all
- 2. Do not agree
- 3. Neither agree nor disagree
- 4. Agree
- 5. Fully agree

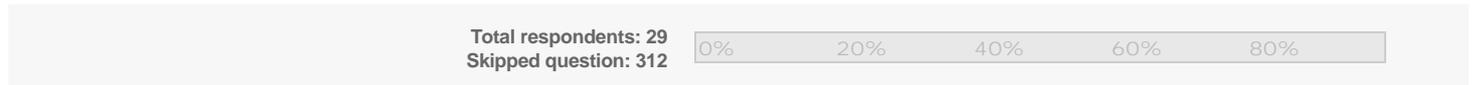
**23. Has your company experienced a case or cases where you received a denial for a licence application, when another EU or non-EU exporter fulfilled the deal through an identical export?**



**24. Additional information:**

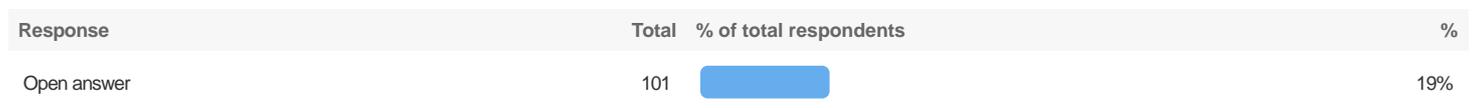


application authorities Company control DUAL **EU export** exporter goods know Licence  
licenses lost member non sanctions states



Compliance costs

**25. Could you estimate the average annual compliance costs for dual-use export controls incurred by your company in terms of number of staff (expressed in Full Time Equivalent FTE)?**



10 15

Average: 2 069,35 — Median: 0 — Standard Deviation: 11 396,14



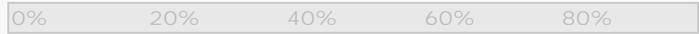
**26. If possible, would you be willing to share the annual average costs (in €) for this staff input?**

Response	Total	% of total respondents	%
Open answer	58		11%

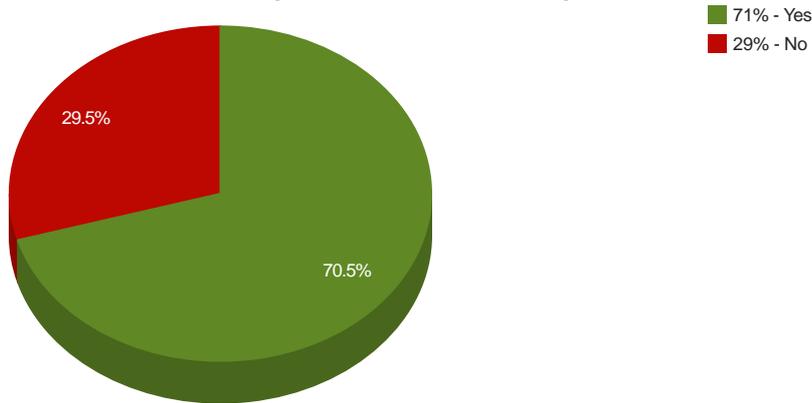
000 10000 100000 200000 500000

Average: 206 403,88 — Median: 0 — Standard Deviation: 551 241,06

Total respondents: 58  
Skipped question: 277



**27. Do you face other costs related to compliance with dual-use export controls?**

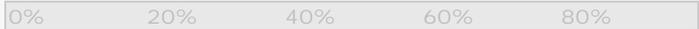


n=190

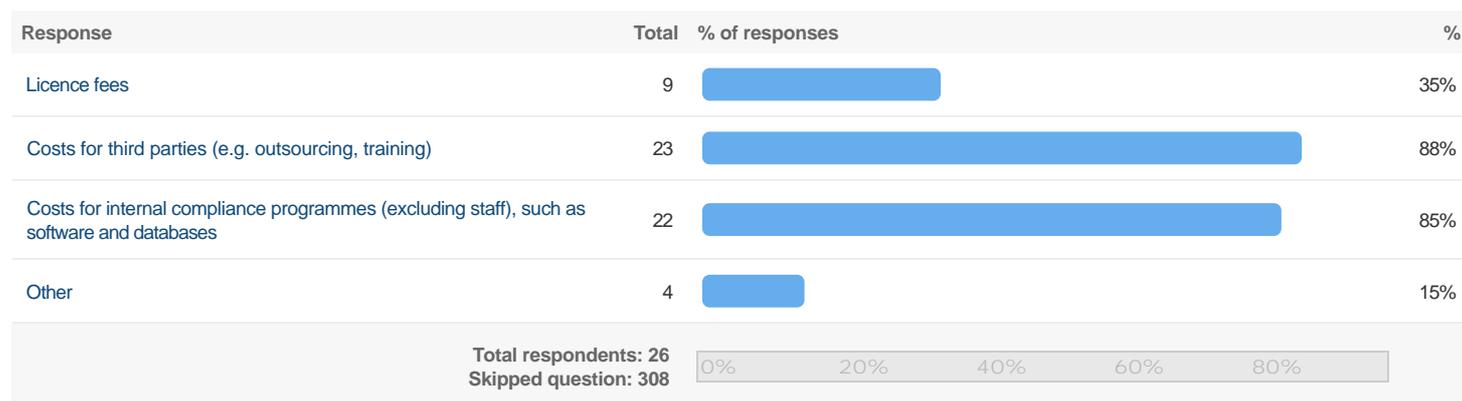
**28. Which of the following costs do you face related to compliance with dual-use export controls?**

Response	Total	% of responses	%
Licence fees	20		15%
Costs for third parties (e.g. outsourcing, training)	104		80%
Costs for internal compliance programmes (excluding staff), such as software and databases	110		85%
Other, please specify	29		22%

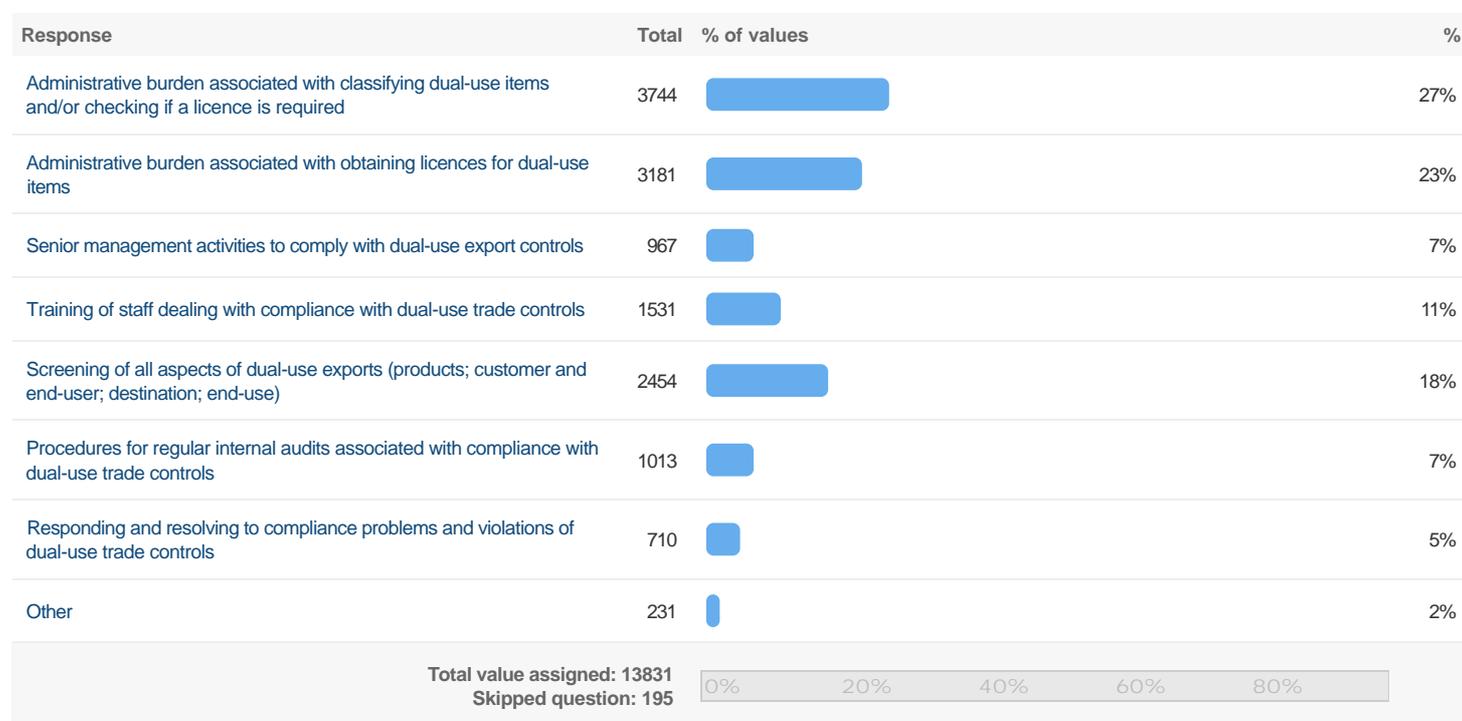
Total respondents: 130  
Skipped question: 204



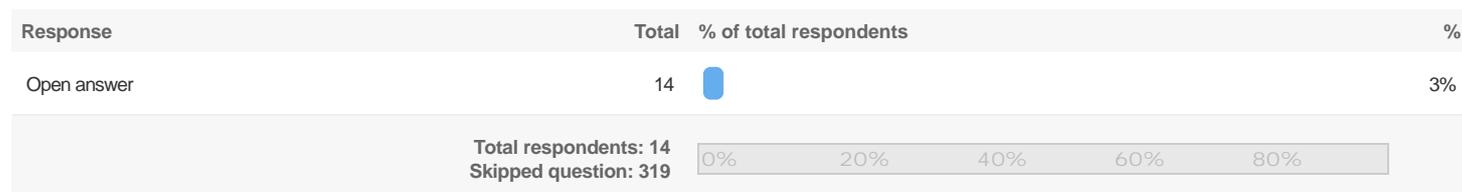
**29. If possible, would you be willing to share the annual average total costs (in €) in relation to the compliance with dual-use export controls?**



**30. Could you please indicate how the costs of complying with dual-use export controls are distributed among the following activities?**

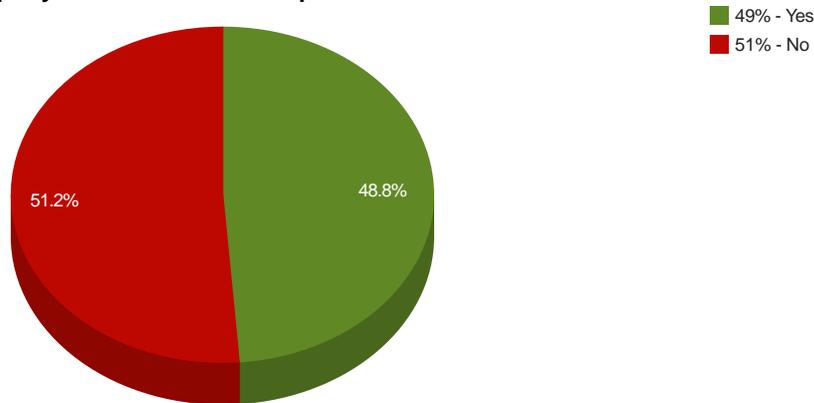


**31. You indicated that (some of) the costs of complying with dual-use export controls can be classified as other, please specify these costs below.**



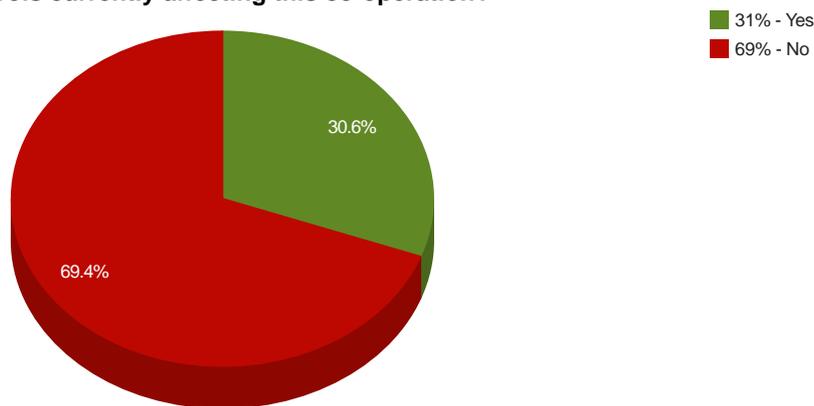
Other issues linked to dual-use export controls  
 The section aims at collecting information on the potential impacts of the export controls on the co-operation with the research partners and the brokers/freight forwarder/transporting companies.

**32. Does your company work with research partners such as academia and institutes?**



n=201

**33. Are export controls currently affecting this co-operation?**



n=98

**34. How are export controls currently affecting this co-operation?**

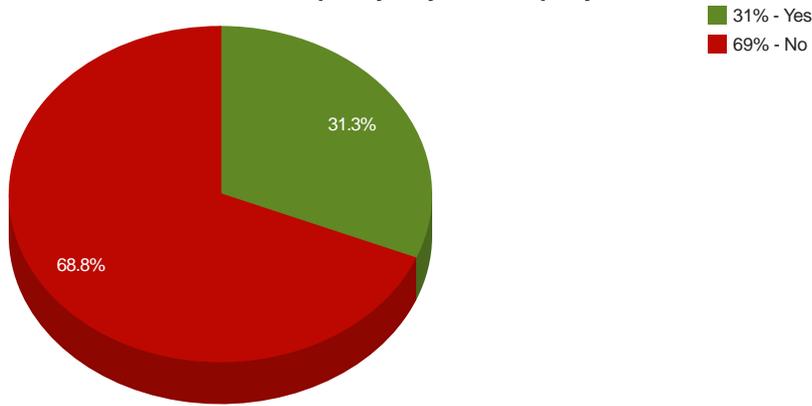
Response	Total	% of total respondents	%
Open answer	25		5%

control controls cooperation data **export** institutes partners requirements technical **technology**  
 transfers universities working

Total respondents: 25  
 Skipped question: 306



**35. Do export controls affect the innovative capacity of your company?**



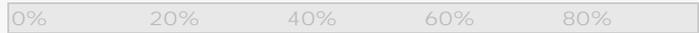
n=96

**36. How do export controls affect the innovative capacity of your company?**

Response	Total	% of total respondents	%
Open answer	26		5%

ability company control **controls** design development down Dual EU export innovative item  
need new outside Products research technology time

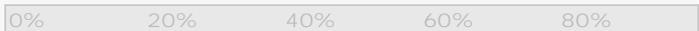
Total respondents: 26  
Skipped question: 303



**37. In 2009 brokers/freight forwarder/transporting companies also became subject to dual-use trade controls. Since then, please indicate if your company recognizes any of the following changes in the co-operation with these actors.**

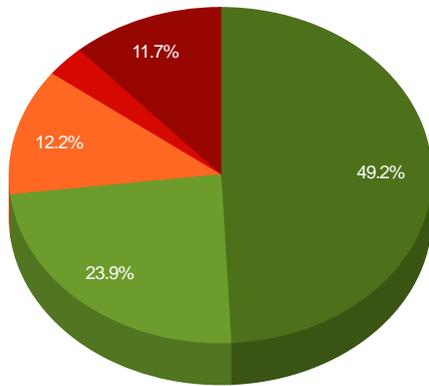
Response	Total	% of responses	%
Prices for the services of brokers/freight forwarders/transporting companies have increased	33		19%
Transactions have been delayed	35		20%
Administrative requirements have increased	68		39%
Number of companies willing to broker/transport/trade the products has decreased	20		11%
There are no changes in relation to these actors as a results of the regulation	93		53%
Other, please specify	11		6%

Total respondents: 175  
Skipped question: 154



Assessing the impact of review options This section aims at identifying the potential impacts of the following review issues on your company. Review issue 'Develop EU export control network' The Communication 'The Review of export control policy: ensuring security and competitiveness in a changing world' identifies options to enhance information exchange and develop IT infrastructure.

38. Please indicate which of the following statements most closely represents the situation of your company in relation to a standardised IT support tool and ele...

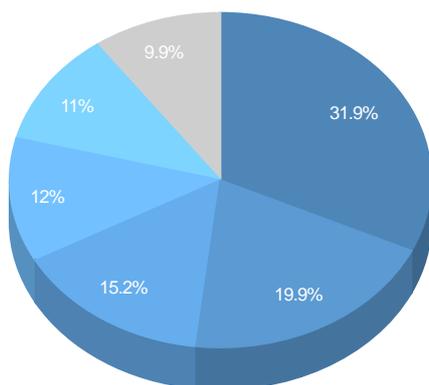


- 49% - We can already apply for licences electronically and we significantly benefit from it
- 24% - We can already apply for licences electronically but we do not significantly benefit from it
- 12% - We can't apply for licences electronically but we could significantly benefit from it
- 3% - We can't apply for licences electronically and we could not significantly benefit from it
- 12% - I don't know

n=197

Review issue 'Private Sector Partnership' The Communication 'The Review of export control policy: ensuring security and competitiveness in a changing world' identifies options to forge a partnership with the private sector, and suggests in particular facilitating controls by setting clear industry compliance standards and enhancing transparency and outreach to companies.

39. In view of supporting and facilitating the dual-use export procedures, your company would:



- 32% - Benefit the most from soft law measures such as guidelines including a list of compliance standards
- 20% - Be negatively affected by these measures
- 15% - Not benefit from either option
- 12% - No major difference between the two options above
- 11% - I don't know
- 10% - Benefit the most from legally binding requirements to set up and implement an internal compliance programme

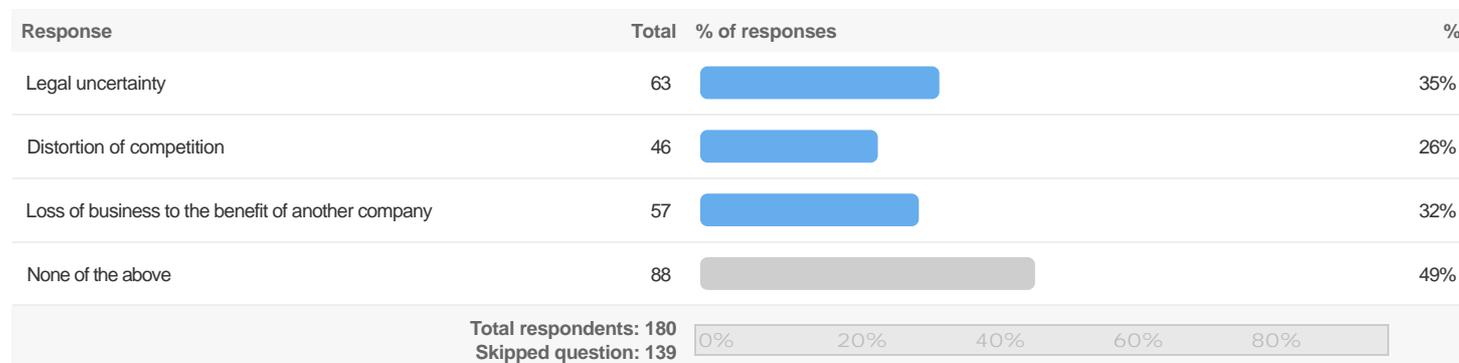
n=191

**40. Could you please rate the impact of consistent EU-wide legal requirements for industry compliance, combined with transparency and outreach, on the following aspects?**



Review issue 'Catch-all controls' Currently, there is some degree of divergence in the way EU Member States apply the catch-all clause in the EU dual-use Regulation (Art. 4), which makes dual-use items that are not included in the control list (Annex I) subject to control if they are or may be used in connection with a WMD (nuclear, biological, chemical weapon) end-use, a military end-use in an embargoed destination, or for use as parts or components of previous illegally exported military items.

**41. Could you please indicate whether, in your experience, the differences in application/interpretation of catch-all controls across the EU have any of the following effects?**



## 42. Additional comments:

Response	Total	% of total respondents	%
Open answer	17		3%

Total respondents: 17  
Skipped question: 302

## 43. Could you please rate the impact of the differences in the application/interpretation of catch-all controls in EU member states on the following aspects?

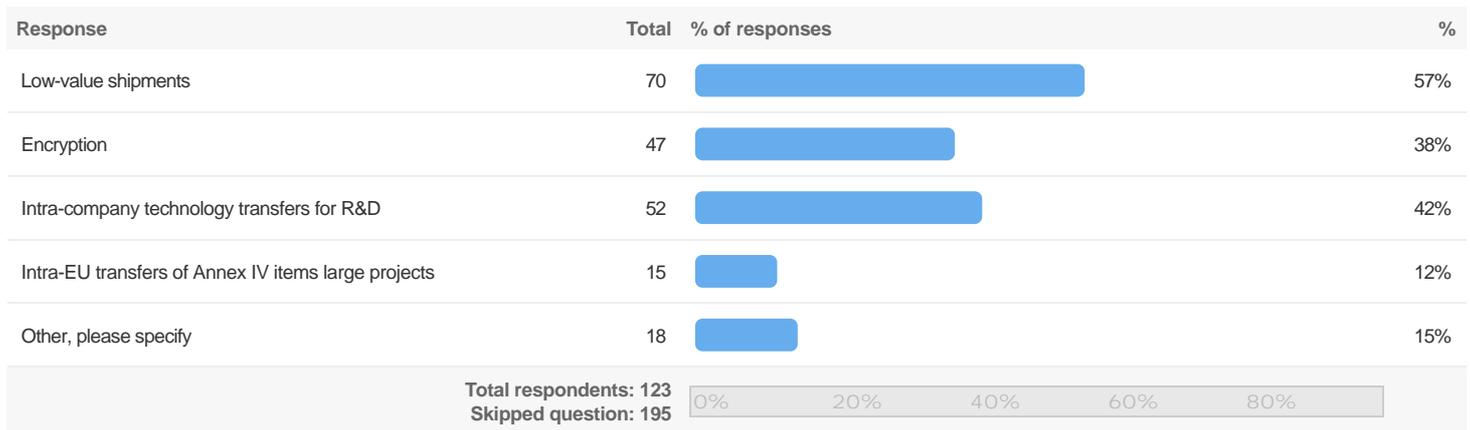
Sub-questions	Resp.	% of responses	avg	med	SD
Company's exports (trade effect)	171		2.32	2	0.72
Compliance costs	170		2.57	3	0.71
Investment and production	171		2.6	3	0.63
Level playing field	172		2.46	3	0.92
Other, please specify	56		2.8	3	0.6

Average: 2,49 — Median: 3 — Standard Deviation: 0,76

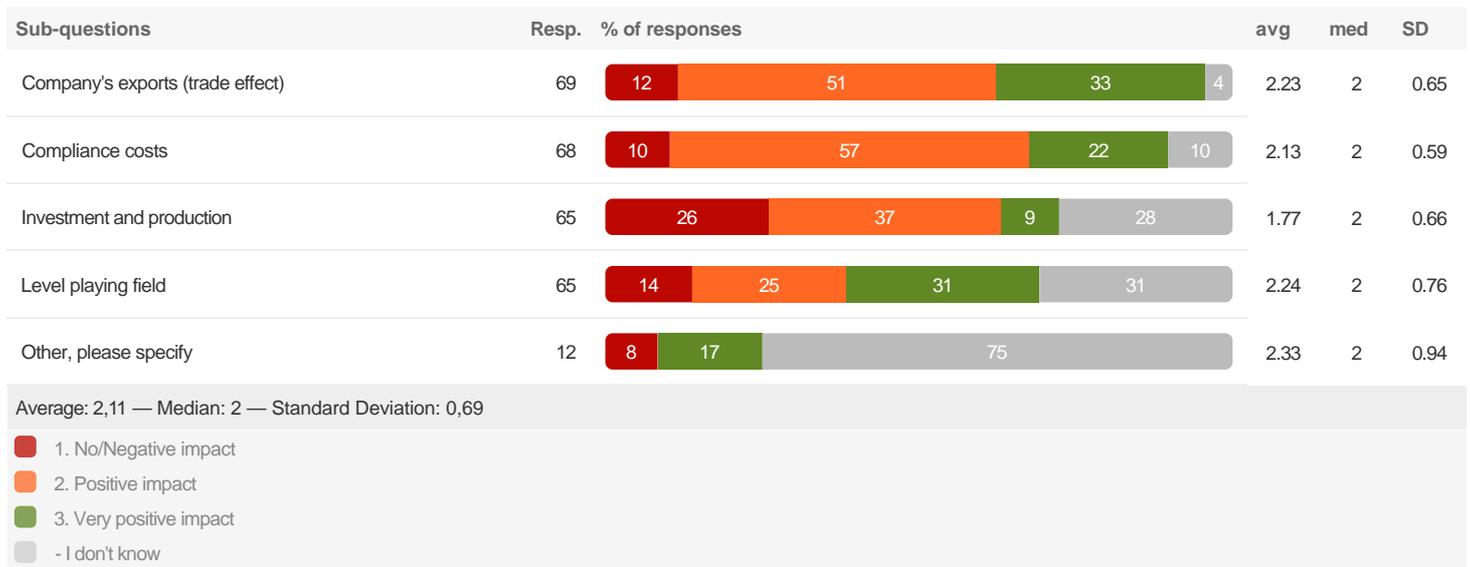
- 1. Very negative impact
- 2. Negative impact
- 3. Neutral
- 4. Positive impact
- 5. Very positive impact
- I don't know

Review issue 'Optimisation of licensing architecture' To optimise the licensing architecture in the EU, a number of review actions are under consideration, including the introduction of additional European Union General Export Authorisations (EUGEAs), which are trade facilitation measures that exempt certain exports to specified destinations from individual licensing requirements and only require reporting of these exports by the exporter.

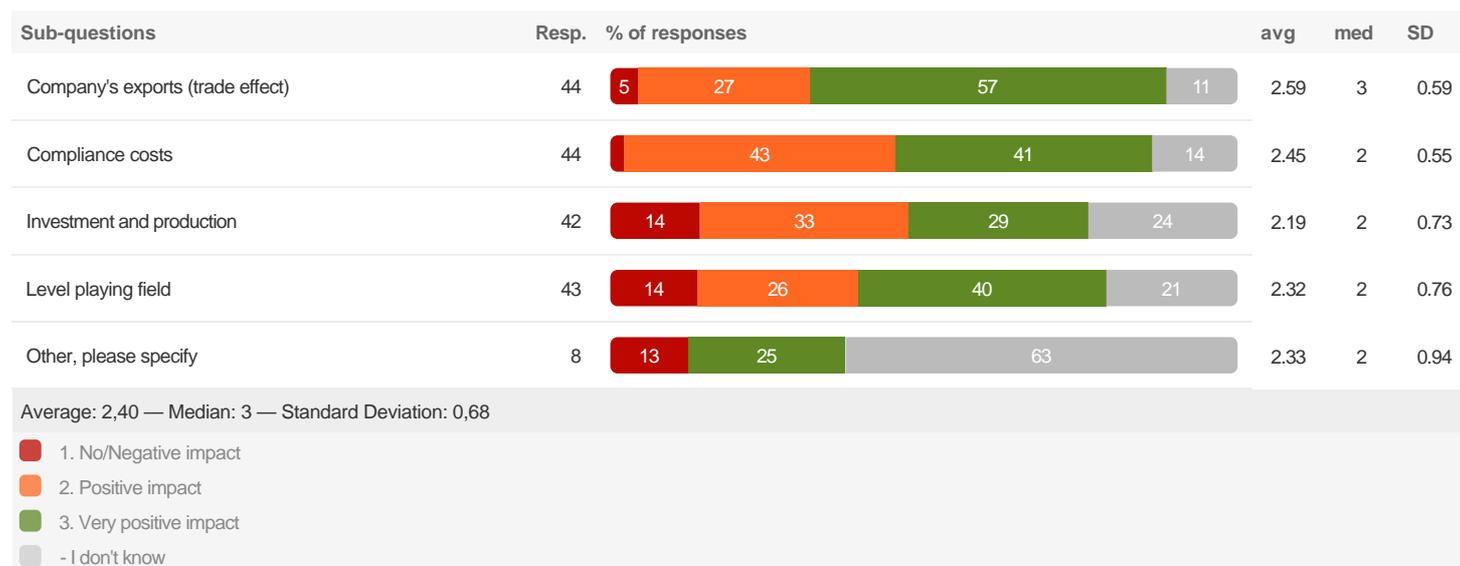
**44. Please select from which of the following EU General Export Authorisations your company would expect to highly benefit.**



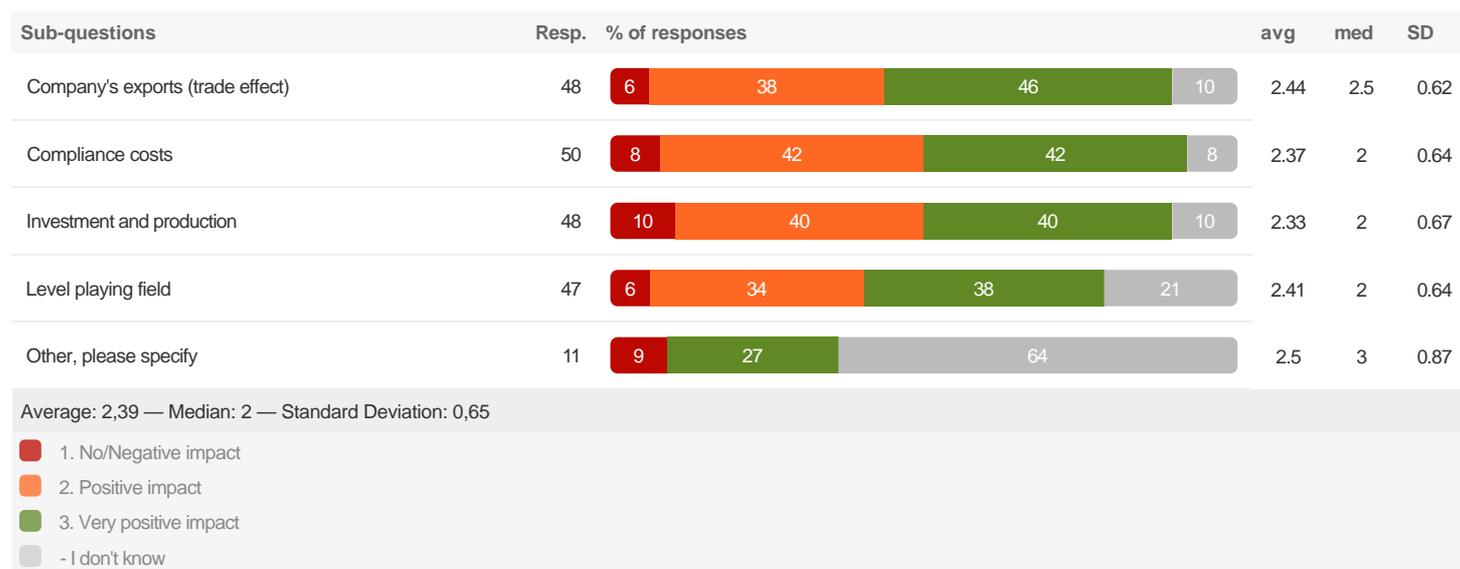
**45. Could you please rate the economic impact of the introduction of an EU General Export Authorisation for low-value shipments on the following aspects?**



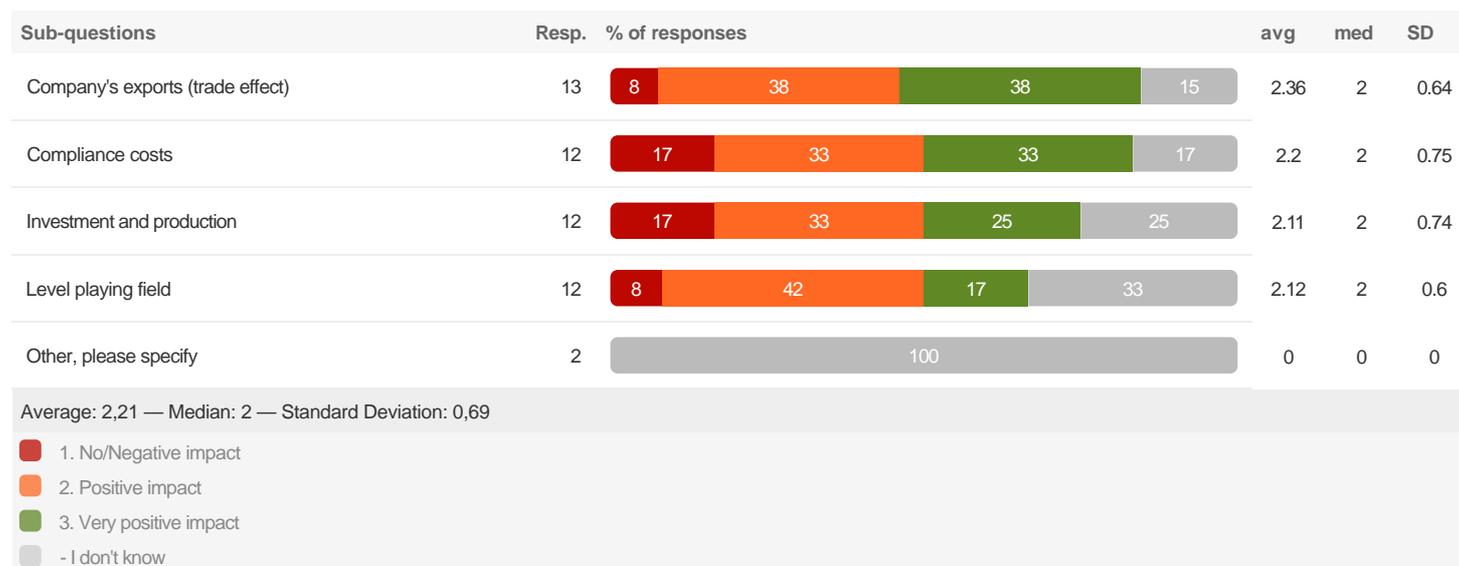
**46. Could you please rate the economic impact of the introduction of an EU General Export Authorisation for encryption on the following aspects?**



**47. Could you please rate the economic impact of the introduction of an EU General Export Authorisation for intra-company technology transfers for R&D on the following aspects?**

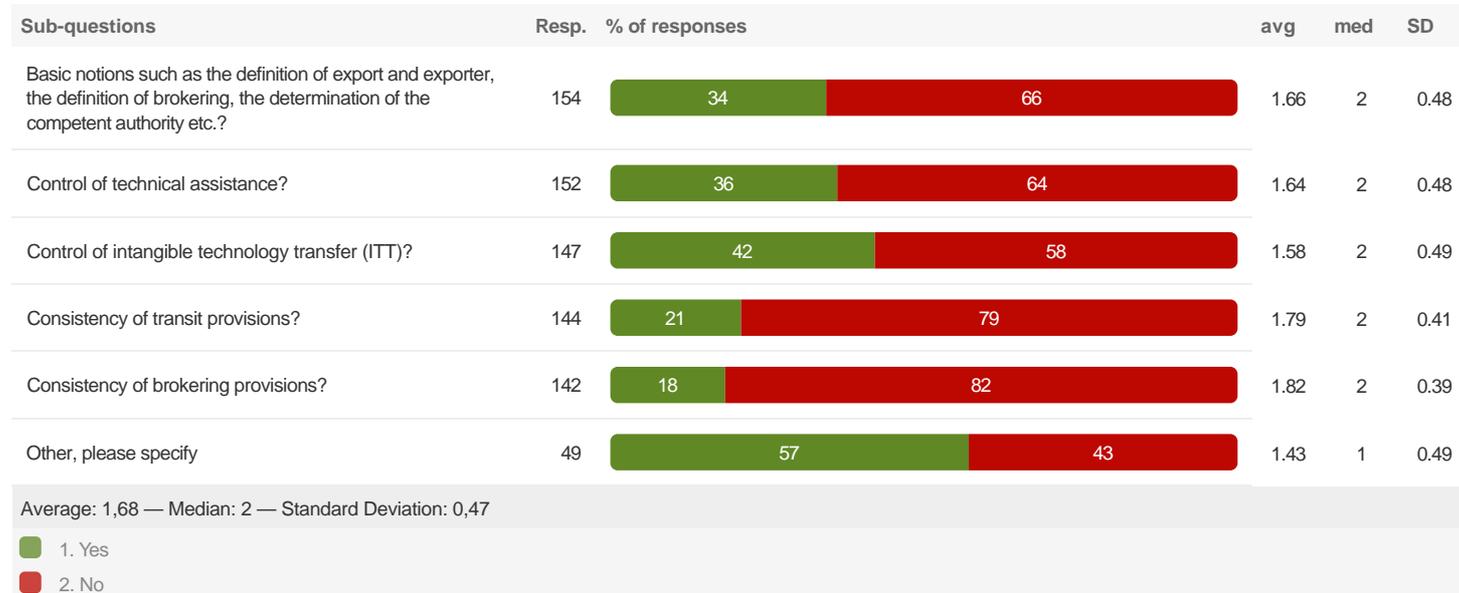


**48. Could you please rate the economic impact of the introduction of an EU General Export Authorisation for intra-EU transfers of Annex IV items large projects on the following aspects?**



Review issue 'Legal clarifications/amendments' Under the heading of an EU system update involving changes to existing regulations a number of legal clarifications and amendments are being considered.

**49. Do you see a need for legal clarification on:**



#### 49B. If yes, which changes would you propose and why?

If yes, which changes would you propose and why?	Total	% of total respondents	%
Basic notions such as the definition of export and exporter, the definition of brokering, the determination of the competent authority etc.?	15		3%
Control of technical assistance?	10		2%
Control of intangible technology transfer (ITT)?	13		2%
Consistency of transit provisions?	5		1%
Consistency of brokering provisions?	2		0%
Other, please specify	17		3%

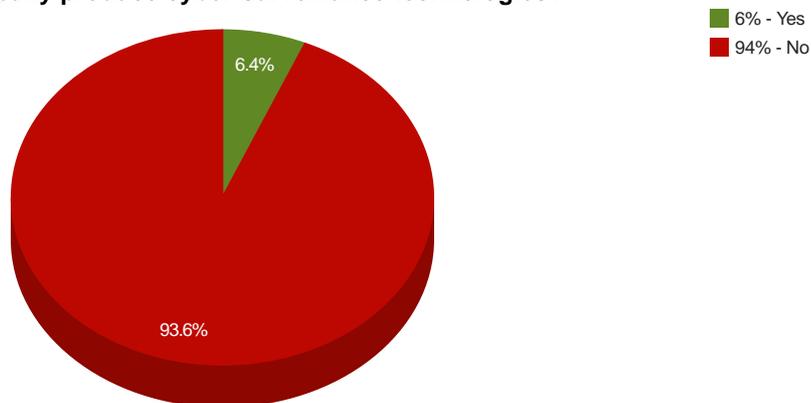
Total respondents: 49  
Skipped question: 269



Review option 'EU system modernisation' This review option covers the modernisation of existing controls, including adding a new dimension for controlling exports of cyber-surveillance technologies. This would potentially involve: Apply human security criteria to exports of cyber-surveillance technologies Obligatory self-regulation on the part of industry producing cyber-surveillance technologies Introduction of EU autonomous list for cyber-surveillance technologies Via technical or descriptive list Introduction of EU cyber-surveillance catch-all mechanism Dedicated catch-all for cyber-surveillance technologies or application of general catch-all

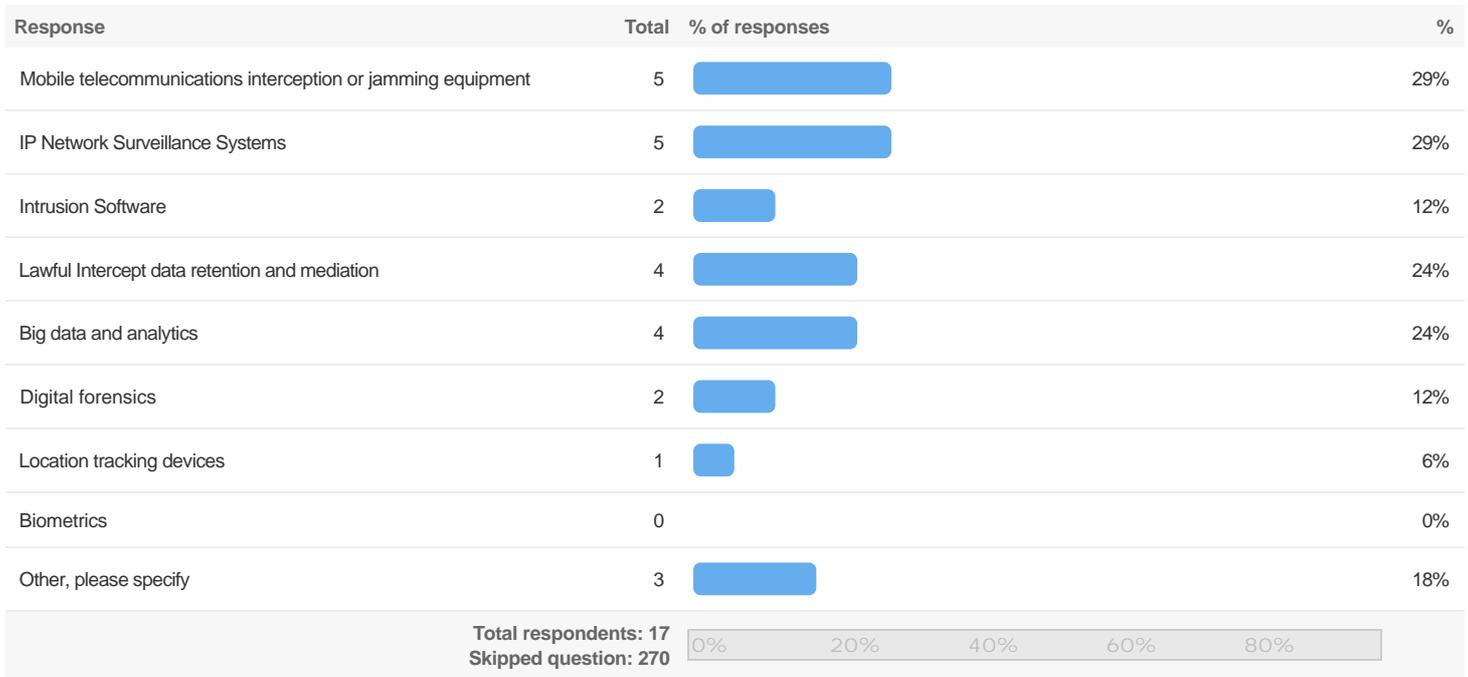
No agreed definition of 'cyber-surveillance technologies' has been created at the EU level thus far, but it could potentially include certain types of the following technologies: Mobile telecommunications interception or jamming equipment IP Network Surveillance Systems Intrusion Software Lawful Intercept data retention and mediation Big data and analytics Digital forensics Location tracking devices Biometrics

#### 50. Does your company produce cyber-surveillance technologies?

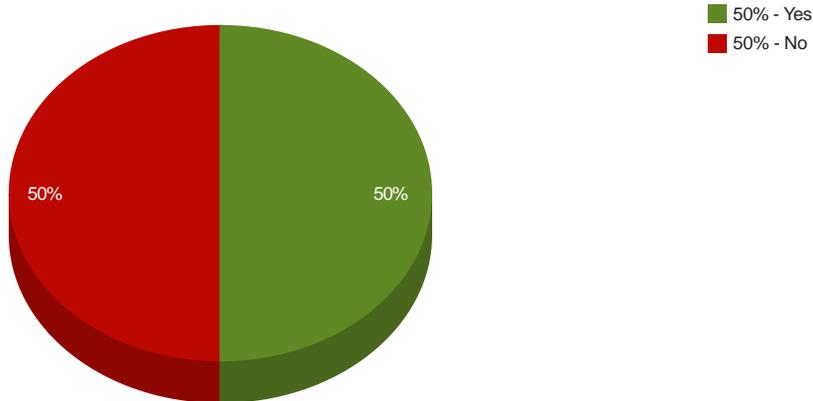


n=312

**51. Please indicate which types of cyber-surveillance technologies your company produces.**

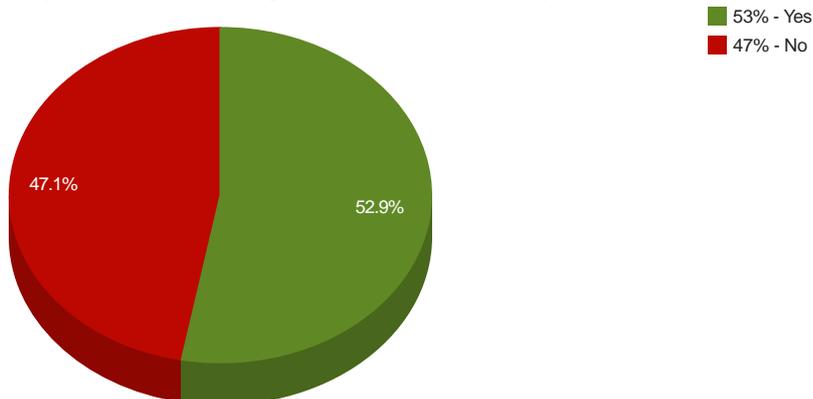


**52. Are you aware of exports of cyber-surveillance technologies from the EU that may pose a threat in terms of security or pose a risk of human rights violations?**



n=18

**53. Are you aware of exports of cyber-surveillance technologies from third countries that may pose a threat in terms of security or pose a risk of human rights vi...**



n=17

**54. Could you please rate the potential impact of licensing authorities applying human security criteria to exports of cyber-surveillance technologies for the following aspects?**

Sub-questions	Resp.	% of responses					avg	med	SD
Company's export (trade effect)	18	33	33	17	11	6	2.06	2	1
Compliance costs	18	33	50	6	6	6	1.82	2	0.78
Investment and production	18	28	28	22	11	11	2.19	2	1.01
Level playing field	18	28	33	22	6	11	2.06	2	0.9
Other, please specify	3	33	67				3	2	0

Average: 2,04 — Median: 2 — Standard Deviation: 0,94

- 1. Very negative impact
- 2. Negative impact
- 3. Neutral
- 4. Positive impact
- 5. Very positive impact
- I don't know

**55. Could you please rate the potential impact of obligatory self-regulation on the part of the industry producing cyber-surveillance technologies for the following aspects?**

Sub-questions	Resp.	% of responses					avg	med	SD	
Company's export (trade effect)	18	11	33	22	11	6	17	2.6	2	1.08
Compliance costs	18	11	33	22	11	6	17	2.6	2	1.08
Investment and production	18	11	17	39	6	6	22	2.71	3	1.03
Level playing field	18	17	17	33	6	6	22	2.57	3	1.12
Other, please specify	3	33	67				3	2	0	

Average: 2,63 — Median: 3 — Standard Deviation: 1,07

- 1. Very negative impact
- 2. Negative impact
- 3. Neutral
- 4. Positive impact
- 5. Very positive impact
- I don't know

**56. Could you please rate the potential impact of introducing an EU autonomous list for cyber-surveillance technologies for the following aspects?**

Sub-questions	Resp.	% of responses				avg	med	SD
Company's export (trade effect)	18	22	28	17	33	1.92	2	0.76
Compliance costs	18	17	39	11	33	1.92	2	0.64
Investment and production	18	17	22	22	39	2.09	2	0.79
Level playing field	18	22	17	22	39	2	2	0.85
Other, please specify	5	20	80			3	2	0

Average: 2 — Median: 2 — Standard Deviation: 0,77

- 1. Very negative impact
- 2. Negative impact
- 3. Neutral
- 4. Positive impact
- 5. Very positive impact
- - I don't know

**57. Could you please rate the potential impact of introducing an EU cyber-surveillance catch-all mechanism for the following aspects?**

Sub-questions	Resp.	% of responses					avg	med	SD
Company's export (trade effect)	18	33	28	17	11	11	2.06	2	1.03
Compliance costs	18	39	28	11	11	11	1.94	2	1.03
Investment and production	18	28	33	22	6	11	2.06	2	0.9
Level playing field	18	28	28	22	6	17	2.07	2	0.93
Other, please specify	4	50			50		3	3	0

Average: 2,06 — Median: 2 — Standard Deviation: 0,97

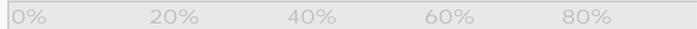
- 1. Very negative impact
- 2. Negative impact
- 3. Neutral
- 4. Positive impact
- 5. Very positive impact
- - I don't know

58. Please list the review actions which are perceived to have a strong positive economic impact on your company.

Response	Total	% of total respondents	%
Open answer	70		13%

application available benefit catch code companies **Company** Consistent control **controls**  
 countries Customs definition Dual electronic Encryption End **EU export** exporter field  
**General** goods guidance impact intra Introduction items law level licence Licences license  
 Licenses licensing low National New non playing **products** regulation requirements sanctions  
 shipments soft technology transfers value within

Total respondents: 70  
 Skipped question: 217

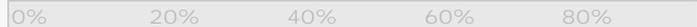


59. Please list the review actions which are perceived to have a strong negative economic impact on your company.

Response	Total	% of total respondents	%
Open answer	60		11%

additional again business **Catch** companies company compared compliance Control **controls**  
 countries customers Dual Embargo **EU export** field general impact IRAN ITEMS know level Licence  
 licences LICENSES list Long member note open outside playing procedure **regulations** requirements  
 Review Russia sanctions screening set **States time** within

Total respondents: 60  
 Skipped question: 227

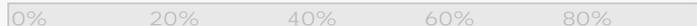


60. Please list the review actions which are perceived to have a strong positive security impact on your company.

Response	Total	% of total respondents	%
Open answer	37		7%

know None review **security**

Total respondents: 37  
 Skipped question: 250



61. Please list the review actions which are perceived to have a strong negative security impact on your company.

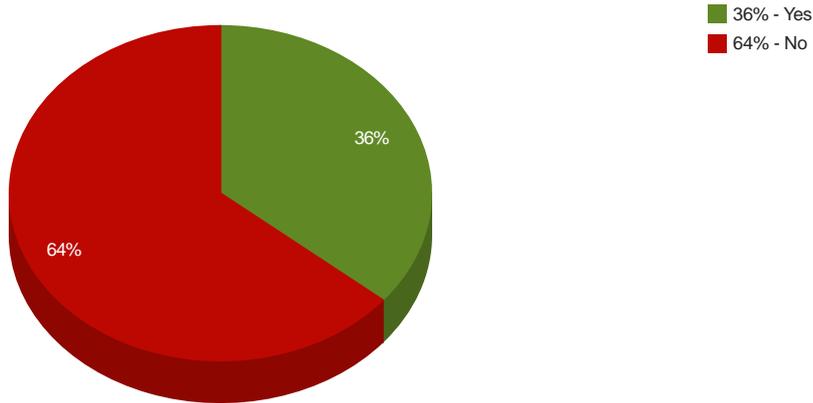
Response	Total	% of total respondents	%
Open answer	33		6%

know **None** security

Total respondents: 33  
Skipped question: 254

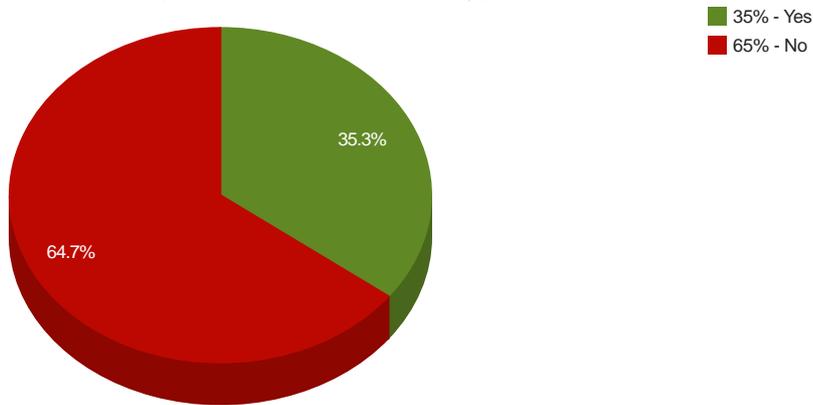


62. Could you please indicate if we can use the name of your company for: Providing a list of respondents (without the answers) to the EC?



n=286

63. Could you please indicate if we can use your contact details for: Contacting you for further contribution to the study?



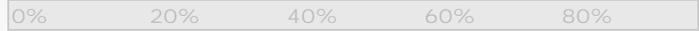
n=286

64. Please enter the name of your company:

Response	Total	% of total respondents	%
Open answer	102		19%

BVBA Co EUROPE GmbH INTERNATIONAL KG Ltd NV Technologies

Total respondents: 102  
Skipped question: 22

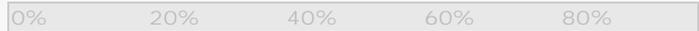


65. Please enter the email address on which we may contact you for further contribution to the study:

Response	Total	% of total respondents	%
Open answer	99		18%

com de dk

Total respondents: 99  
Skipped question: 0



# Export controls - Business Associations

Status:	<b>Closed</b>	Partial completes:	<b>45 (64,3%)</b>
Start date:	<b>29-05-2015</b>	Screened out:	<b>0 (0%)</b>
End date:	<b>19-07-2015</b>	Reached end:	<b>25 (35,7%)</b>
Live:	<b>52 days</b>	Total responded:	<b>70</b>
Questions:	<b>59</b>		

## Panel

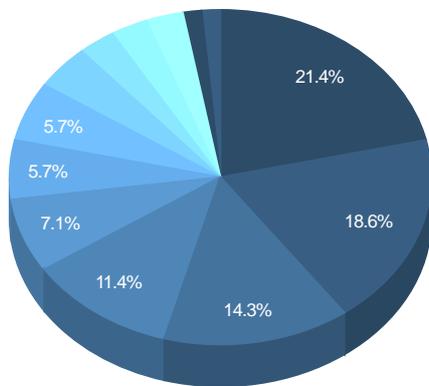
Panelist count:	<b>45</b>	Partial completes:	<b>4 (50%)</b>
Bounced:	<b>0 (0%)</b>	Reached end:	<b>4 (50%)</b>
Declined:	<b>1 (2,2%)</b>	Responses:	<b>8 (17,8%)</b>

## Non-panel

Responses:	<b>62</b>	Partial completes:	<b>41 (66,1%)</b>
Start page views:	<b>335</b>	Screened out:	<b>0 (0%)</b>
		Reached end:	<b>21 (33,9%)</b>

Overview of sector and association This first set of questions aims at getting an overview of your industry and association collecting general information on your sector and members.

### 1. Which industry does your association represent?



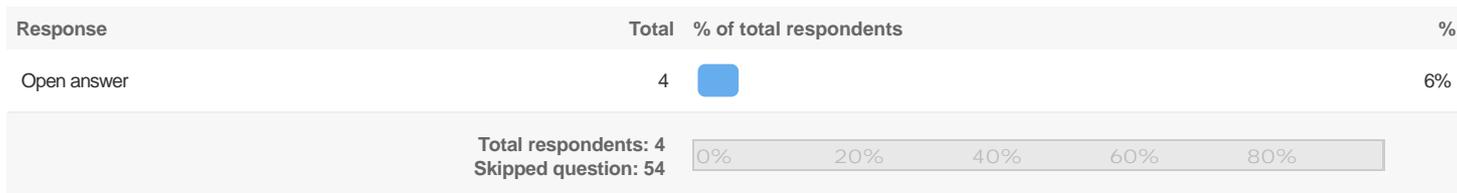
- 21% - Manufacture of machinery and equipment n.e.c.
- 19% - Other manufacturing
- 14% - Manufacture of computer, electronic and optical products
- 11% - Manufacture of chemicals and chemical products
- 7% - Other non-manufacturing
- 6% - Manufacture of fabricated metal products, except machinery and equipment
- 6% - Manufacture of electrical equipment
- 4% - Manufacture of basic pharmaceutical products an...
- 3% - Manufacturing of food, beverages and tobacco
- 3% - Manufacture of other non-metallic mineral products
- 3% - Manufacture of transport equipment
- 1% - Manufacturing of wood, paper and products thereof
- 1% - Manufacture of basic metals

### 2. You indicated that the industry your association represents can be classified as 'Other manufacturing', please specify which industry your association represents.

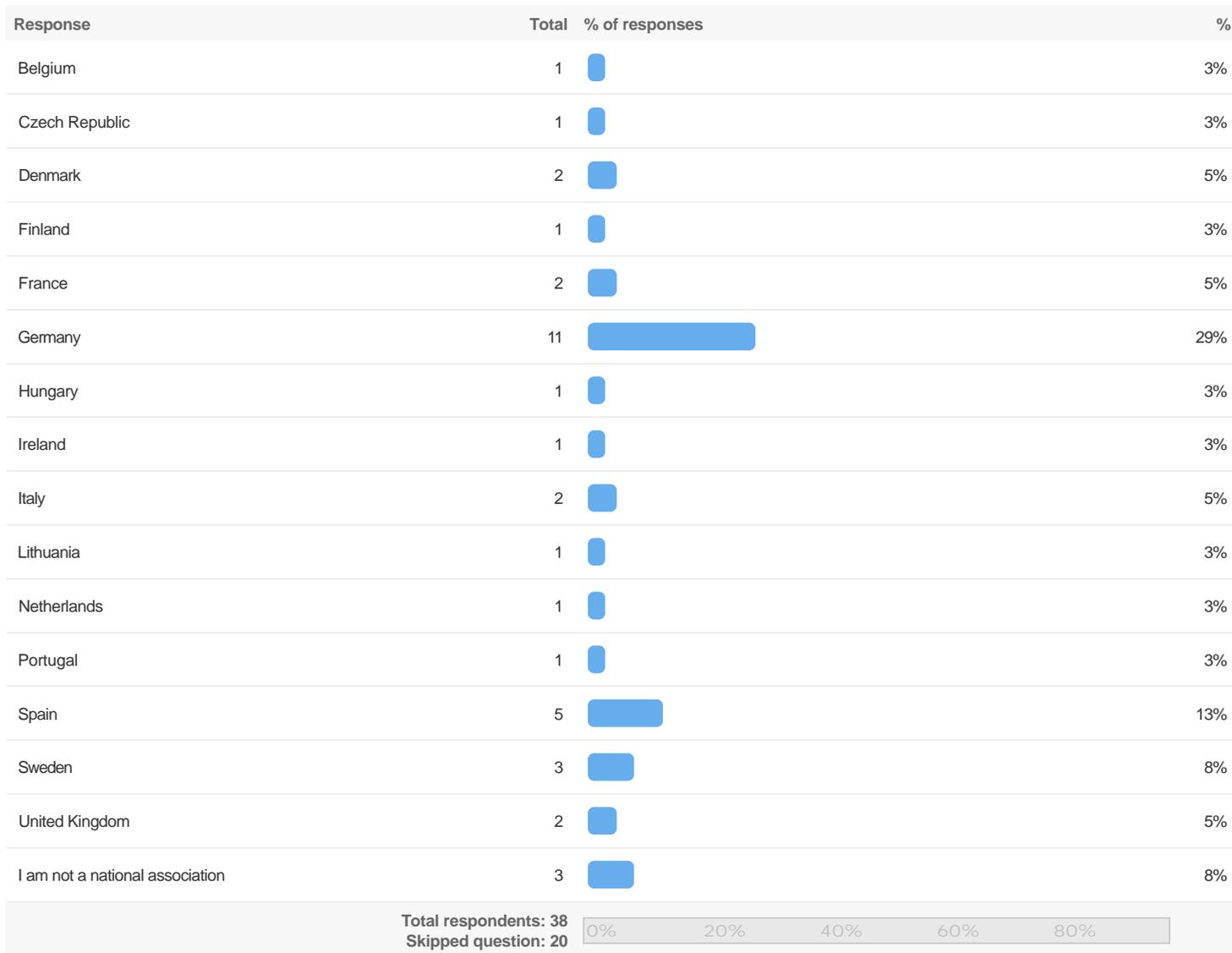
Response	Total	% of total respondents	%
Open answer	10	<div style="width: 14%;"></div>	14%

Total respondents: 10  
Skipped question: 48

**3. You indicated that the industry your association represents can be classified as 'Other non-manufacturing', please specify which industry your association represents.**



**4. If you are a national (industry) association, in which Member State are you based?**



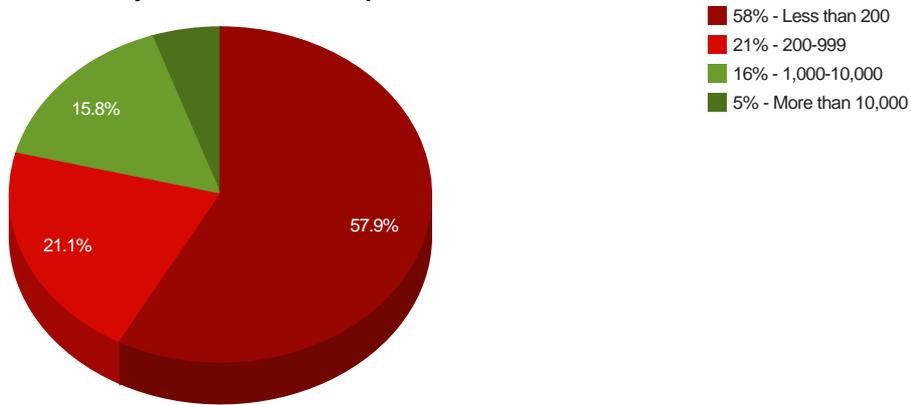
### 5. Could you please select the types of members of your association?

Response	Total	% of responses	%
Individuals	9		16%
Companies	48		83%
Associations/Federations	11		19%
Others	3		5%

Total respondents: 58  
Skipped question: 0



### 6. How many companies does your association represent?

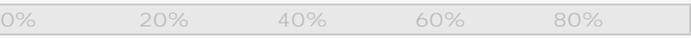


n=38

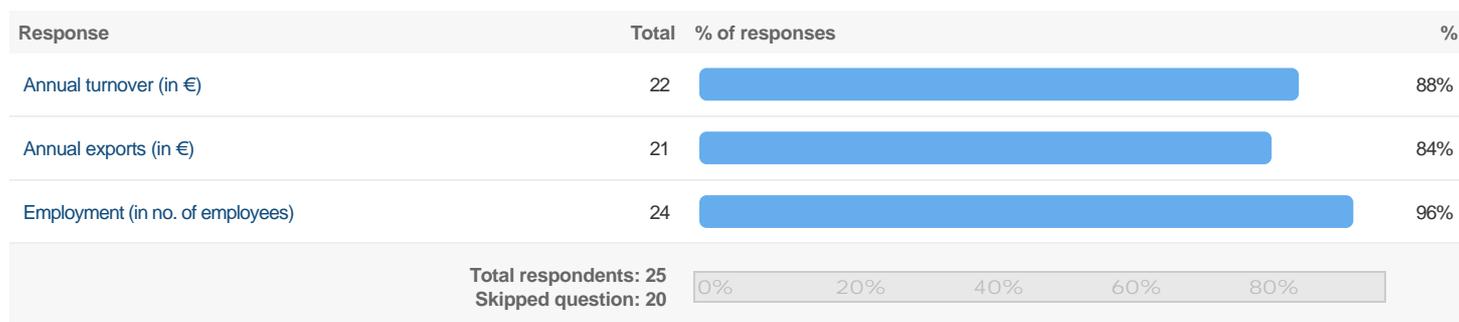
### 7. What is the share of SMEs?

Response	Total	% of responses	%
0-25%	4		11%
26-50%	5		14%
51-75%	9		25%
76-100%	18		50%

Total respondents: 36  
Skipped question: 9

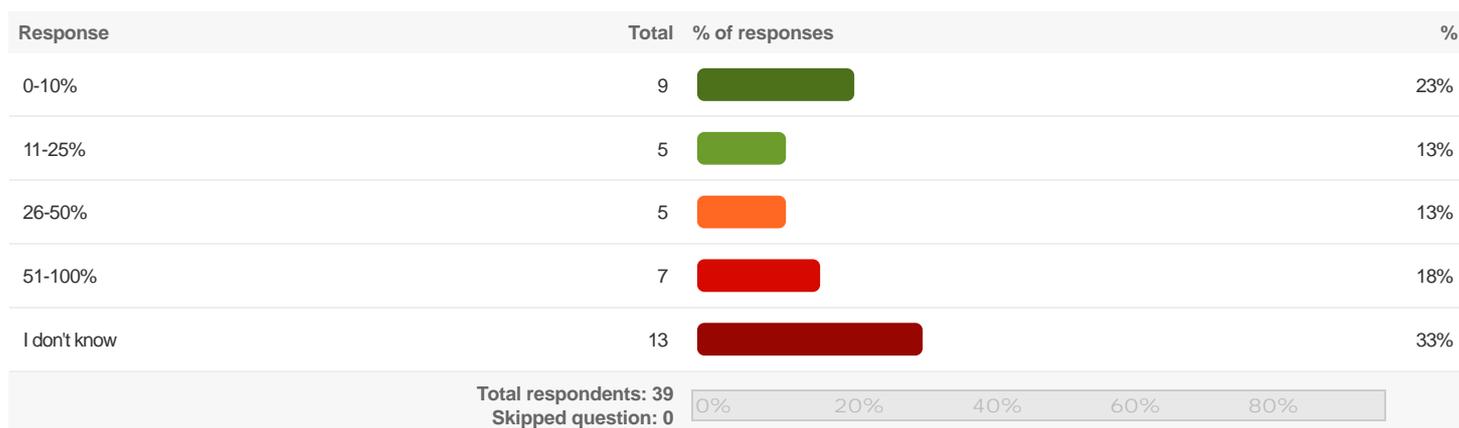


**8. Please provide the following information on your members (i.e. totals of all members) in terms of:**

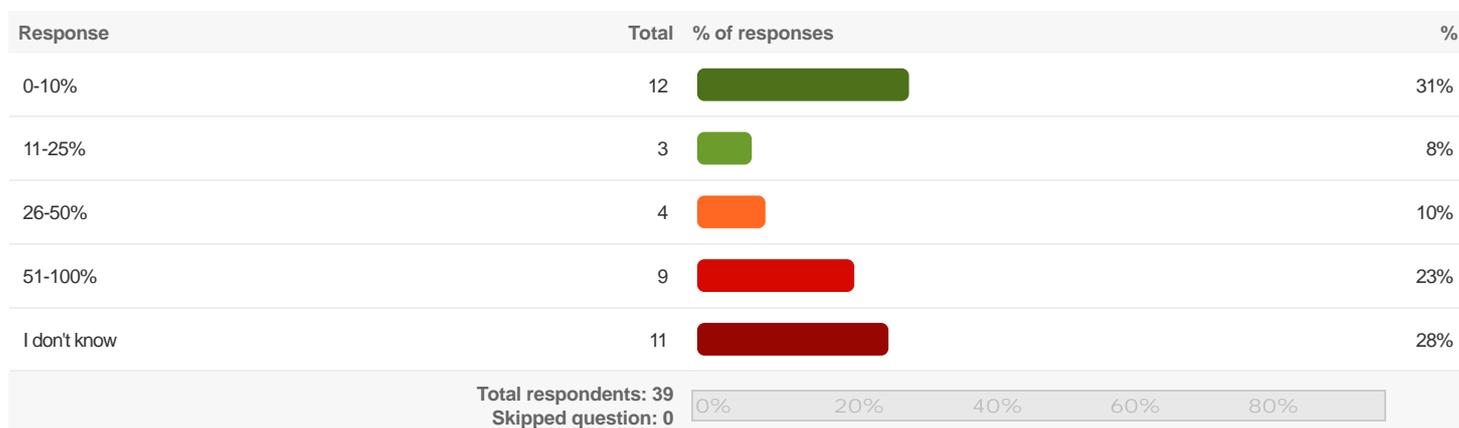


Importance of dual-use items in turnover, trade and competition This section aims at collecting data on the importance of dual-use products for your industry and gathering information on competition issues in your sector.

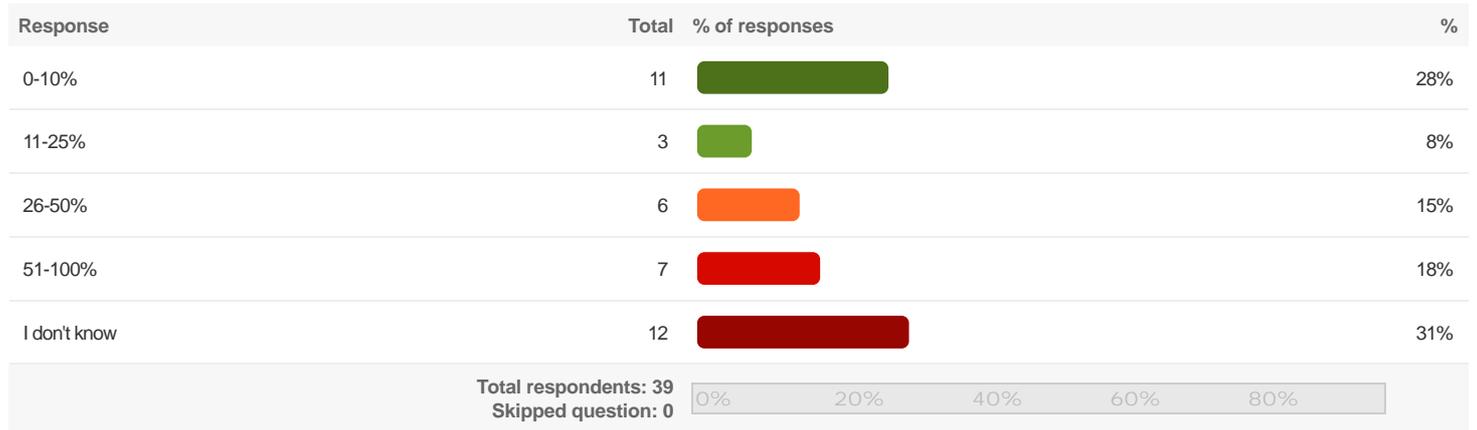
**9. Could you please estimate the share of turnover corresponding to the production of dual-use items?**



**10. Could you please estimate the share of exports corresponding to the production of dual-use items?**



11. Could you please estimate the share of employment corresponding to the production of dual-use items?



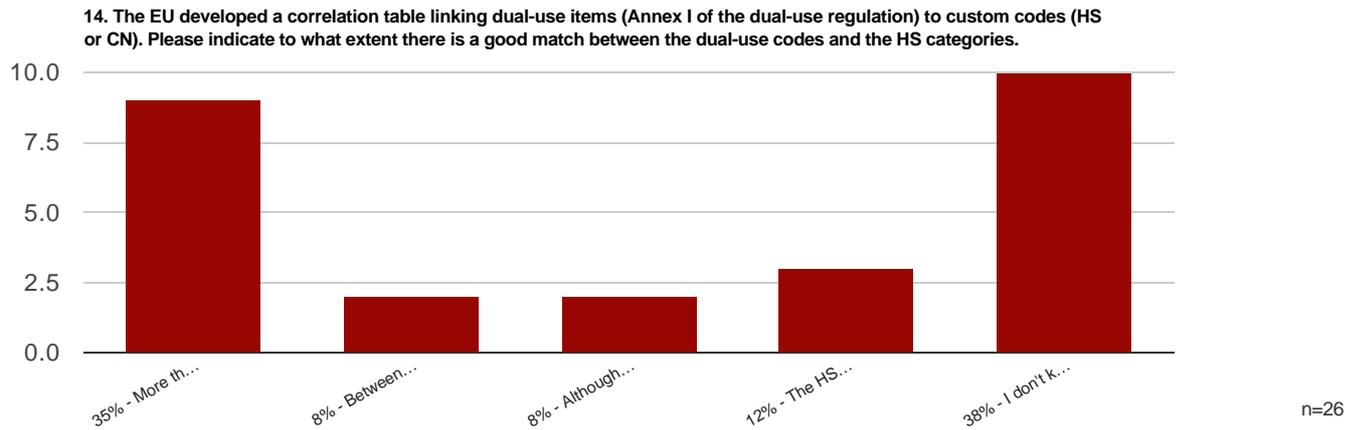
## 12. Please select the HS codes of dual-use products typically exported by your members.



13. If possible, please provide the specific HS(4 or 6-digit)/CN (8 digit) or Dual-Use Classification Number (as per Annex I to Regulation 428/2009) of the 10 dual-use products most commonly exported by your members.

Response	Total	% of total respondents	%
Open answer	12	<div style="width: 17%;"></div>	17%

Total respondents: 12  
Skipped question: 17



15. If you can provide more information on which specific HS codes are particularly strong or weak in representing dual-use products, please provide this information in the box below.

Response	Total	% of total respondents	%
Open answer	7	<div style="width: 10%;"></div>	10%

Total respondents: 7  
Skipped question: 22

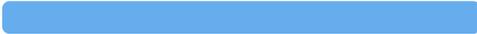
**16. With respect to competition from third countries, do you experience that the industries in these countries:**

Sub-questions	Resp.	% of responses	avg	med	SD
Produce similar items in countries where export controls apply?	27		1.22	1	0.41
Produce similar items but only for low and/or medium technologies in countries where export controls apply?	27		1.38	1	0.49
Produce similar items in countries where export controls do not apply?	27		1.23	1	0.42
Produce similar items but only for low and/or medium technologies in countries where export controls do not apply?	27		1.45	1	0.5
Other, please specify	8		1.25	1	0.43

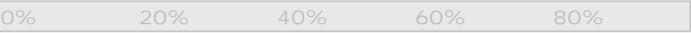
Average: 1,31 — Median: 1 — Standard Deviation: 0,46

- 1. Yes
- 2. No
- - I don't know

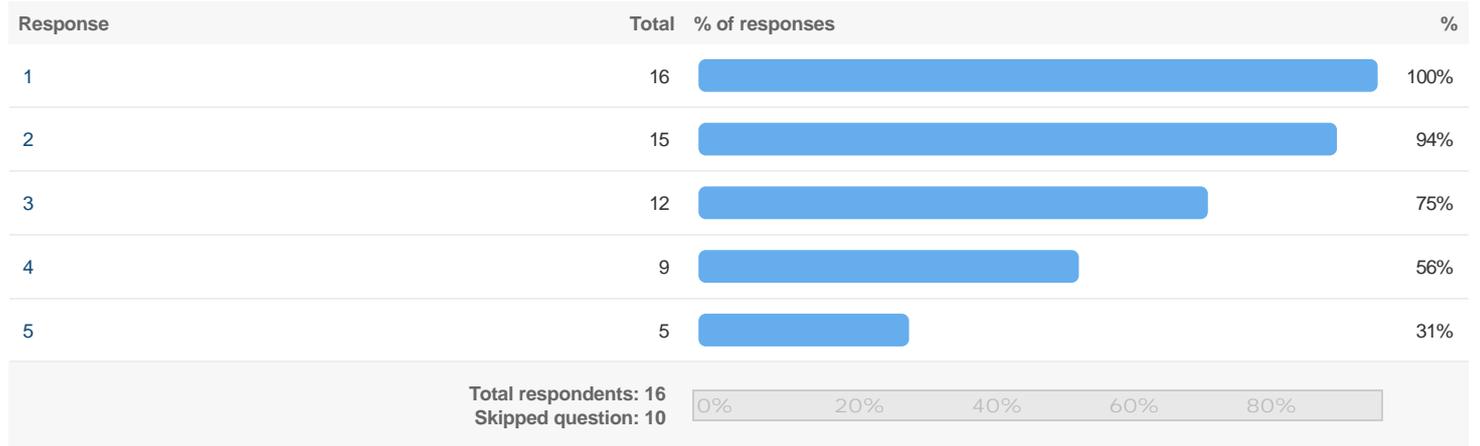
**17. Do the current dual-use export controls affect competition or the level-playing field in your sector?**

Response	Total	% of responses	%
Yes, they give rise to significant distortions between big and small companies	8		30%
Yes, they give rise to significant distortions between companies located in different EU Member States	15		56%
Yes, they give rise to significant distortions between EU companies and third country competitors	19		70%
No	3		11%
I don't know	3		11%

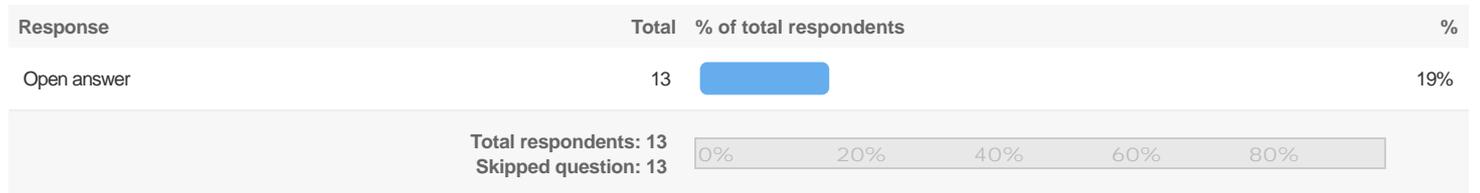
Total respondents: 27  
Skipped question: 0



18. You indicated that the current dual-use export controls give rise to significant distortions between EU companies and third country competitors. Please specify the top 5 third country destinations of concern, 1 being the most important and 5 being the least important.

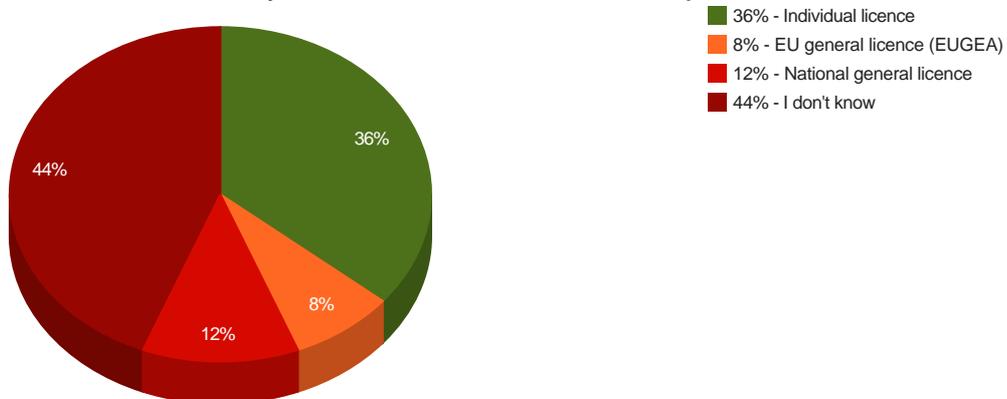


19. Please enter below any additional comments on the distortions of competition and destinations of concern.



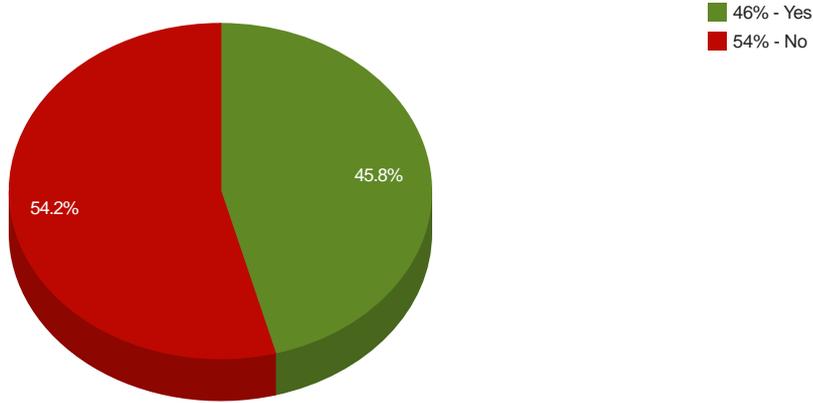
The licensing of dual-use items and export control management This section aims at clarifying the types of licences used for dual-use products in your industry, the obtaining and managing of licences for dual-use items and the related compliance costs.

20. What types of licence do the members of your association use most often to export dual-use items?



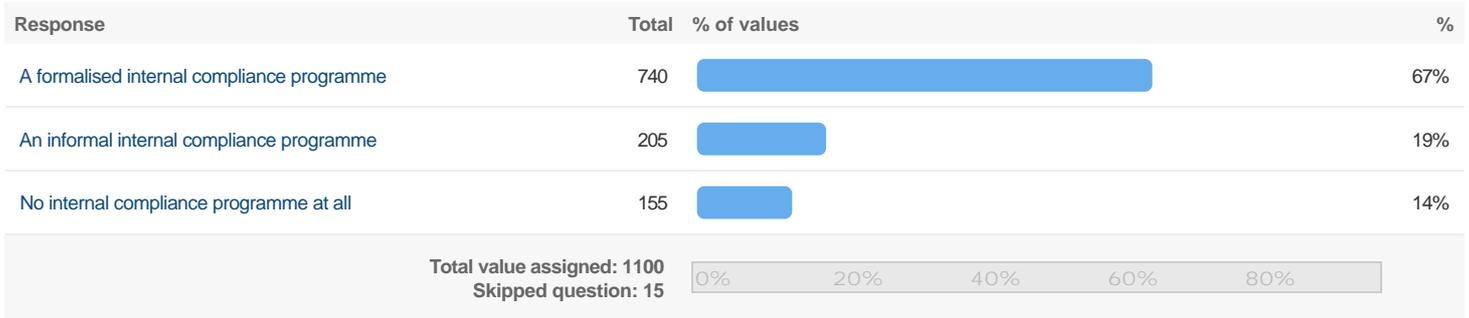
n=25

21. Do you have information or insights into the compliance programmes of companies in your association?

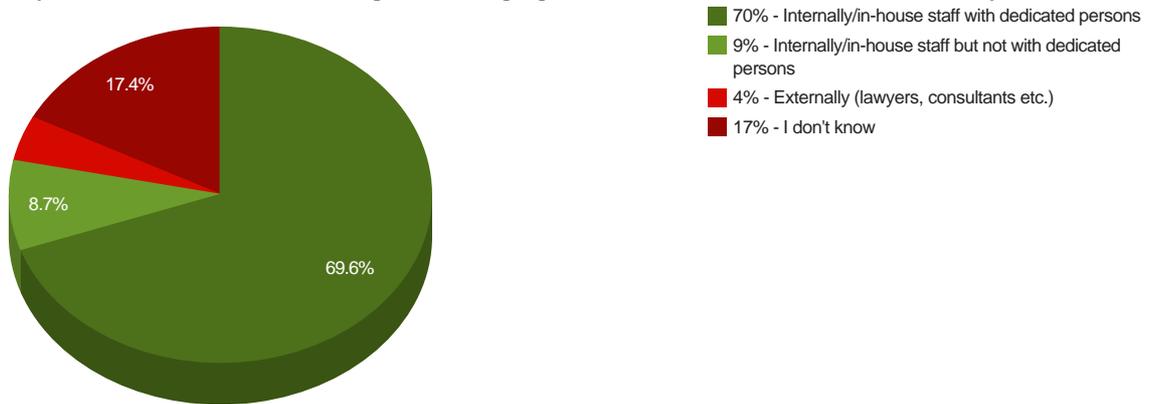


n=24

22. Please estimate the share of the companies in your association that have:



23. In the companies of your association, the obtaining and managing of licences for dual-use items is usually done:

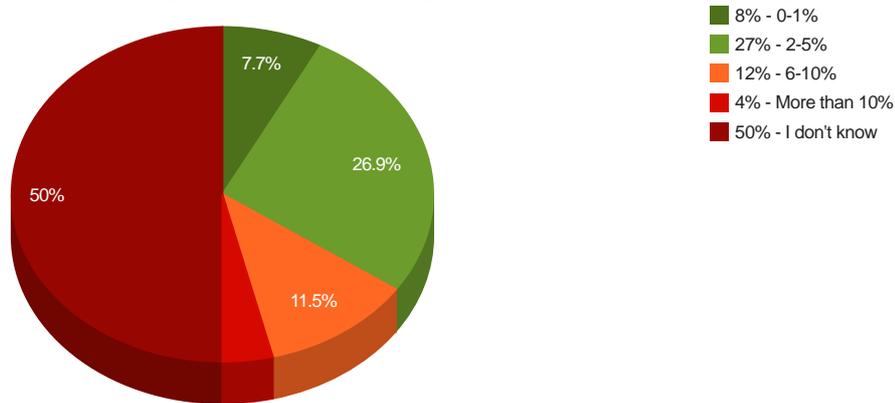


n=23

**24. To what extent have members of your association informed you about the following difficulties in dual-use exports?**

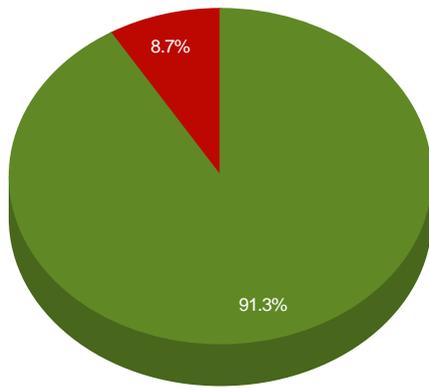


**25. Could you estimate the share of the compliance costs for dual-use export controls in total turnover at industry level?**



Technology transfers, brokering and transit controls This section aims at collecting information on the potential impacts of the export controls on the co-operation between your members with research partners and brokers/freight forwarder/transporting companies.

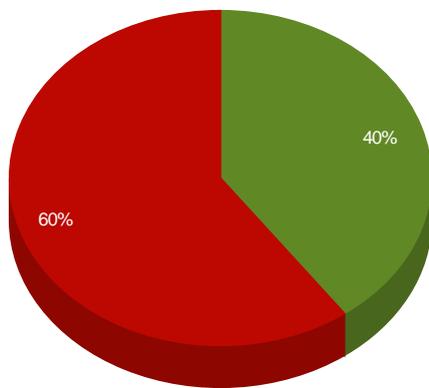
26. Do the companies members of your association work with research partners such as academia and institutes?



91% - Yes  
9% - No

n=23

27. Are export controls currently affecting this co-operation?



40% - Yes  
60% - No

n=20

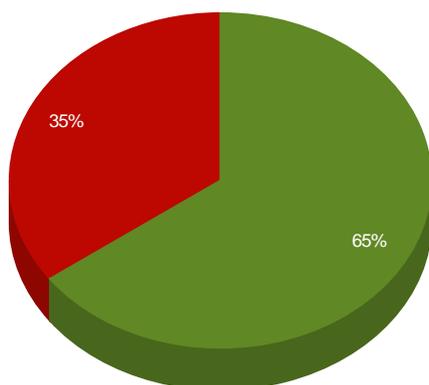
28. How are export controls currently affecting this co-operation?

Response	Total	% of total respondents	%
Open answer	7		10%

Total respondents: 7  
Skipped question: 18

0% 20% 40% 60% 80%

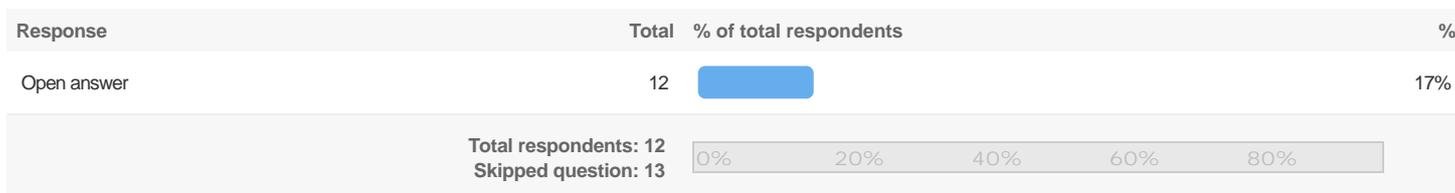
29. Do export controls affect the innovative capacity of the sector?



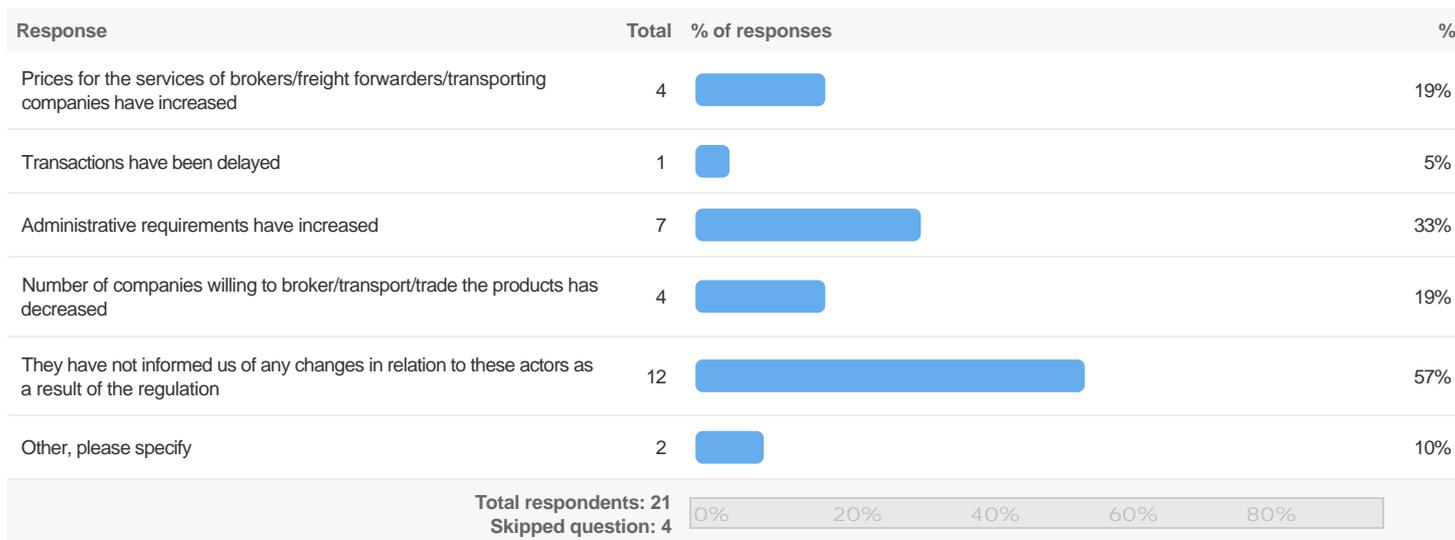
65% - Yes  
35% - No

n=20

### 30. How do export controls affect the innovative capacity of the sector?

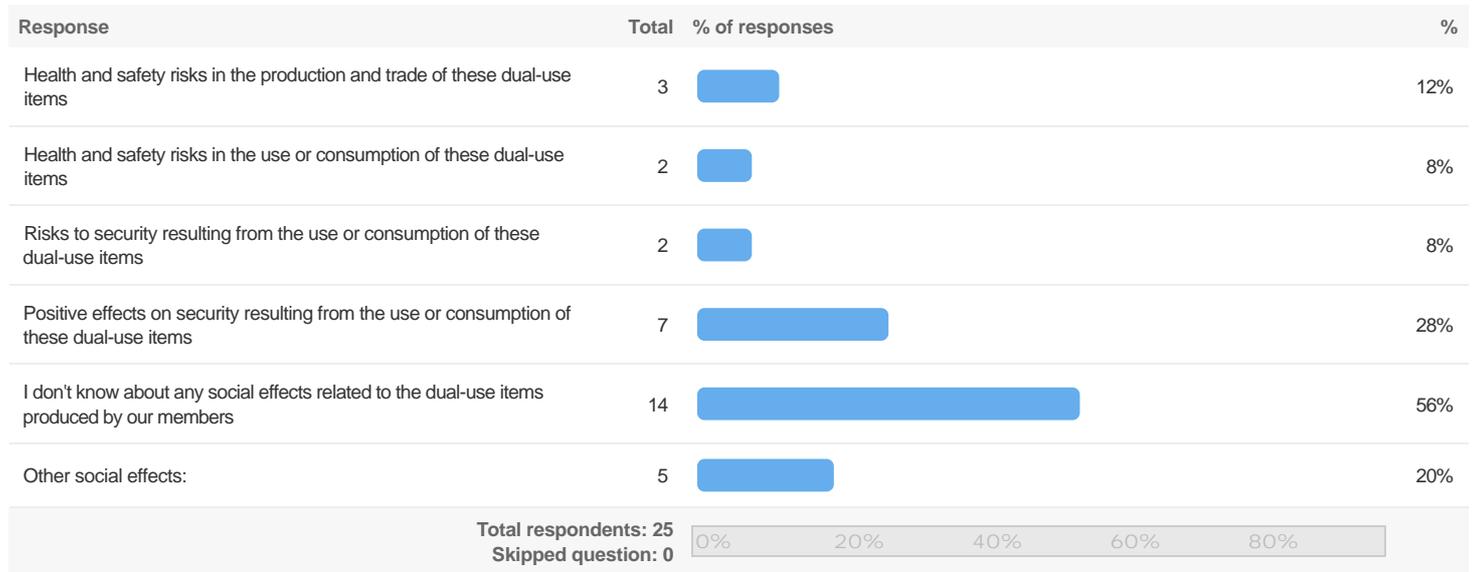


### 31. In 2009 brokers/freight forwarder/transporting companies also became subject to dual-use trade controls. Since then, please indicate if members in your association have reported any of the following changes in the co-operation with these actors.

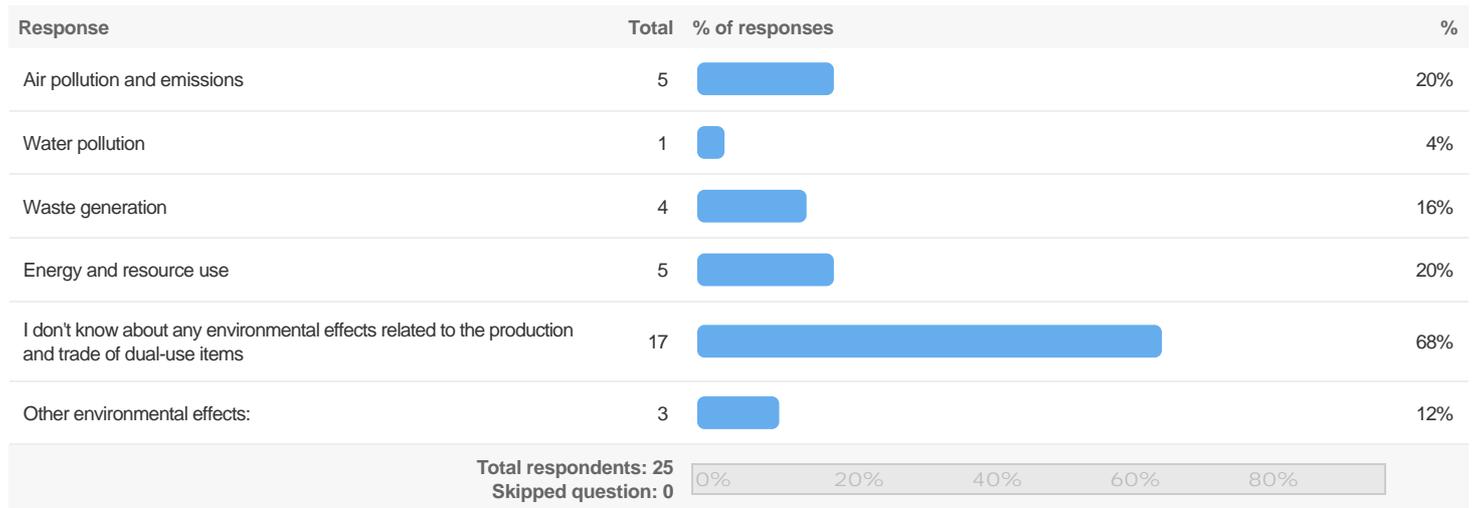


Social and environmental impacts This section aims at identifying the potential impacts and effects of the dual-use items produced by your sector on the society and the environment.

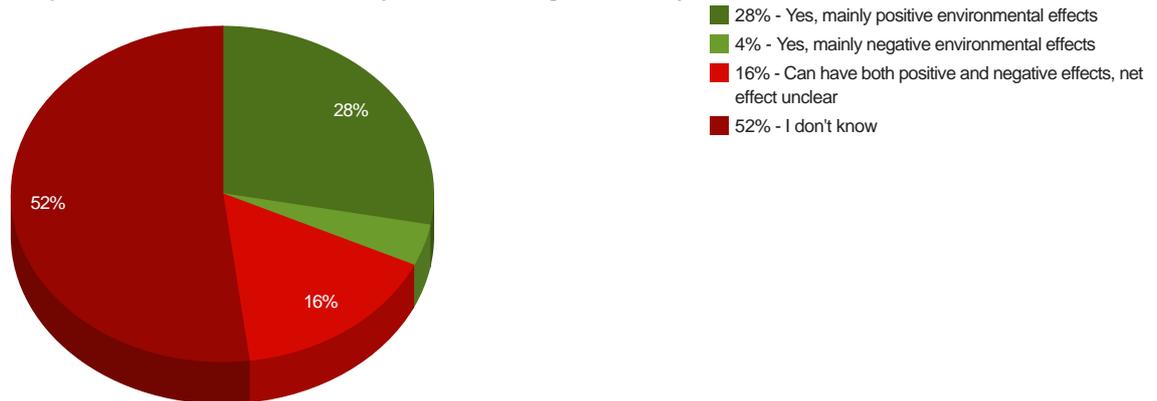
### 32. Do the dual-use items produced by your members generate any of the following social impacts?



### 33. In the production and trade of dual-use items in your sector, which of the following environmental effects are most relevant to your members?

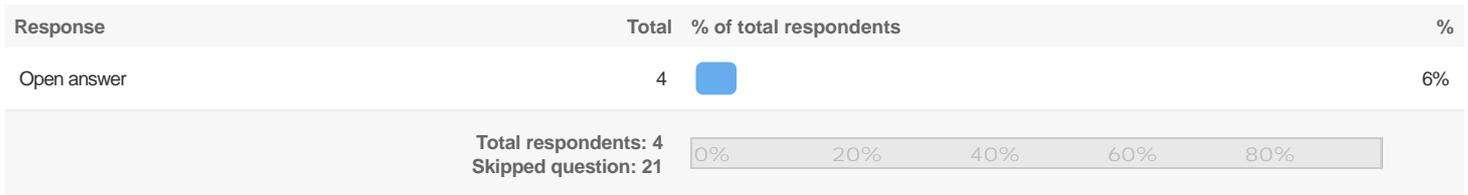


### 34. Does the use/consumption of the dual-use items of your members generate any environmental effects?

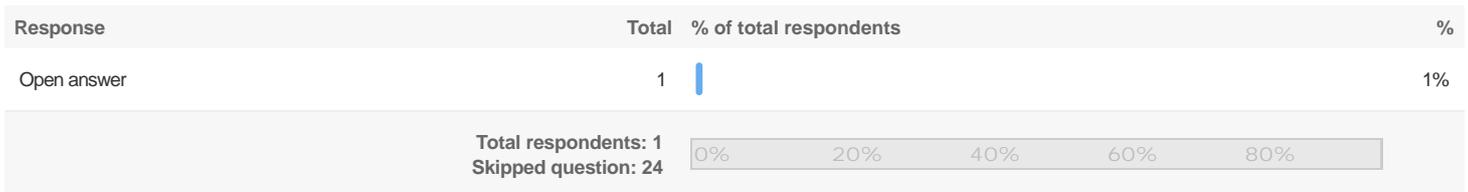


n=25

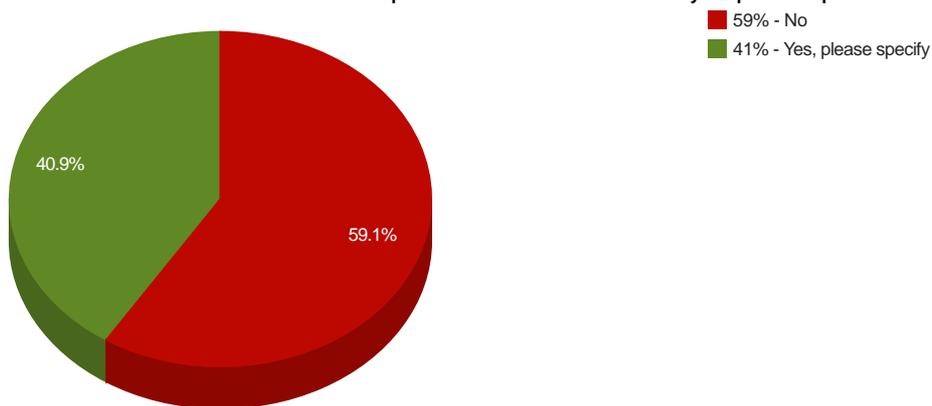
35. You indicated that the use/consumption of the dual-use items of your members generate mainly positive environmental effects. Please specify which effects.



36. You indicated that the use/consumption of the dual-use items of your members generate mainly negative environmental effects. Please specify which effects.



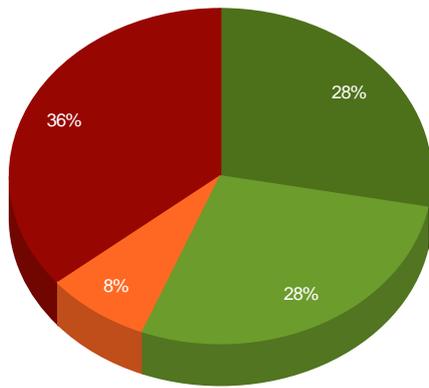
37. Are there any other important issues related to the current dual-use export controls that are not covered by the previous questions?



n=22

Assessing the impact of review options This section aims at identifying the potential impacts of the following review issues on the members of your association. Review issue 'Develop EU export control network' The Communication 'The Review of export control policy: ensuring security and competitiveness in a changing world' identifies options to enhance information exchange and develop IT infrastructure.

38. Please indicate which of the following statements most closely represents the situation of the members of your association in relation to a standardised IT s...

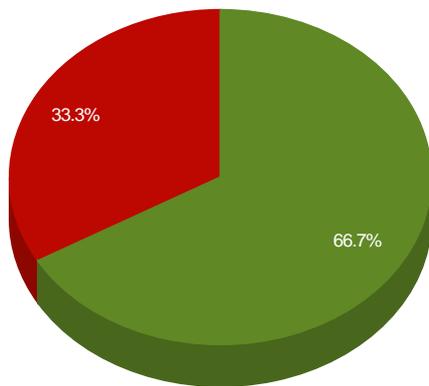


- 28% - They can already apply for licences electronically and they significantly benefit from it
- 28% - They can already apply for licences electronically but they do not significantly benefit from it
- 8% - They can't apply for licences electronically but they could significantly benefit from it
- 36% - I don't know

n=25

Review issue 'Private Sector Partnership' The Communication 'The Review of export control policy: ensuring security and competitiveness in a changing world' identifies options to forge a partnership with the private sector, and suggests in particular to facilitate controls by setting clear industry compliance standards and enhancing transparency and outreach to companies.

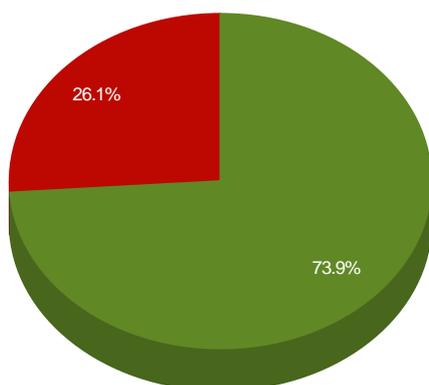
39. Have the members of your association reported distortions of competition associated with varying levels of industry compliance within the EU?



- 67% - Yes
- 33% - No

n=24

40. Have the members of your association reported distortions of competition associated with varying levels of industry compliance in third countries?



- 74% - Yes
- 26% - No

n=23

**41. In view of supporting and facilitating the dual-use export procedures and ensuring a level-playing field, how would you assess the impact of the following measures on the members of your association?**

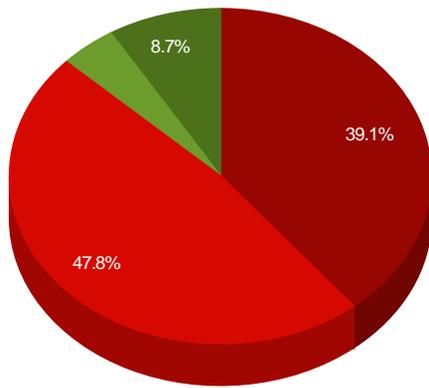


**42. Could you please rate the impact of consistent EU-wide legal requirements for industry compliance, combined with transparency and outreach, on the following aspects?**



Review issue 'Catch-all controls' Currently, there is some degree of divergence in the way EU Member States apply the catch-all clause in the EU dual-use Regulation (Art. 4), which makes dual-use items that are not included in the control list (Annex I) subject to control if they are or may be used in connection with a WMD (nuclear, biological, chemical weapon) end-use, a military end-use in an embargoed destination, or for use as parts or components of previously illegally exported military items.

**43. Could you indicate whether your members have reported divergent applications of catch-all controls in the EU?**



- 39% - No
- 48% - Yes, <25% of members
- 4% - Yes, 25-50% of members
- 9% - Yes, >50% of members

n=23

**44. Could you please rate the impact of the differences in application/interpretation of catch-all controls in EU Member States on the competitiveness of your members?**

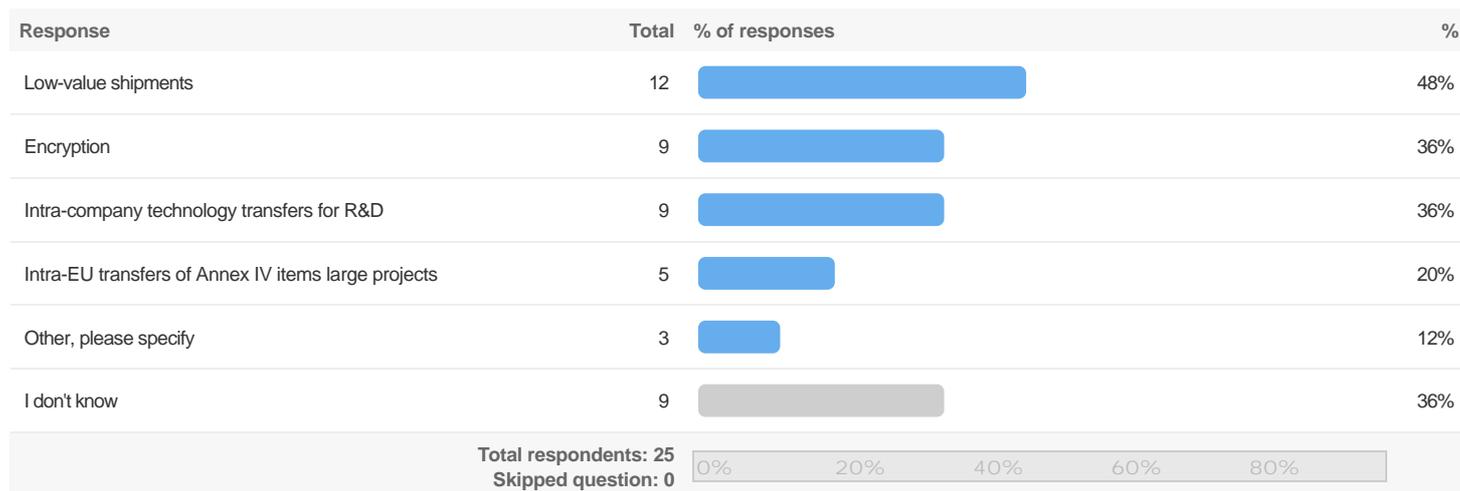
Sub-questions	Resp.	% of responses	avg	med	SD
Company's exports (trade effect)	22	5 (1. Very negative impact), 45 (2. Negative impact), 14 (3. Neutral), 5 (4. Positive impact), 9 (5. Very positive impact), 23 (- I don't know)	2.59	2	1.09
Compliance costs	22	5 (1. Very negative impact), 41 (2. Negative impact), 18 (3. Neutral), 5 (4. Positive impact), 9 (5. Very positive impact), 23 (- I don't know)	2.65	2	1.08
Investment and production	22	32 (2. Negative impact), 36 (3. Neutral), 32 (- I don't know)	2.53	2.5	0.5
Level playing field	22	14 (1. Very negative impact), 41 (2. Negative impact), 14 (3. Neutral), 5 (4. Positive impact), 27 (- I don't know)	2.12	2	0.78
Other, please specify	6	17 (3. Neutral), 17 (5. Very positive impact), 67 (- I don't know)	4	3	1

Average: 2,52 — Median: 2 — Standard Deviation: 0,97

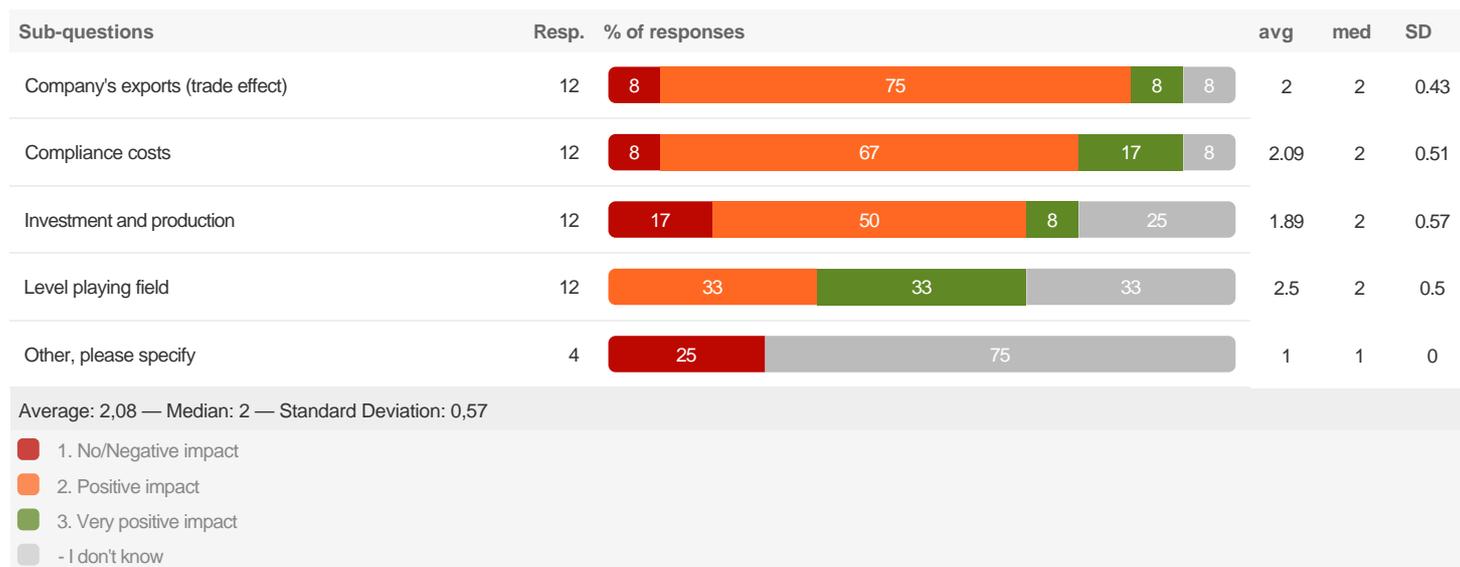
- 1. Very negative impact
- 2. Negative impact
- 3. Neutral
- 4. Positive impact
- 5. Very positive impact
- I don't know

Review issue 'Optimisation of licensing architecture' To optimise the licensing architecture in the EU, a number of review actions are under consideration, including the introduction of additional European Union General Export Authorisations (EUGEAs), which are trade facilitation measures that exempt certain exports to specified destinations from individual licensing requirements and only require reporting of these exports by the exporter.

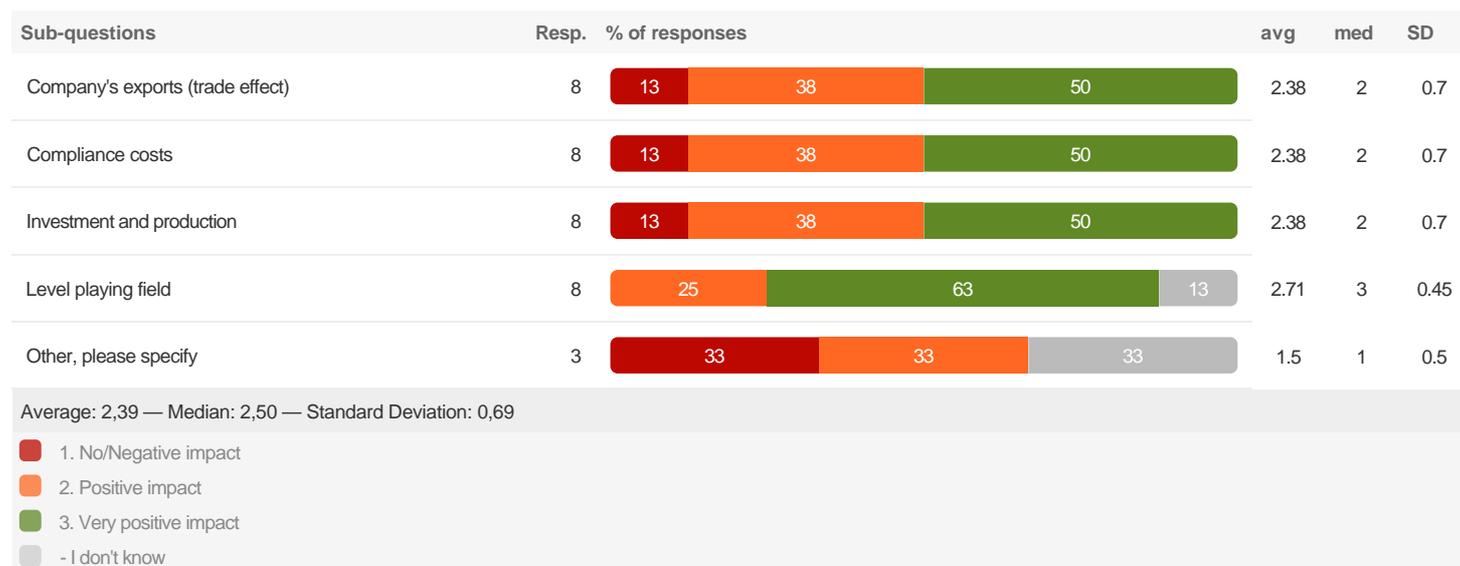
**45. Please select from which of the following EU General Export Authorisations the members of your association would expect to highly benefit.**



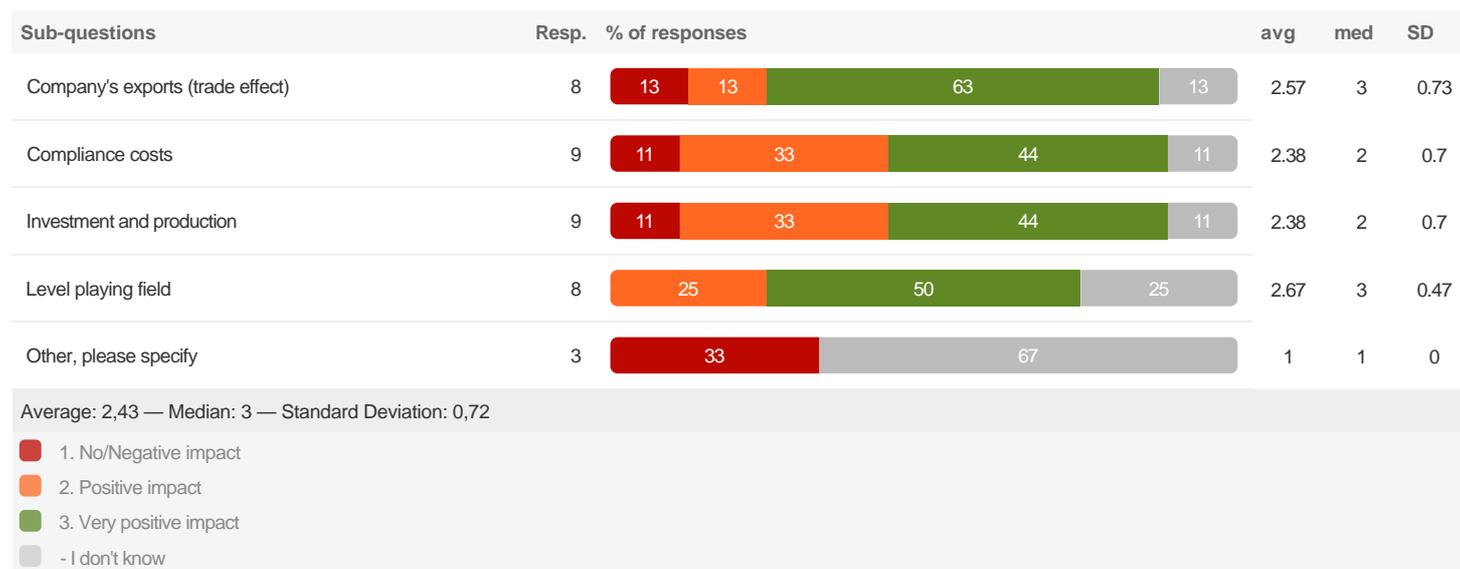
**46. Could you please rate the economic impact of the introduction of an EU General Export Authorisation for low-value shipments on the following aspects?**



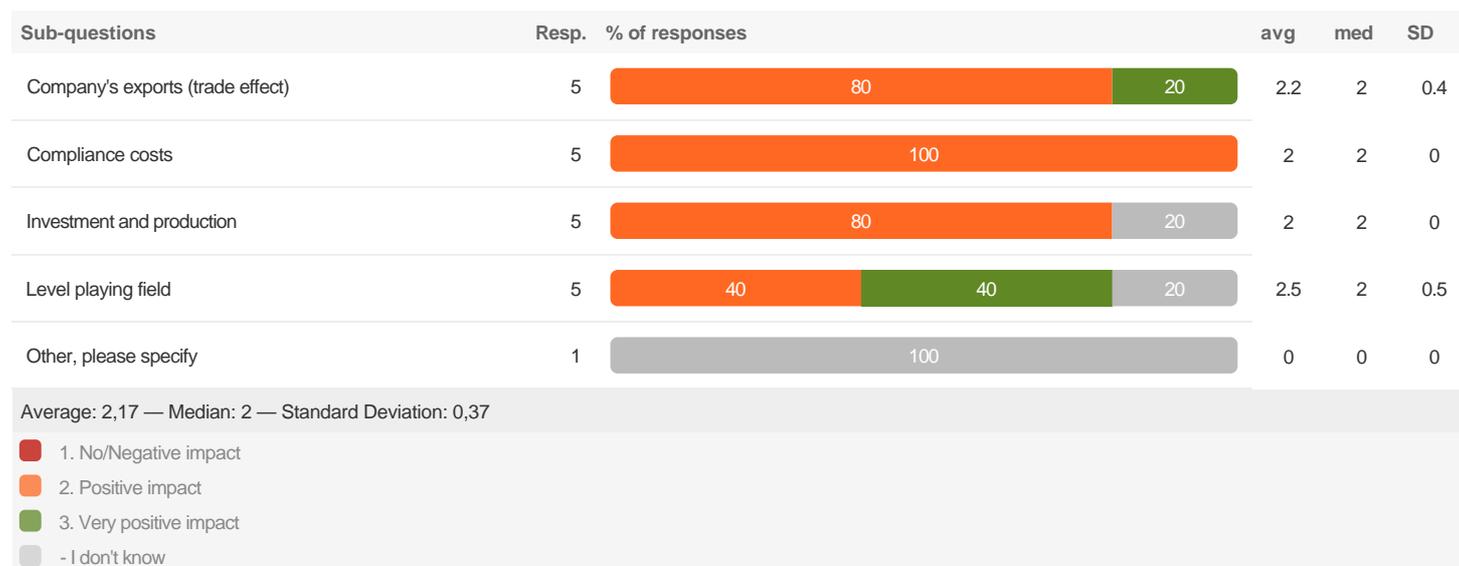
**47. Could you please rate the economic impact of the introduction of an EU General Export Authorisation for encryption on the following aspects?**



**48. Could you please rate the economic impact of the introduction of an EU General Export Authorisation for intra-company technology transfers for R&D on the following aspects?**

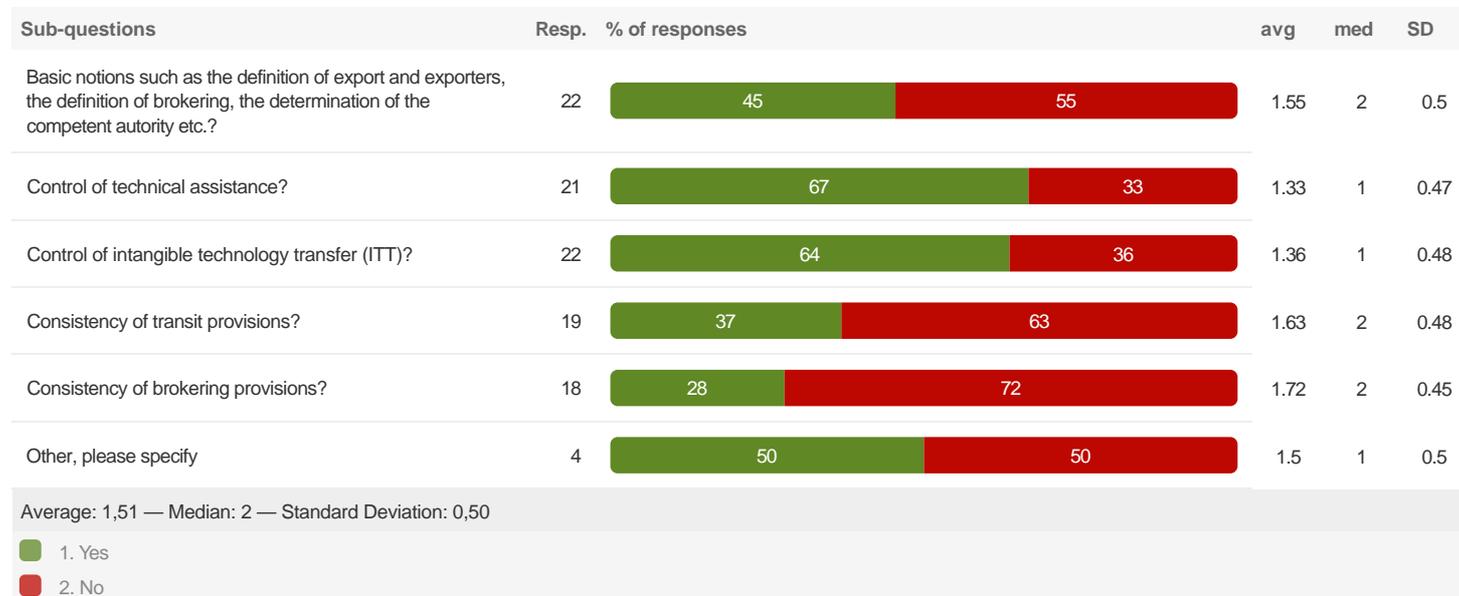


**49. Could you please rate the economic impact of the introduction of an EU General Export Authorisation for intra-EU transfers of Annex IV items large projects on the following aspects?**



Review issue 'Legal clarifications/amendments' Under the heading of an EU system update involving changes to existing regulations a number of legal clarifications and amendments are being considered.

**50. Do you see a need for legal clarification on:**



**50B. If yes, which changes would you propose and why?**

If yes, which changes would you propose and why?	Total	% of total respondents	%
Basic notions such as the definition of export and exporters, the definition of brokering, the determination of the competent authority etc.?	3		4%
Control of technical assistance?	4		6%
Control of intangible technology transfer (ITT)?	3		4%
Consistency of transit provisions?	1		1%
Consistency of brokering provisions?	1		1%
Other, please specify	2		3%

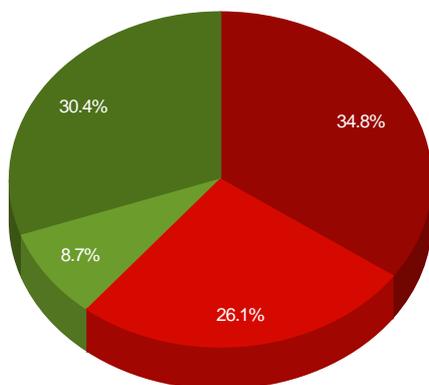
Total respondents: 4  
Skipped question: 21



Review option 'EU system modernisation' This review option covers the modernisation of existing controls, including adding a new dimension for controlling exports of cyber-surveillance technologies. This would potentially involve: Apply human security criteria to exports of cyber-surveillance technologies Obligatory self-regulation on the part of industry producing cyber-surveillance technologies Introduction of EU autonomous list for cyber-surveillance technologies Via technical or descriptive list Introduction of EU cyber-surveillance catch-all mechanism Dedicated catch-all for cyber-surveillance technologies or application of general catch-all

No agreed definition of 'cyber-surveillance technologies' has been created at the EU level thus far, but it could potentially include certain types of the following technologies: Mobile telecommunications interception or jamming equipment IP Network Surveillance Systems Intrusion Software Lawful Intercept data retention and mediation Big data and analytics Digital forensics Location tracking devices Biometrics

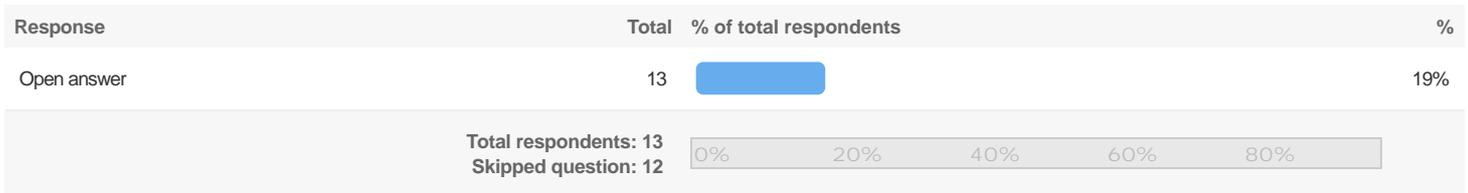
**51. What would be the effects of introducing the above elements on export controls of cyber-surveillance technologies on members of your association?**



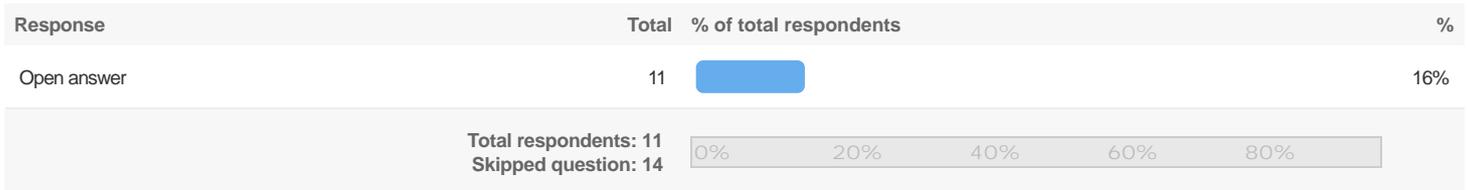
- 35% - Our members do not produce any cyber-surveillance technologies
- 26% - Only a very small share of our members produces cyber-surveillance technologies, overall the impact on our members will be very small
- 9% - A significant share of our members produce cyber-surveillance technologies and would be affected, but the effects are not expected to be large
- 30% - A significant share of our members produce cyber-surveillance technologies and would be affected, it will affect their competitiveness negatively

n=23

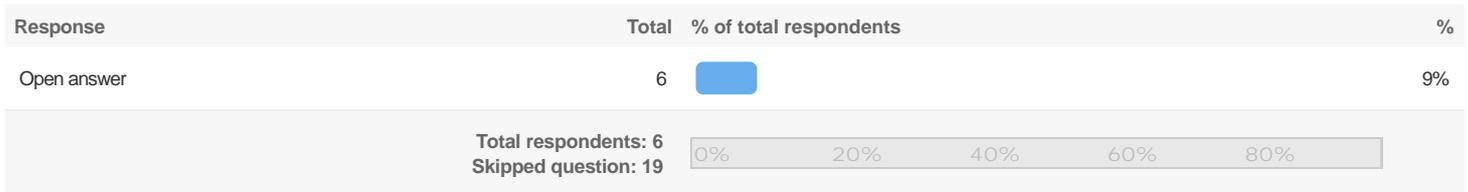
**52. Please list the review actions which are perceived to have a strong positive economic impact on your members.**



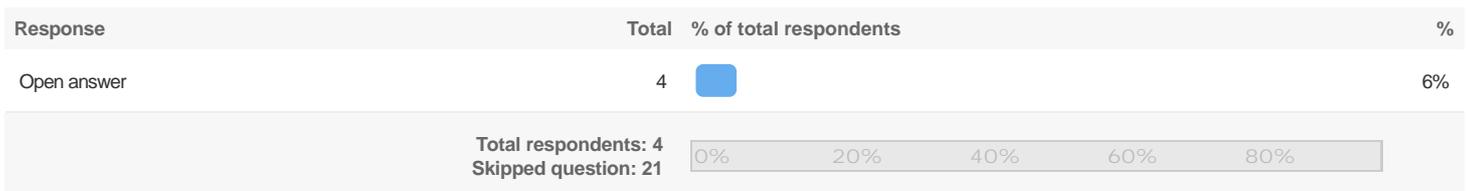
**53. Please list the review actions which are perceived to have a strong negative economic impact on your members.**



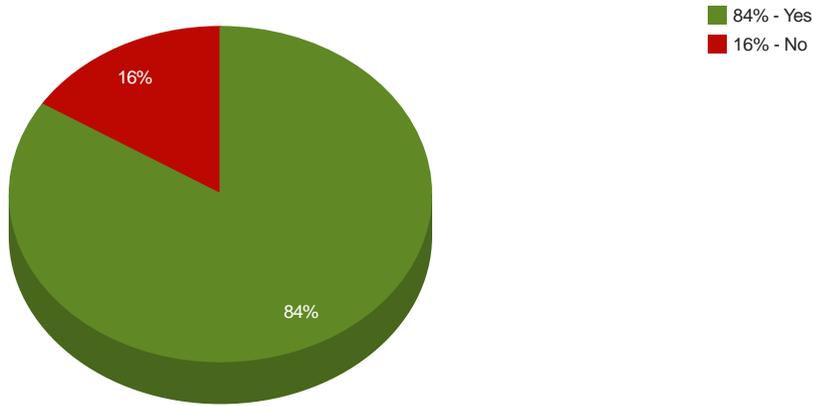
**54. Please list the review actions which are perceived to have a strong positive security impact on your members.**



**55. Please list the review actions which are perceived to have a strong negative security impact on your members.**

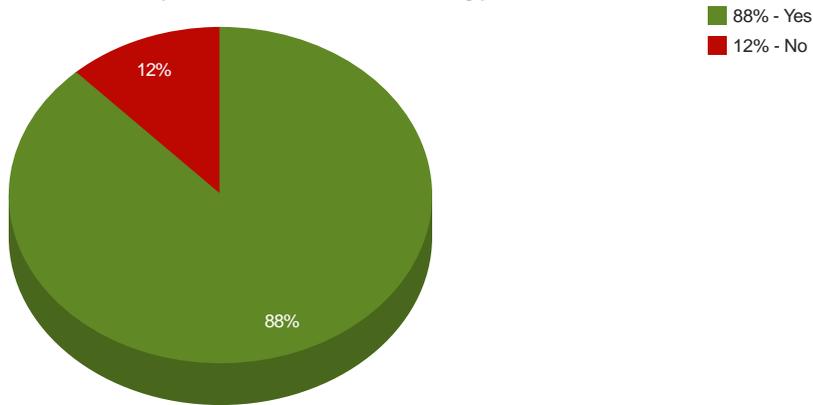


56. Could you please indicate if we can use the name of your organisation for: Providing a list of respondents (without the answers) to the EC?



n=25

57. Could you please indicate if we can use your contact details for: Contacting you for further contribution to the study?



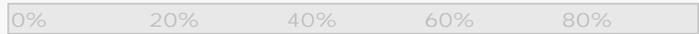
n=25

58. Please enter the name of your organisation:

Response	Total	% of total respondents	%
Open answer	21	<div style="width: 30%;"></div>	30%

Association European Industry Manufacturing

Total respondents: 21  
Skipped question: 1



59. Please enter the email address on which we may contact you for further contribution to the study:

Response	Total	% of total respondents	%
Open answer	22	<div style="width: 31%;"></div>	31%

com de org

Total respondents: 22  
Skipped question: 0





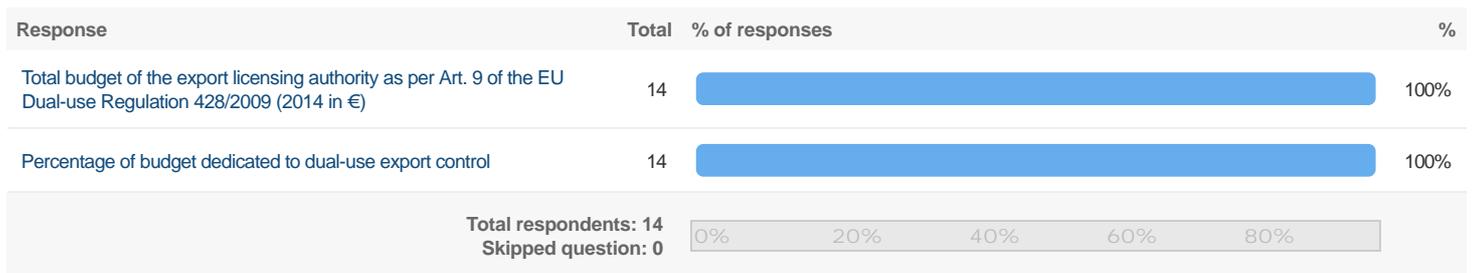
# Export controls - Licensing authorities

Status:	<b>Closed</b>	Partial completes:	<b>0 (0%)</b>
Start date:	<b>01-06-2015</b>	Screened out:	<b>0 (0%)</b>
End date:	<b>05-07-2015</b>	Reached end:	<b>14 (100%)</b>
Live:	<b>35 days</b>	Total responded:	<b>14</b>
Questions:	<b>51</b>		

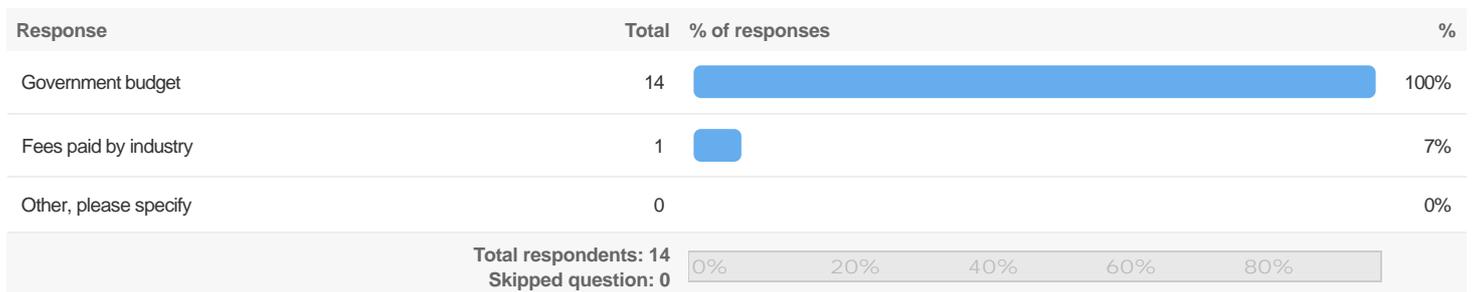
## 1. Current system

### Resources dedicated to dual-use export control

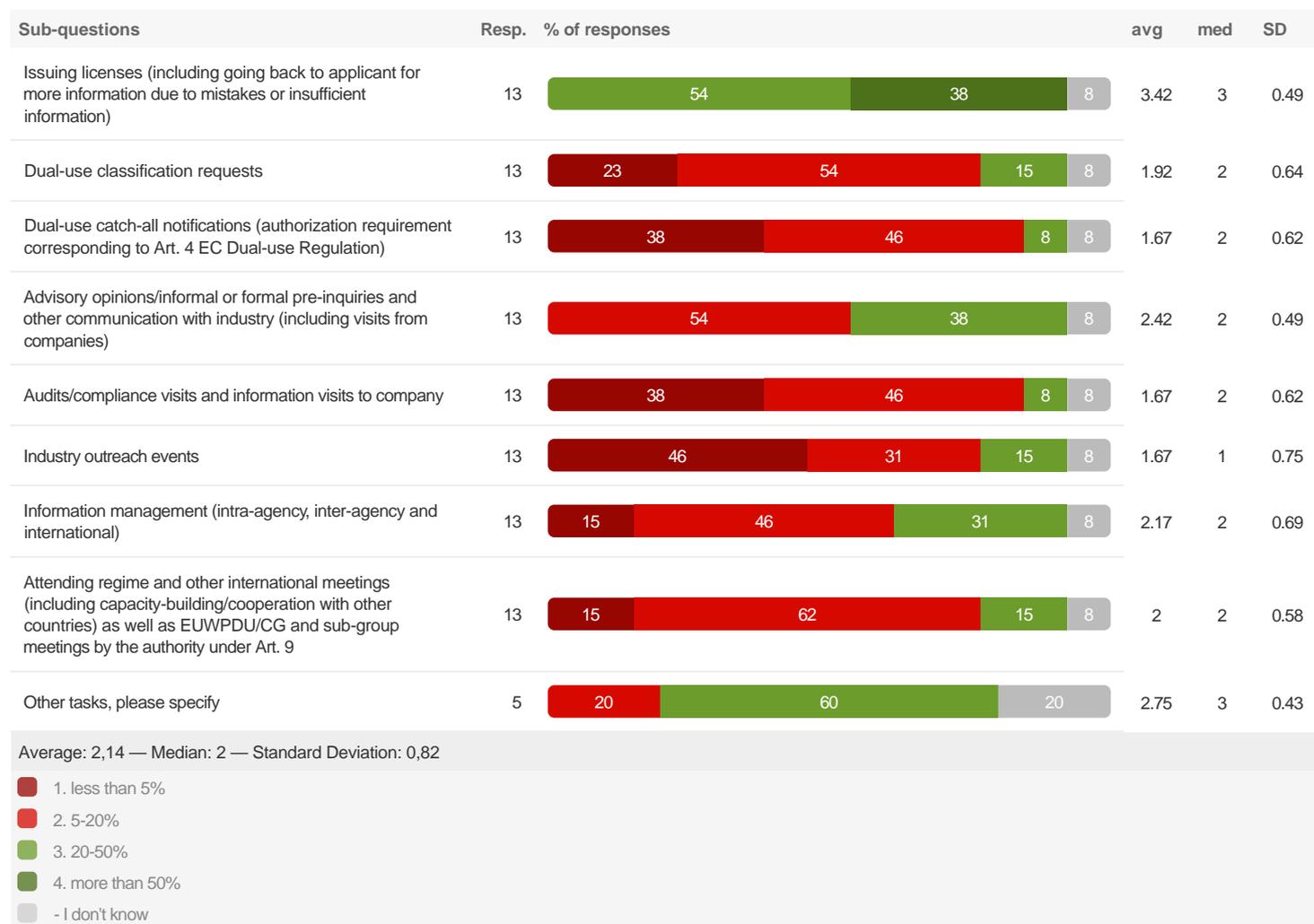
#### 1. Could you please specify the total resources dedicated to dual-use export control and related activities?



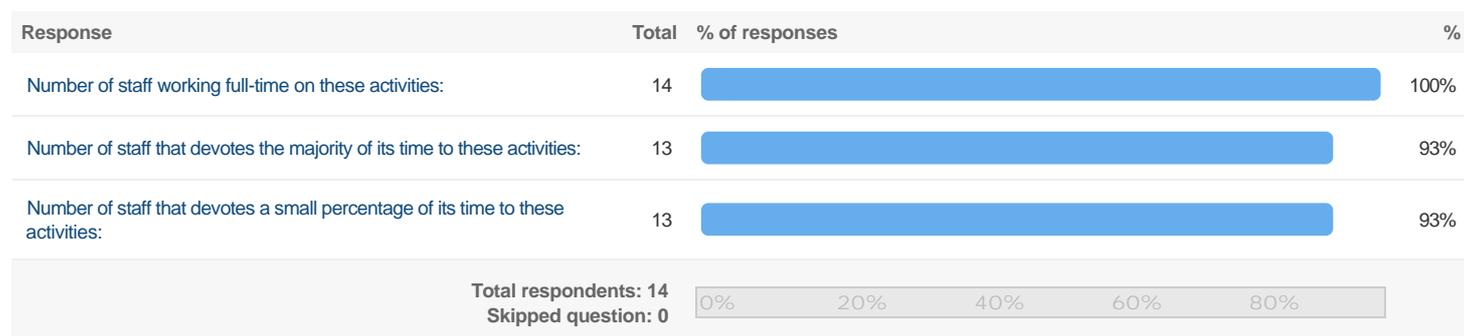
#### 2. Could you please specify the source of your revenue?



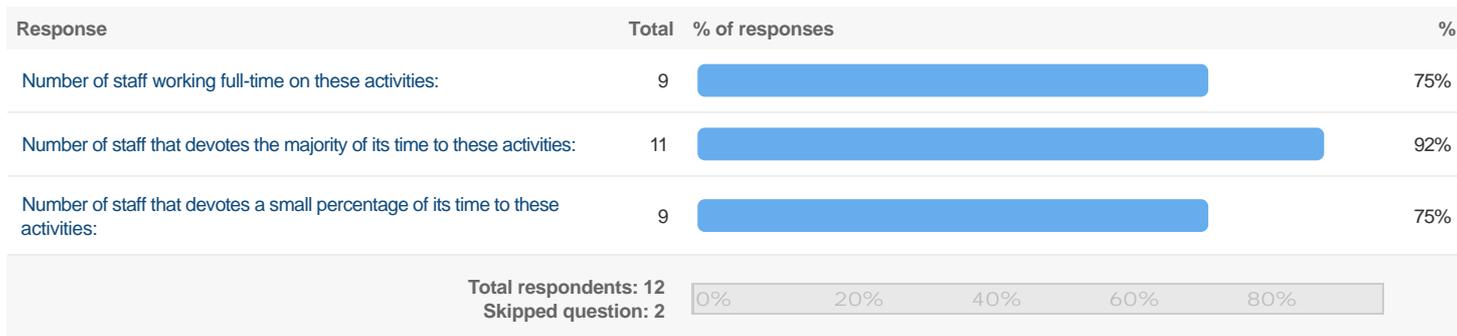
**3. Could you indicate the share of total resource (budget, including staff costs) dedicated to dual-use export control per activity listed below (in approximate percentage terms or range) for 2014, referring to the licensing authority as per Art. 9:**



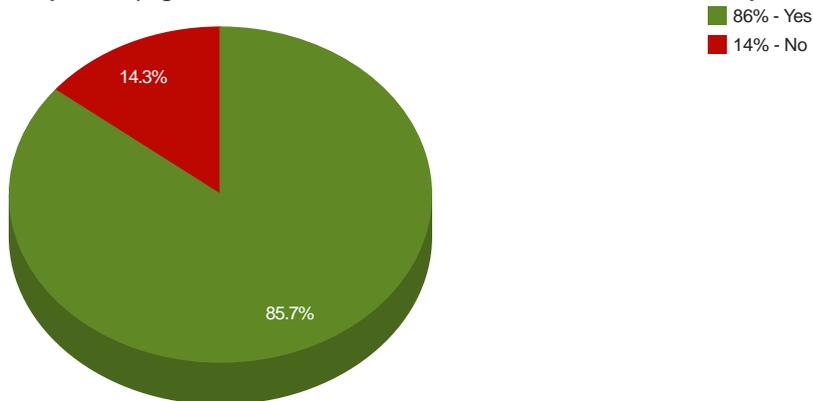
**4. How many staff in your organisation are involved in the activities listed under the previous question (including licensing processing, legal, technical, and/or policy)?**



**5. Do you have an estimate of combined staff time from other government departments, agencies and ministries in relation to the implementation and enforcement of the dual-use regulation?**

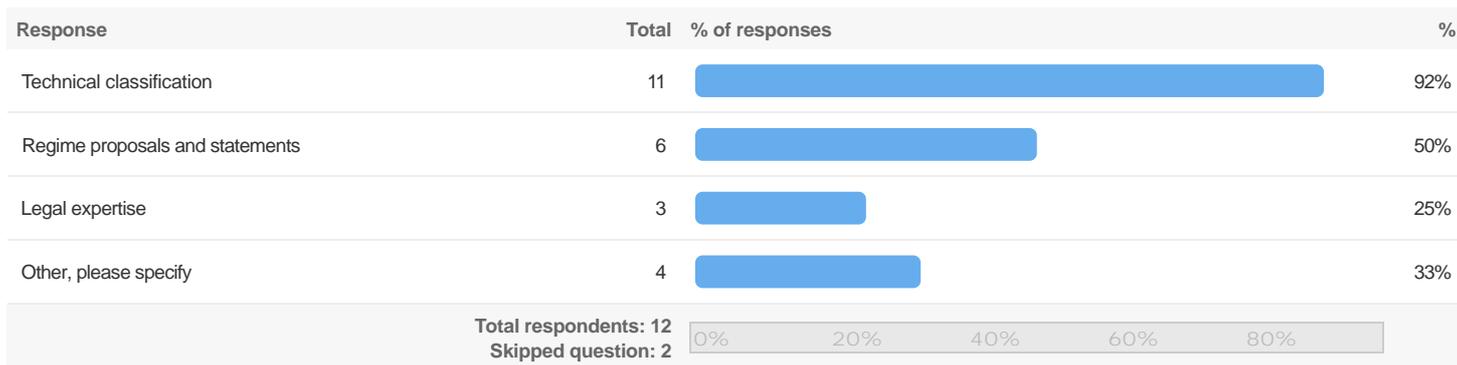


**6. Do you use external expertise (e.g. from other EU Member States, other authorities or private sector)?**

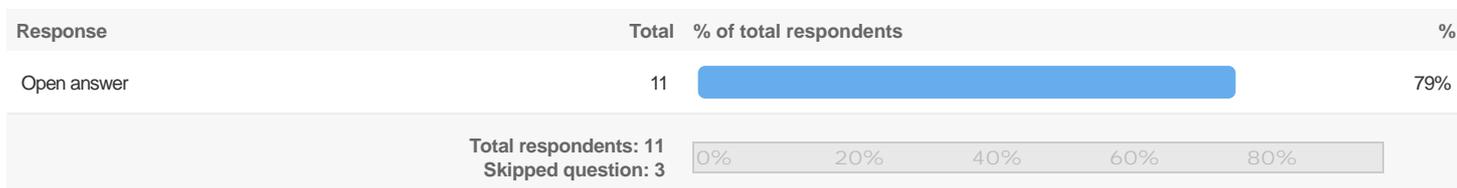


n=14

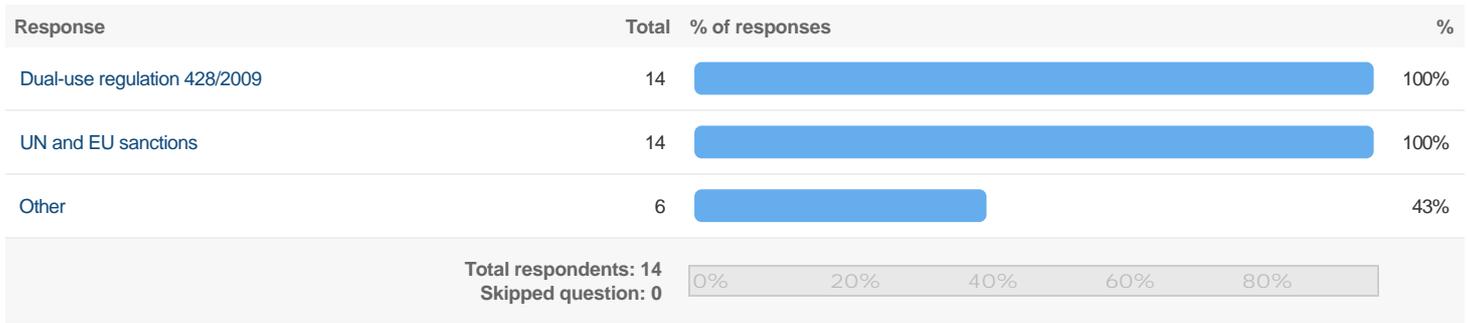
**7. You indicated you use external expertise. To which parts of the process does this mainly relate?**



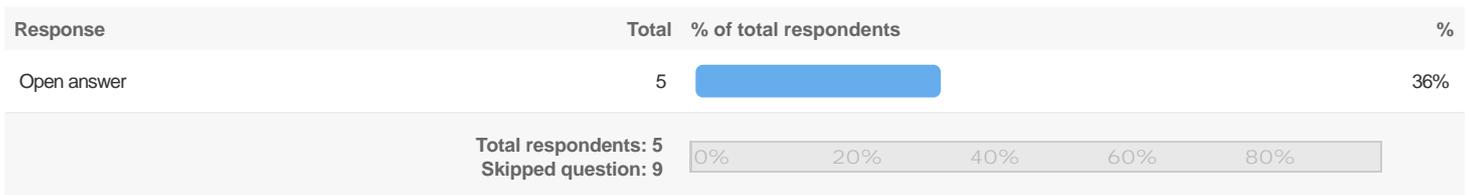
**8. What are the costs of these services as a percentage of your licensing authority's overall dual-use budget in 2014?**



**9. How do overall dual-use related costs relate to the scope of the current legislation in approximate percentage or percentage range for 2014?**

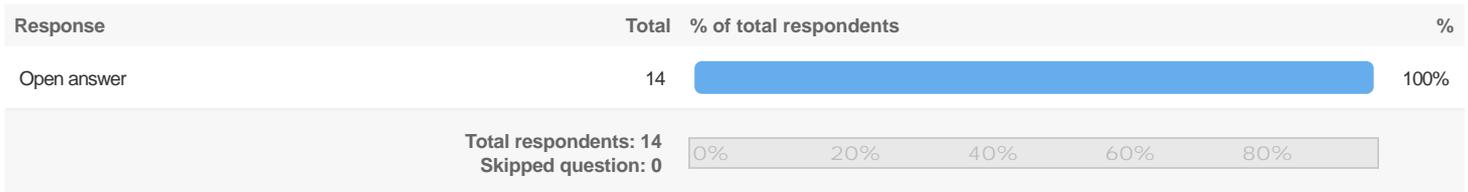


**10. You selected 'Other'. Could you please specify this answer below?**



Implementation challenges

**11. What are the main challenges linked to the management of dual-use export controls based on the EU Dual-use Regulation 428/2009 (e.g. staff resources)?**

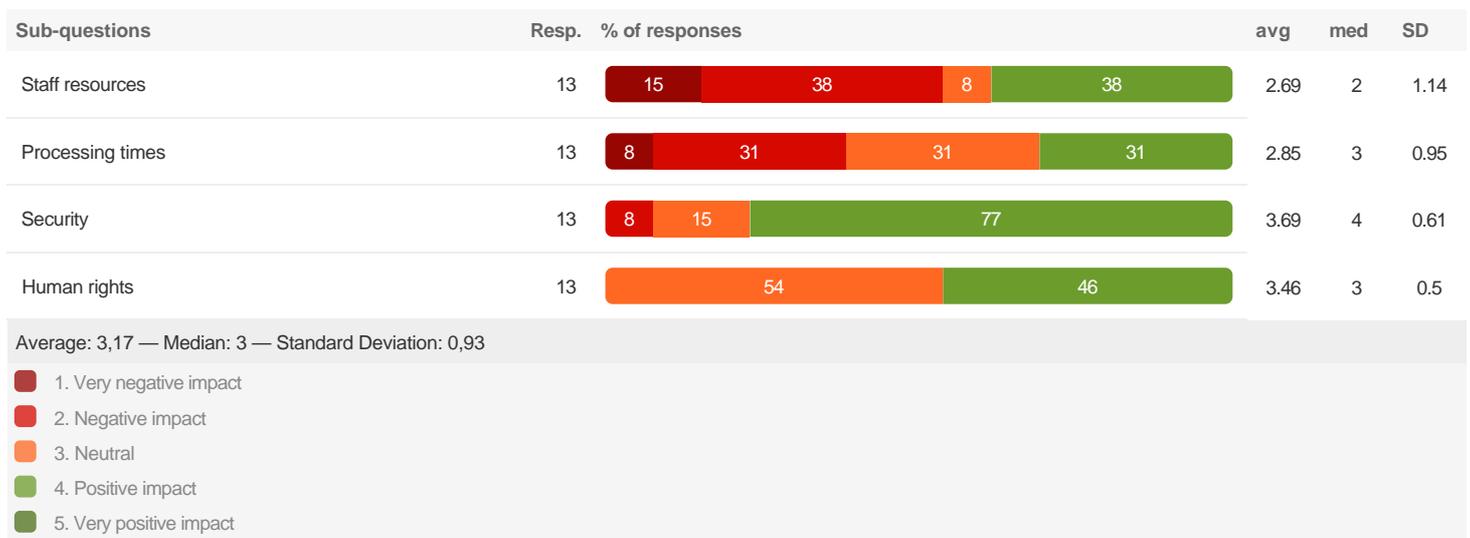


2. Review options

Review option 2: Implementation and enforcement support

Review issue 2.1: Develop EU export control network  
 Review actions:  
 2.1.1 Enhance information exchange and develop IT infrastructure  
 On licensing data  
 On other information e.g. destinations, end-users, incidents and violations  
 Use DUEs to this purpose  
 Share information between and with enforcement agencies through an EU-wide exchange system (see also 2.1.2)  
 Develop standardised IT support tools and electronic licensing systems across the EU (see also 3.3.6)  
 2.1.2 Enhance strategic and operational cooperation with enforcement agencies  
 Integrate export control priorities in policy cycles  
 Develop common risk management tools and framework  
 Implement joint operations  
 Enhance enforcement of transit provisions  
 Enhance enforcement of brokering provisions  
 2.1.3 Training/capacity-building (EU-wide capacity-building programme and training for officials and further develop EU pool of experts)

**12. Please rate the impact of these review actions in terms of administrative burden for your authority, as well as in terms of human rights and security:**



**13. With respect to staff resources, please rate the impact of these review actions on the following aspects:**



#### 14. Please indicate which of the specific actions affect you most positively/negatively:

Sub-questions	Resp.	% of responses	avg	med	SD
2.1.1.a Enhance information exchange and develop IT infrastructure on licensing data	9	33 / 67	1.67	2	0.47
2.1.1.b Enhance information exchange and develop IT infrastructure on other information e.g. destinations, end-users, incidents and violations	10	20 / 80	1.8	2	0.4
2.1.1.c Enhance information exchange and develop IT infrastructure: Use DUES to this purpose	9	0 / 100	2	2	0
2.1.1.d Enhance information exchange and develop IT infrastructure: Share information between and with enforcement agencies through an EU-wide exchange system (see also 2.1.2)	8	25 / 75	1.75	2	0.43
2.1.1.e Enhance information exchange and develop IT infrastructure: Develop standardised IT support tools and electronic licensing systems across the EU (see also 3.3.6)	6	17 / 83	1.83	2	0.37
2.1.2.a Enhance strategic and operational cooperation with enforcement agencies: Integrate export control priorities in policy cycles	7	29 / 71	1.71	2	0.45
2.1.2.b Enhance strategic and operational cooperation with enforcement agencies: Develop common risk management tools and framework	10	10 / 90	1.9	2	0.3
2.1.2.c Enhance strategic and operational cooperation with enforcement agencies: Implement joint operations	7	29 / 71	1.71	2	0.45
2.1.2.d Enhance strategic and operational cooperation with enforcement agencies: Enhance enforcement of transit provisions	7	29 / 71	1.71	2	0.45
2.1.2.e Enhance strategic and operational cooperation with enforcement agencies: Enhance enforcement of brokering provisions	4	25 / 75	1.75	2	0.43
2.1.3 Training/capacity-building (EU-wide capacity-building programme and training for officials and further develop EU pool of experts)	9	0 / 100	2	2	0

Average: 1,81 — Median: 2 — Standard Deviation: 0,39

■ 1. Very negatively  
■ 2. Very positively

#### 15. Additional comments:

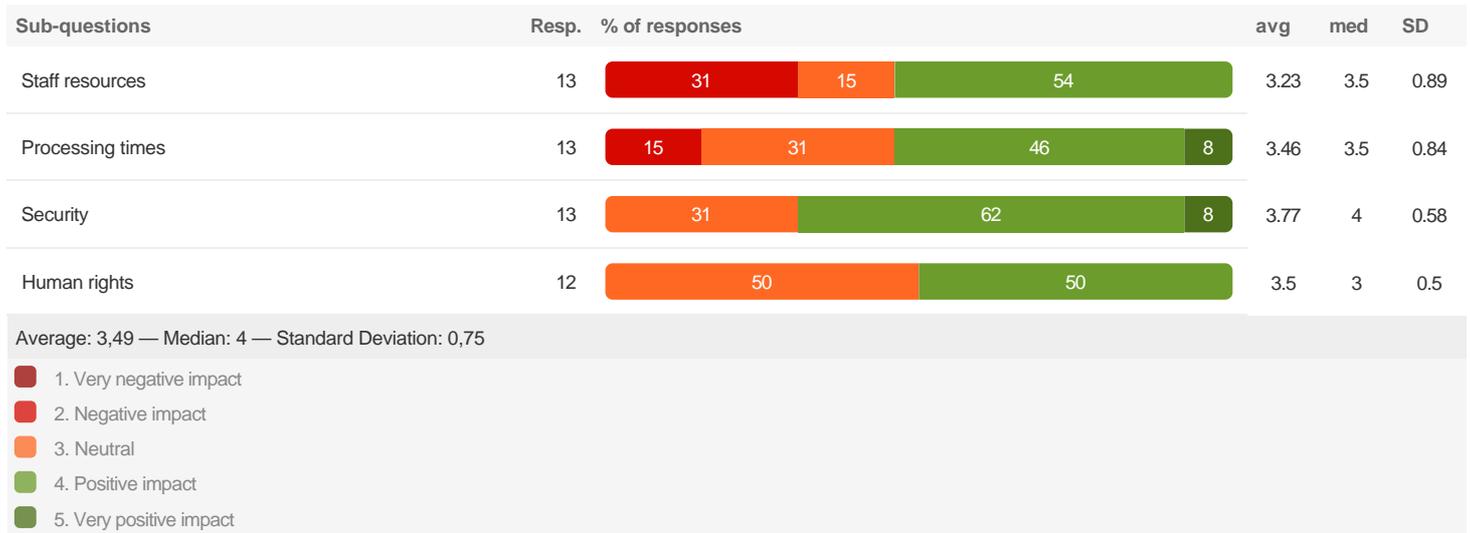
Response	Total	% of total respondents	%
Open answer	6		43%

Total respondents: 6  
Skipped question: 8

0% 20% 40% 60% 80%

Review issue 2.2: Private Sector partnership Review actions: 2.2.1 Due-diligence/ICP requirements through guidelines: Set clear private sector compliance standards for use of simplified mechanisms as a 'substantial benefit' for 'reliable exporters' through guidelines 2.2.2 Transparency: Transparency and coordinated outreach through publication of reports/non-sensitive control information, including guidance on good compliance practices 2.2.3 Promote convergence with the AEO programme

**16. Please rate the impact of these review actions in terms of administrative burden for your authority, as well as in terms of human rights and security:**



**17. With respect to staff resources, please rate the impact of these review actions on the following aspects:**



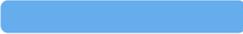
**18. Please indicate which of the specific actions affect you most positively/negatively:**

Sub-questions	Resp.	% of responses	avg	med	SD
2.2.1 Due-diligence/ICP requirements through guidelines: Set clear private sector compliance standards for use of simplified mechanisms as a 'substantial benefit' for 'reliable exporters' through guidelines	11		1.91	2	0.29
2.2.2 Transparency: Transparency and coordinated outreach through publication of reports/non-sensitive control information, including guidance on good compliance practices	6		1.5	1	0.5
2.2.3 Promote convergence with the AEO programme	5		1.4	1	0.49

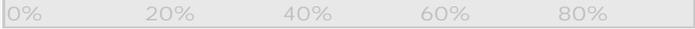
Average: 1,68 — Median: 2 — Standard Deviation: 0,47

- 1. Very negatively
- 2. Very positively

**19. Additional comments:**

Response	Total	% of total respondents	%
Open answer	5		36%

Total respondents: 5  
Skipped question: 9



Review issue 2.3: Strengthen implementation of ITT controls Review actions: 2.3.1 Provide guidance 2.3.2 Outreach to the academic research community 2.3.3 Codes of conduct for scientists

**20. Please rate the impact of these review actions in terms of administrative burden for your authority, as well as in terms of human rights and security:**

Sub-questions	Resp.	% of responses	avg	med	SD
Staff resources	13		2.62	2	0.92
Processing times	13		2.92	3	0.73
Security	13		4	4	0.39
Human rights	13		3.54	3.5	0.5

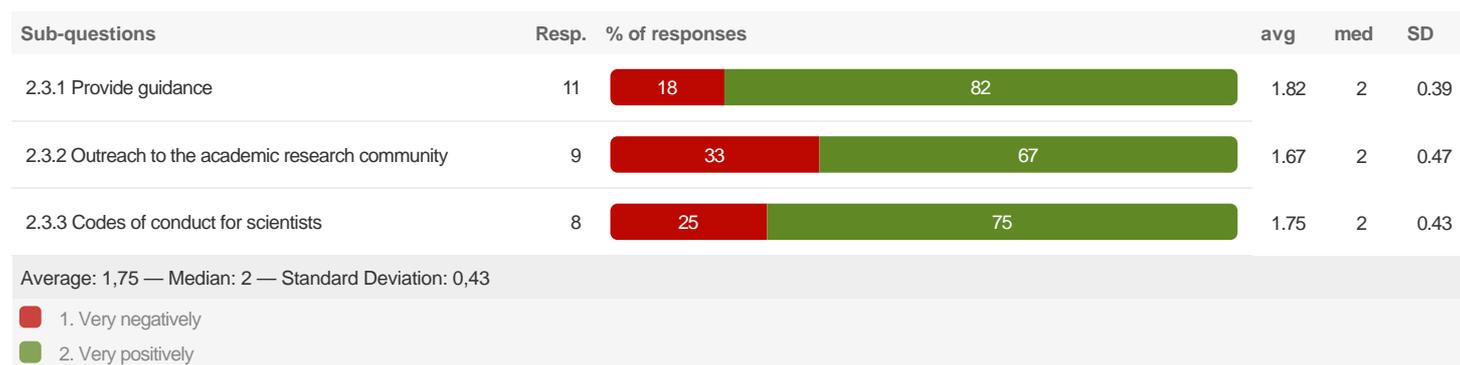
Average: 3,27 — Median: 3 — Standard Deviation: 0,86

- 1. Very negative impact
- 2. Negative impact
- 3. Neutral
- 4. Positive impact
- 5. Very positive impact

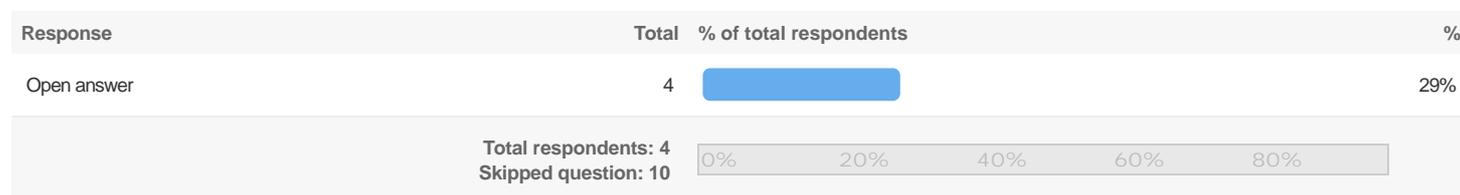
**21. With respect to staff resources, please rate the impact of these review actions on the following aspects:**



**22. Please indicate which of the specific actions affect you most positively/negatively:**



**23. Additional comments:**



Review issue 2.4: Rapid reaction to technological changes and active contribution to control list discussions in regimes Review actions: 2.4.1 'EU technological reaction capacity' mechanism (based on expertise in EU MS authorities and structured engagement with industry) 2.4.2 Guidance on emerging technologies 2.4.3 Set up effective mechanism for regular update of EU control list drawing on MS expertise

**24. Please rate the impact of these review actions in terms of administrative burden for your authority, as well as in terms of human rights and security:**

Sub-questions	Resp.	% of responses	avg	med	SD
Staff resources	13		2.62	2.5	0.84
Processing times	13		3.31	3	0.72
Security	13		3.85	4	0.66
Human rights	13		3.62	3.5	0.62
Average: 3,35 — Median: 3 — Standard Deviation: 0,85					
<ul style="list-style-type: none"> <li><span style="color: #800000;">■</span> 1. Very negative impact</li> <li><span style="color: #FF0000;">■</span> 2. Negative impact</li> <li><span style="color: #FF8C00;">■</span> 3. Neutral</li> <li><span style="color: #90EE90;">■</span> 4. Positive impact</li> <li><span style="color: #6B8E23;">■</span> 5. Very positive impact</li> </ul>					

**25. With respect to staff resources, please rate the impact of these review actions on the following aspects:**

Sub-questions	Resp.	% of responses	avg	med	SD
Information management	13		2.92	3	0.83
Outreach/information to companies	13		2.92	3	1
Licensing	13		3.31	3	0.72
Audits	13		3.15	3	0.53
Other, please specify	0		0	0	0
Average: 3,08 — Median: 3 — Standard Deviation: 0,80					
<ul style="list-style-type: none"> <li><span style="color: #800000;">■</span> 1. Very negative impact</li> <li><span style="color: #FF0000;">■</span> 2. Negative impact</li> <li><span style="color: #FF8C00;">■</span> 3. Neutral</li> <li><span style="color: #90EE90;">■</span> 4. Positive impact</li> <li><span style="color: #6B8E23;">■</span> 5. Very positive impact</li> </ul>					

**26. Please indicate which of the specific actions affect you most positively/negatively:**

Sub-questions	Resp.	% of responses	avg	med	SD
2.4.1 'EU technological reaction capacity' mechanism (based on expertise in EU MS authorities and structured engagement with industry)	7		1.71	2	0.45
2.4.2 Guidance on emerging technologies	9		1.78	2	0.42
2.4.3 Set up effective mechanism for regular update of EU control list drawing on MS expertise	6		2	2	0
Average: 1,82 — Median: 2 — Standard Deviation: 0,39					
<ul style="list-style-type: none"> <li>1. Very negatively</li> <li>2. Very positively</li> </ul>					

**27. Additional comments:**

Response	Total	% of total respondents	%
Open answer	3		21%
Total respondents: 3		Skipped question: 11	

Review issue 2.5: Promote global convergence of export controls Review actions: 2.5.1 Promote coherent, comprehensive, unified EU representation in the regimes 2.5.2 Active outreach, cooperation and assistance to partner countries 2.5.3 Develop export control dialogues with key trading partners: To avoid 'conflicting regulatory requirements' and reduce 'administrative burden on export-oriented industries'

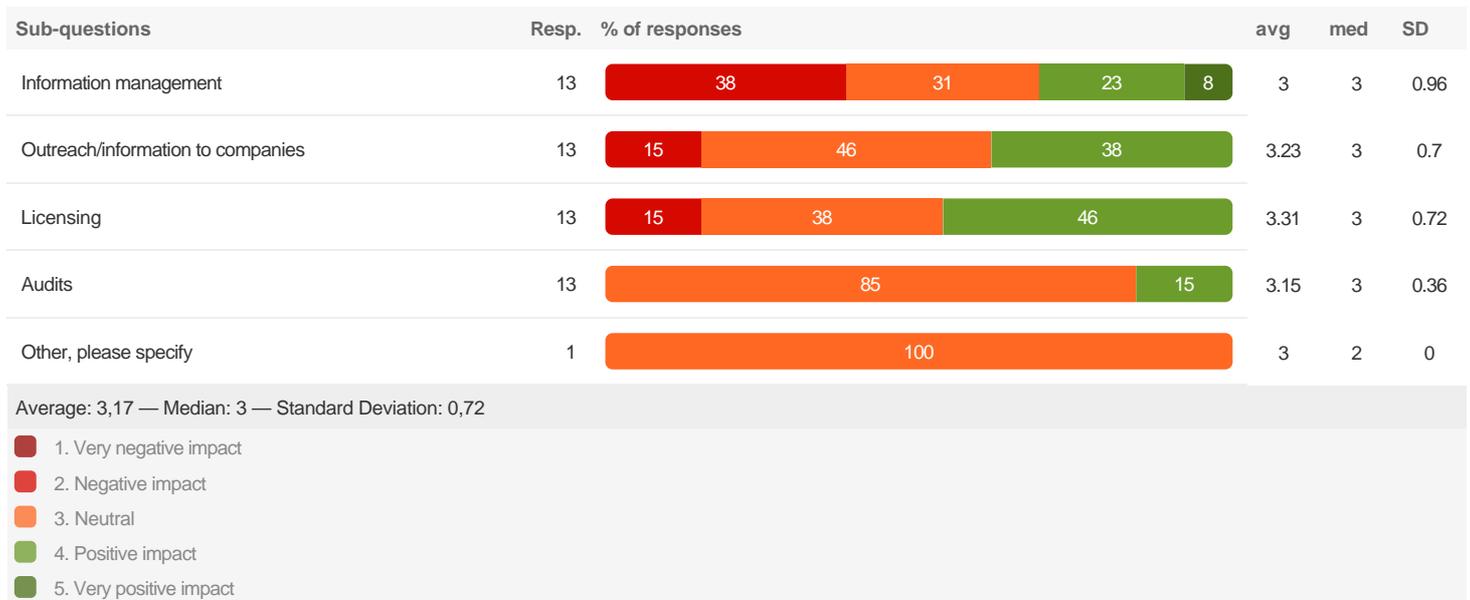
**28. Please rate the impact of these review actions in terms of administrative burden for your authority, as well as in terms of human rights and security:**

Sub-questions	Resp.	% of responses	avg	med	SD
Staff resources	13		3	3	1.18
Processing times	13		3.08	3	0.62
Security	13		3.77	4	0.8
Human rights	13		3.46	3	0.5

Average: 3,33 — Median: 3 — Standard Deviation: 0,87

- 1. Very negative impact
- 2. Negative impact
- 3. Neutral
- 4. Positive impact
- 5. Very positive impact

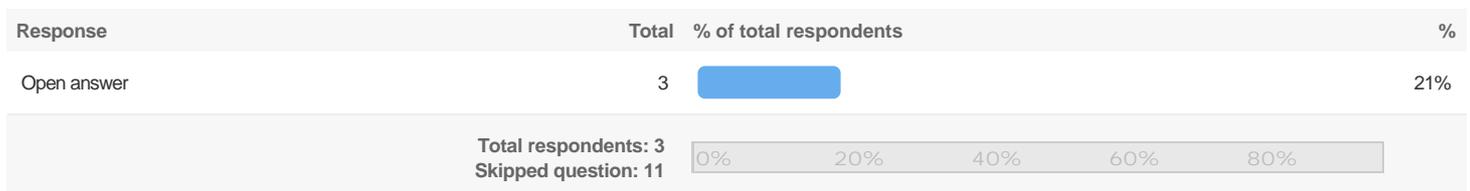
**29. With respect to staff resources, please rate the impact of these review actions on the following aspects:**



**30. Please indicate which of the specific actions affect you most positively/negatively:**



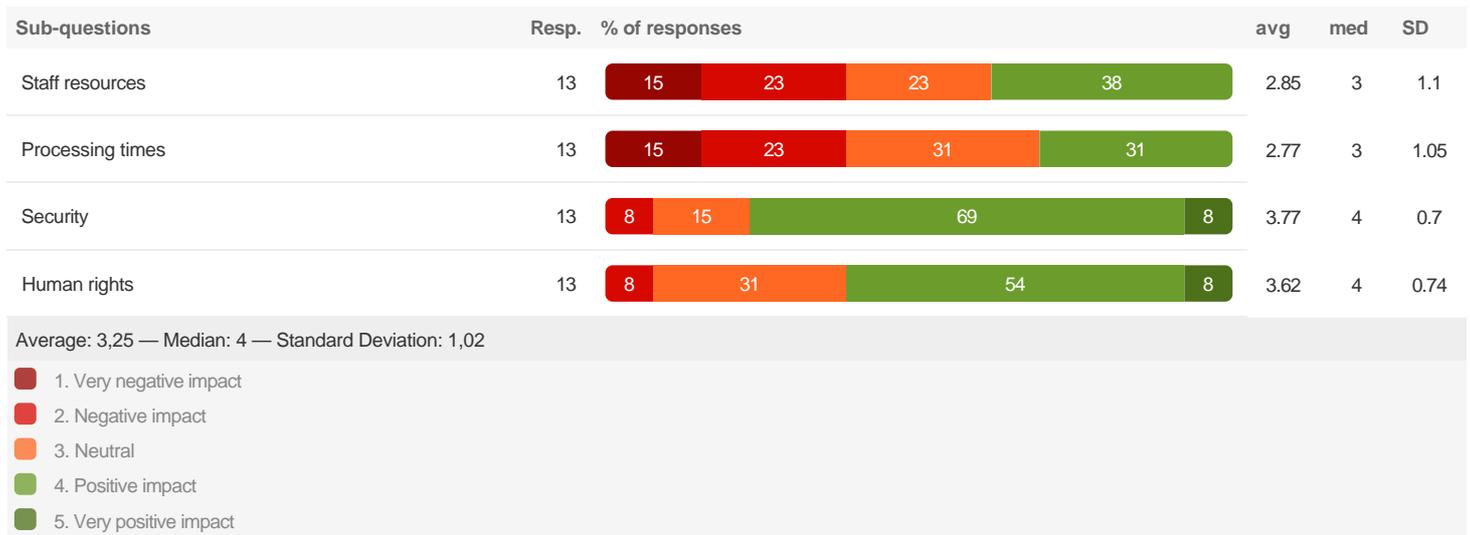
**31. Additional comments:**



Review option 3: EU system update (option 2+ upgrades of existing regulations)

Review issue 3.1: Catch-all convergence Review actions: 3.1.1 Definition: Harmonise notion of catch-all controls across the EU 3.1.2 Information exchange: Regular information exchange and establish EU catch-all database (partly shared with customs and partly made public and thus accessible to companies) 3.1.3 Consultation process: Strengthen consultation to ensure EU-wide application and reinforce no-undercut policy

**32. Please rate the impact of these review actions in terms of administrative burden for your authority, as well as in terms of human rights and security:**



**33. With respect to staff resources, please rate the impact of these review actions on the following aspects:**



### 34. Please indicate which of the specific actions affect you most positively/negatively:

Sub-questions	Resp.	% of responses	avg	med	SD
3.1.1 Definition: Harmonise notion of catch-all controls across the EU	10		1.8	2	0.4
3.1.2 Information exchange: Regular information exchange and establish EU catch-all database (partly shared with customs and partly made public and thus accessible to companies)	7		1.43	1	0.49
3.1.3 Consultation process: Strengthen consultation to ensure EU-wide application and reinforce no-undercut policy	8		1.62	2	0.48

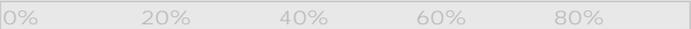
Average: 1,64 — Median: 2 — Standard Deviation: 0,48

- 1. Very negatively
- 2. Very positively

### 35. Additional comments:

Response	Total	% of total respondents	%
Open answer	3		21%

Total respondents: 3  
Skipped question: 11



Review issue 3.2: Critical re-evaluation of EU transfers Review actions: 3.2.1 Review of Annex IV: Update list and reduce to most sensitive items 3.2.2 Introduce EUGEA for intra-EU transfers: Including technology transfers, combined with post-shipment verification

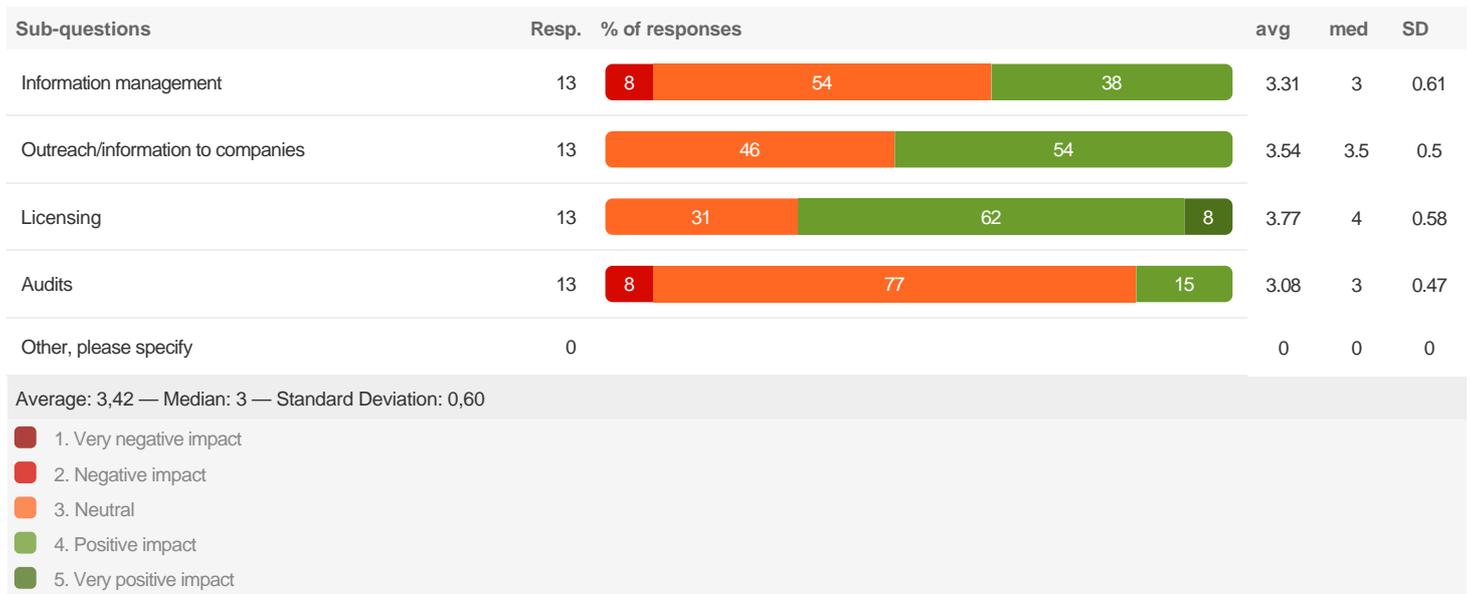
### 36. Please rate the impact of these review actions in terms of administrative burden for your authority, as well as in terms of human rights and security:

Sub-questions	Resp.	% of responses	avg	med	SD
Staff resources	13		3.54	3.5	0.93
Processing times	13		3.69	3.5	0.72
Security	13		3	3	0.39
Human rights	13		2.92	3	0.27

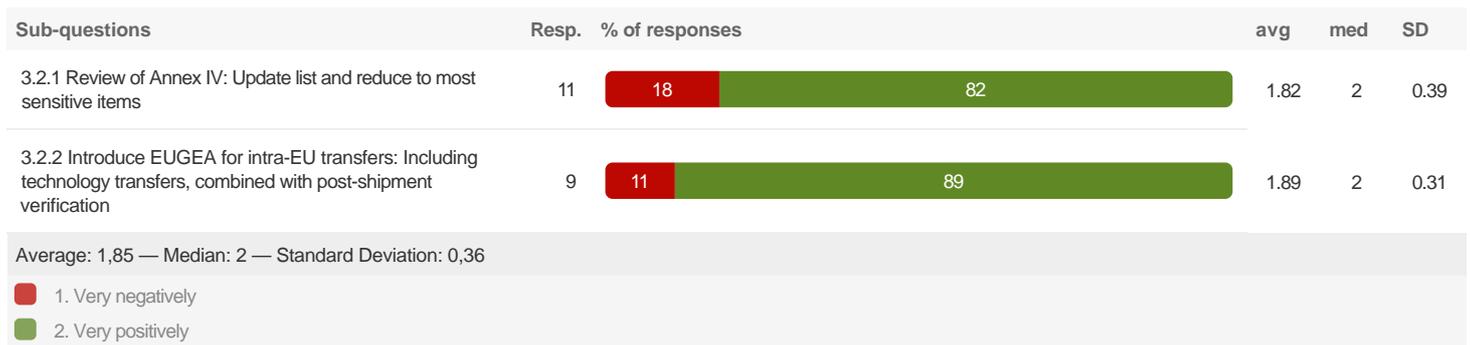
Average: 3,29 — Median: 3 — Standard Deviation: 0,72

- 1. Very negative impact
- 2. Negative impact
- 3. Neutral
- 4. Positive impact
- 5. Very positive impact

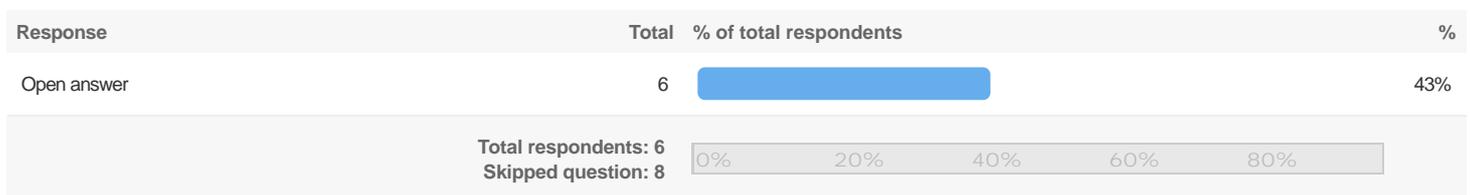
**37. With respect to staff resources, please rate the impact of these review actions on the following aspects:**



**38. Please indicate which of the specific actions affect you most positively/negatively:**

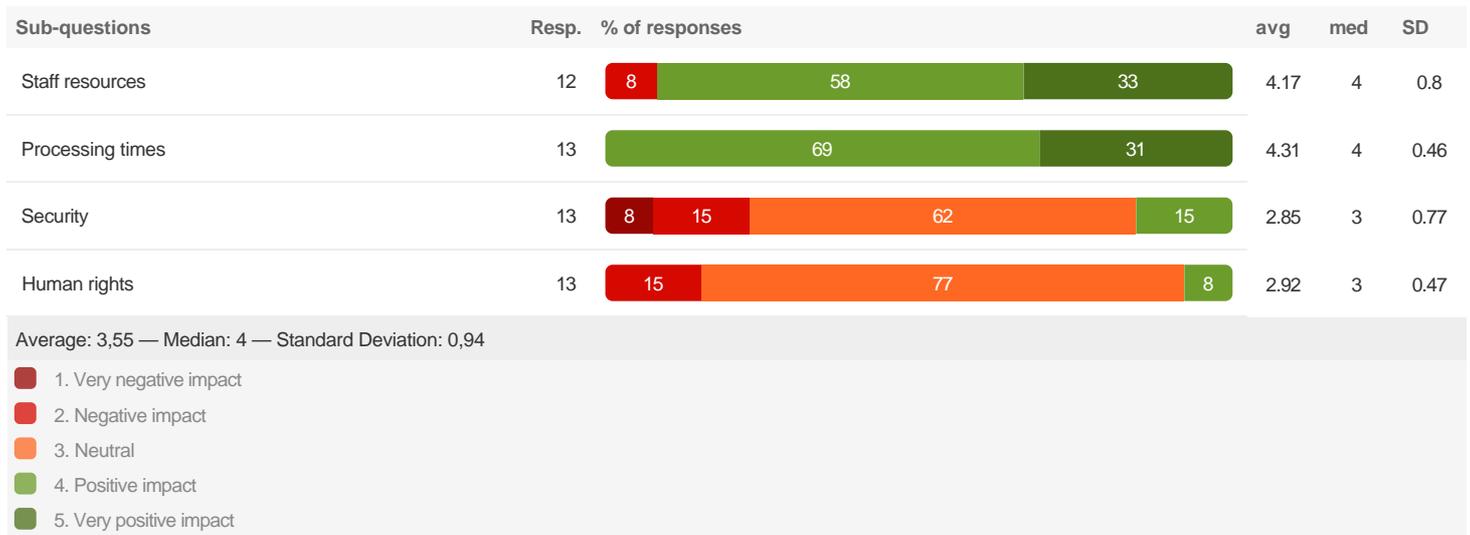


**39. Additional comments:**

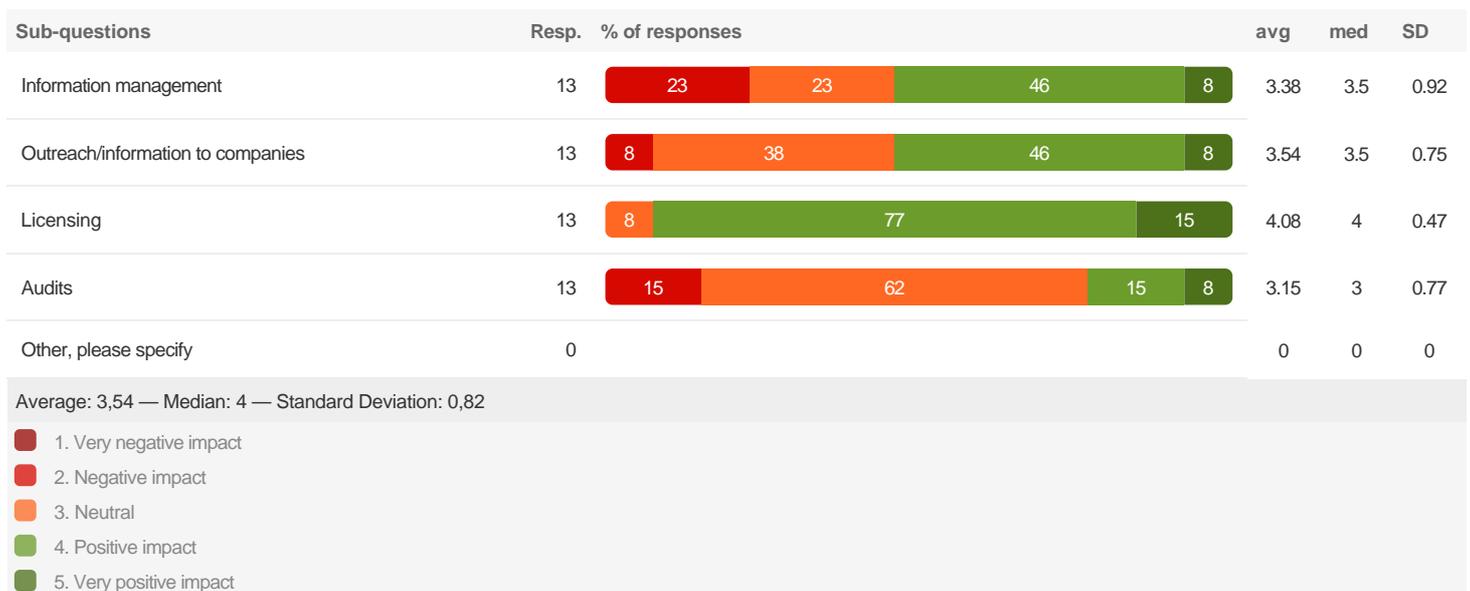


Review issue 3.3: Optimisation of licensing architecture Review actions: 3.3.1 Review parameters for existing EUGEAs 3.3.2 Introduce additional EUGEAs: e.g. for: low-value shipments encryption intra-company technology transfers for R&D intra-EU transfers of Annex IV items large projects 3.3.3 Introduce ITT facilitation tools: e.g. EUGEAs for intra-company research and development), combined with focus on pre-transfer control (registration, self-auditing) and post-transfer monitoring (compliance audits) 3.3.4 Facilitate exports: introduce regular review of NGEAs and discuss possible transformation into EUGEAs 3.3.5 Prepare guidelines for consistent licensing practices: e.g. best practices for processing times 3.3.6 Develop standardised IT support tools and electronic licensing systems across the EU 3.3.7 Shifting emphasis on end-use monitoring

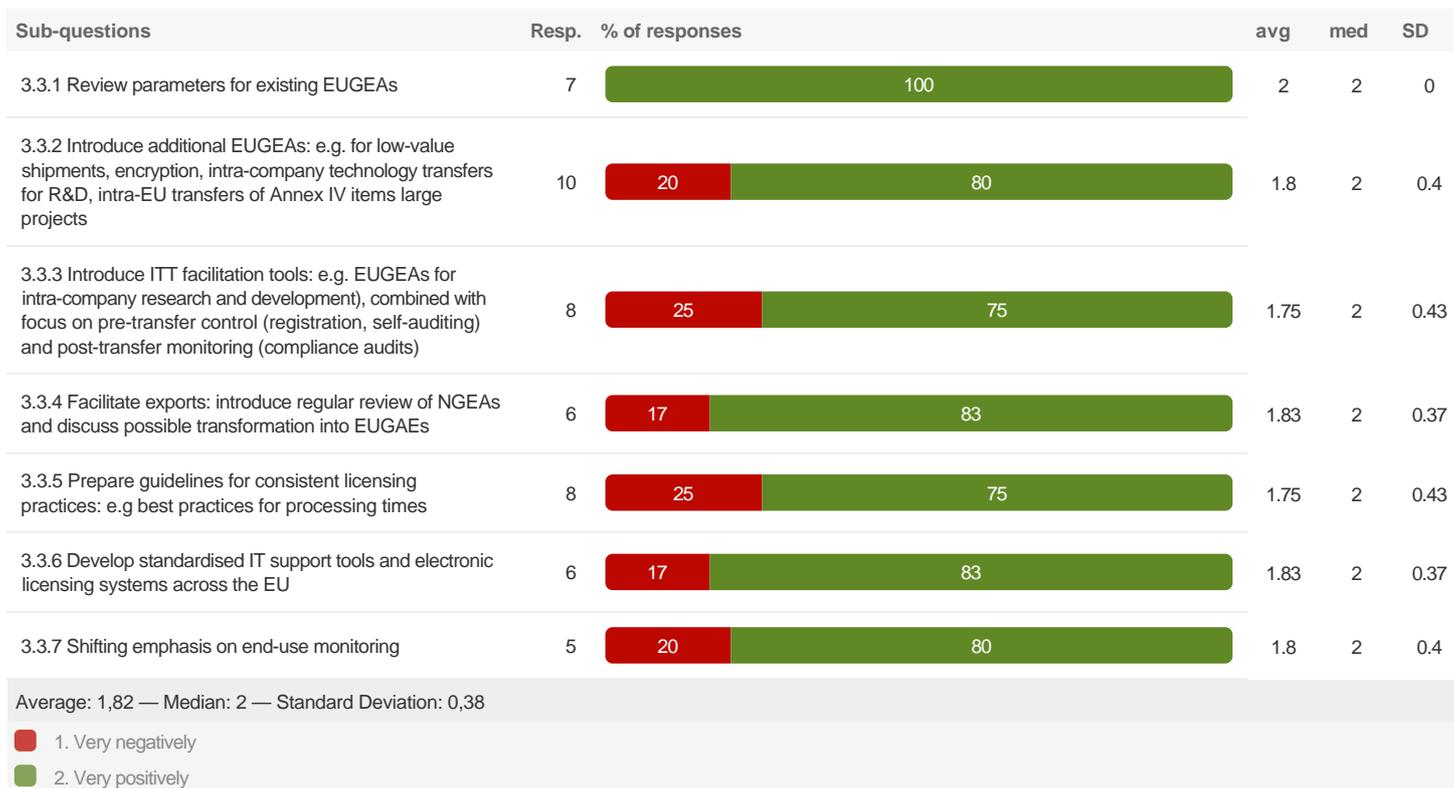
**40. Please rate the impact of these review actions in terms of administrative burden for your authority, as well as in terms of human rights and security:**



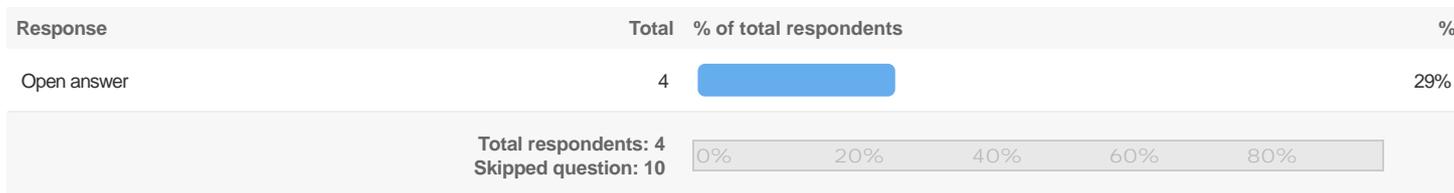
**41. With respect to staff resources, please rate the impact of these review actions on the following aspects:**



#### 42. Please indicate which of the specific actions affect you most positively/negatively:



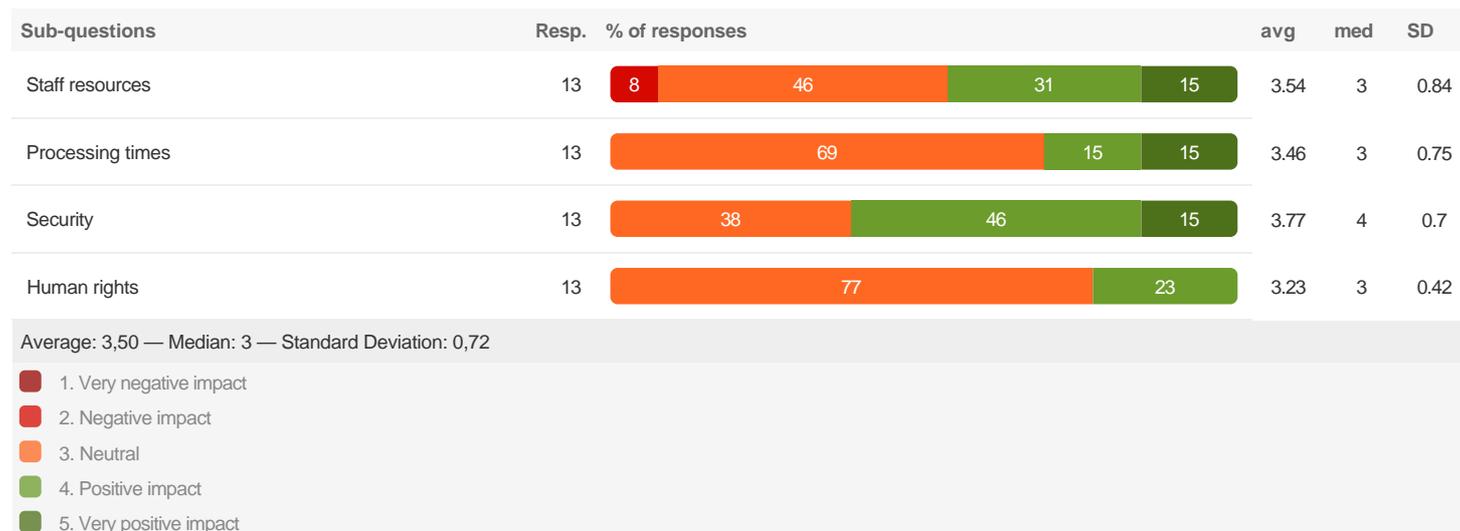
#### 43. Additional comments:



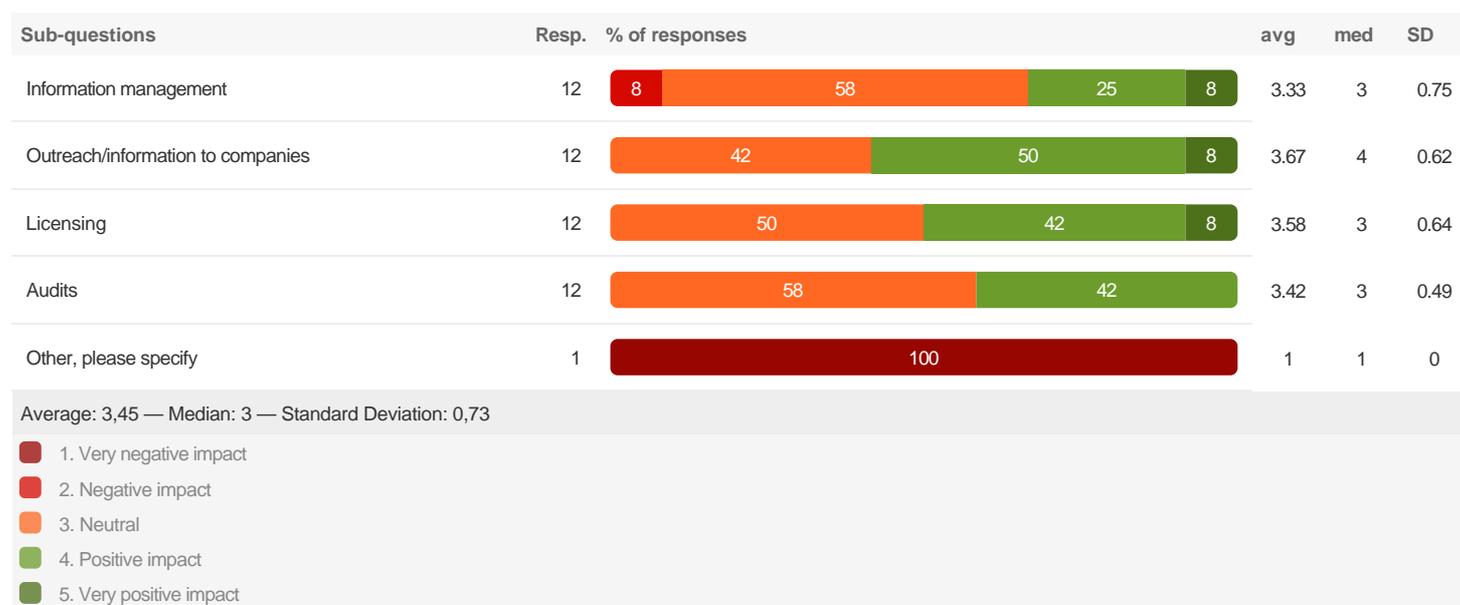
Review issue 3.4: Legal clarifications and amendments Review actions:

- 3.4.1 Clarify notion of export and exporter
- 3.4.2 Review determination of competent authority (especially for non-EU companies)
- 3.4.3 Update control of technical assistance
- 3.4.4 Review/clarify legal framework on ITT controls and adjust control modalities
- 3.4.5 Enhance consistency of transit provisions
- 3.4.6 Enhance consistency of brokering provisions
- 3.4.7 Extraterritorial provisions for EU persons (to prevent circumvention)
- 3.4.8 Legal ICP requirements

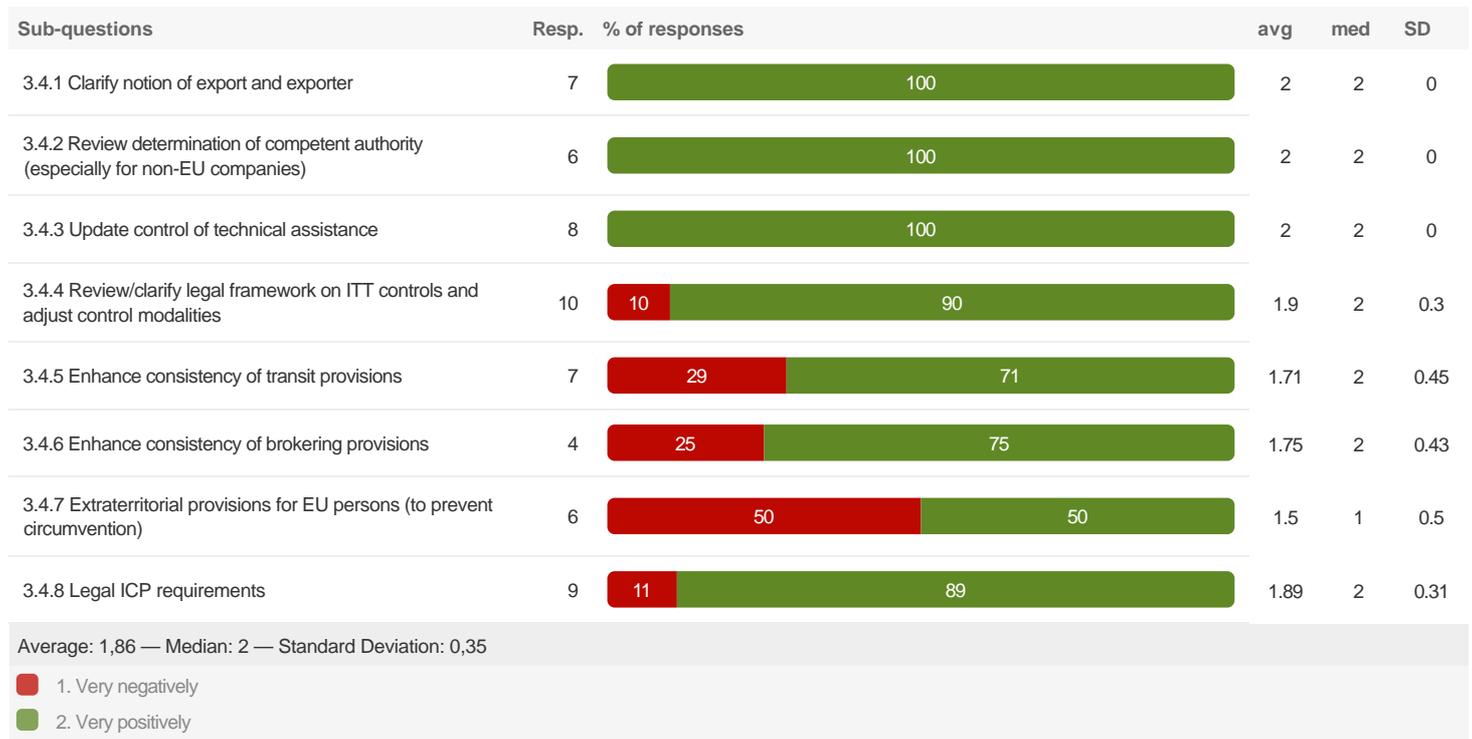
**44. Please rate the impact of these review actions in terms of administrative burden for your authority, as well as in terms of human rights and security:**



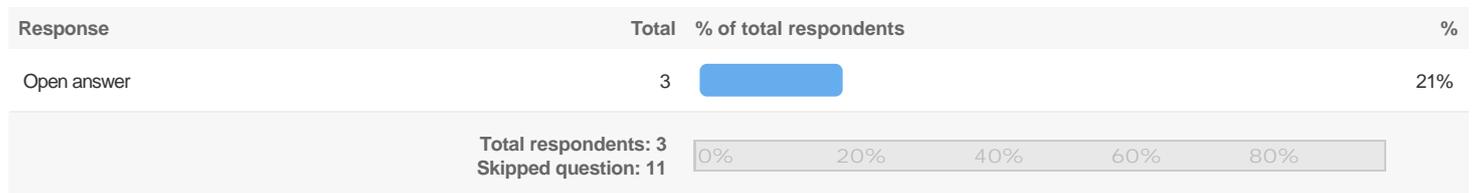
**45. With respect to staff resources, please rate the impact of these review actions on the following aspects:**



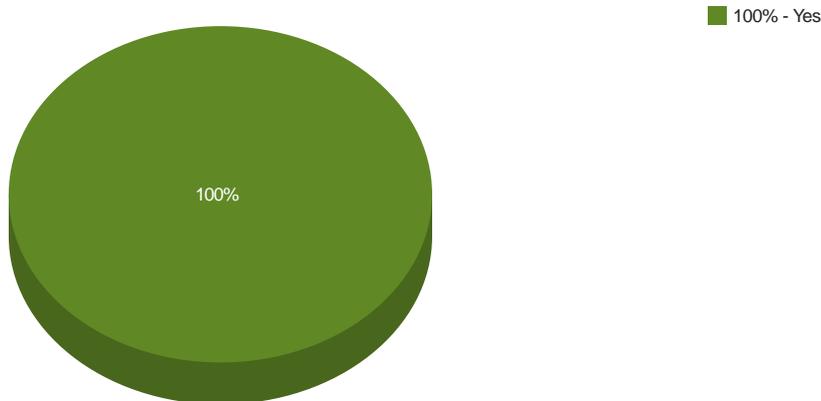
**46. Please indicate which of the specific actions affect you most positively/negatively:**



**47. Additional comments:**

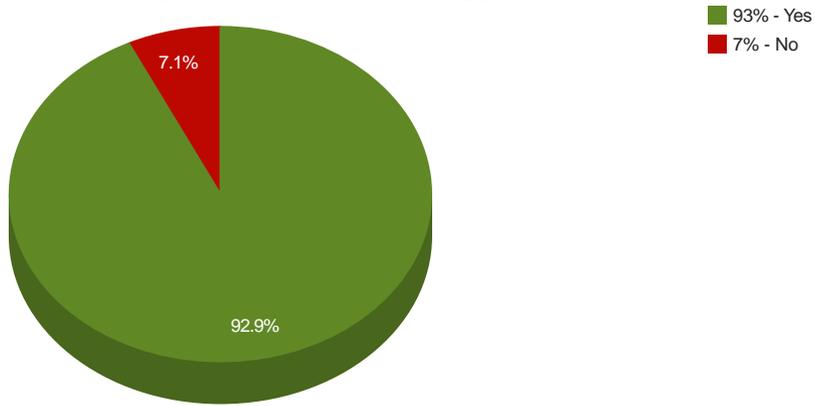


**48. Could you please indicate if we can use the name of your licensing authority for: Providing a list of respondents (without the answers) to the EC?**



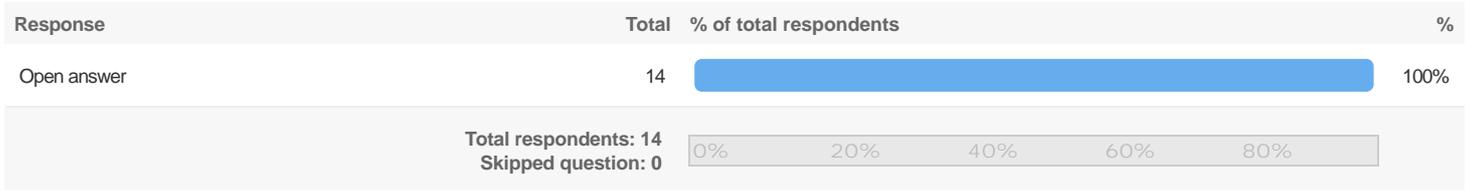
n=14

49. Could you please indicate if we can use your contact details for: Contacting you for further contribution to the study?



n=14

50. Please enter the name of your licensing authority:



51. Please enter the email address on which we may contact you for further contribution to the study:

