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# Flash Eurobarometer 426

Report

# SMEs, Resource Efficiency and Green Markets

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Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs
and co-ordinated by the Directorate-General for Communication

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## INTRODUCTION

Small and medium sized enterprises (SMEs) are the economic backbone of the European Union[1]. Numbering more than 20 million, these companies represent 99% of European businesses and account for more than two thirds of employment[2]. As well as being economically important, SMEs are also environmentally important: although their individual impact is small, their cumulative impact on the environment is significant.

Although environmental policy can create challenges for SMEs, it also provides business opportunities. By increasing resource efficiency, providing circular economy solutions and participating in green markets, European SMEs can generate employment and growth as well as boost their productivity and competitiveness.

The Green Action Plan for SMEs[3], adopted in July 2014, details how the Commission will work in partnership with Member States and regions to help SMEs take advantage of these opportunities[4].

This survey follows from past Eurobarometers (FL342 in 2012 and FL381 in 2013) in reviewing the current levels of resource efficiency actions and the state of the green market amongst Europe's SMEs, as well as in neighbouring countries and in the US.

Topics covered include:

- Current and planned resource efficiency actions, and the reasons for taking them
- Barriers when implementing resource efficiency actions
- Experiences bidding on public procurement tenders with environmental requirements
- The role and impact of policy in supporting green business initiatives
- The current state of the green market

The results will be analysed at the EU28 and national level, and they will also be compared according to a range of company characteristics. Where possible the trend since the last report in 2013 will be discussed. In some cases, national level or company characteristics analysis was not carried out when the base sizes were too small. These will be noted in the text.

It should also be noted that for some of the small Member States (Cyprus, Malta and Luxembourg) and most of the non-EU countries surveyed (Albania, Iceland, Former Yugoslav Republic of Macedonia, Montenegro, Moldova and Serbia) the sample size is relatively low and results should therefore be interpreted with caution as they carry a larger margin of error. This is particularly the case for Albania, Moldova and Montenegro where, due to the nature of the economic sector, fewer than 100 businesses were interviewed.

This survey was carried out by the TNS Political & Social network in 28 Member States of the European Union, Albania, the Former Yugoslav Republic of Macedonia, Montenegro, Serbia, Turkey, Iceland, Moldova, Norway and the US between the 1st and 18th of September 2015. Some 15,020 enterprises were interviewed via telephone (landline and mobile phone) on behalf of the European Commission, Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs.

[1] Small and medium-sized enterprises are defined as those with a staff headcount below 250. In addition to the staff headcount ceiling, an enterprise qualifies as an SME if it meets either the turnover ceiling or the balance sheet ceiling, but not necessarily both. The full definition can be found at:
http://ec.europa.eu/growth/smes/business-friendly-environment/sme-definition/index_en.htm
[2] http://ec.europa.eu/growth/smes/
[3] http://ec.europa.eu/growth/smes/business-friendly-environment/green-action-plan/index_en.htm
[4] http://ec.europa.eu/environment/sme/index_en.htm

The methodology used is that of Eurobarometer surveys as carried out by the Directorate-General for Communication ("Strategy, Corporate Communication Actions and Eurobarometer" Unit)[5]. A technical note on the manner in which interviews were conducted by the Institutes within the TNS Political & Social network is appended as an annex to this report. Also included are the interview methods and confidence intervals[6].

Note: In this report, countries are referred to by their official abbreviation. The abbreviations used in this report correspond to:

| | | | |
|---|---|---|---|
| Belgium | BE | Latvia | LV |
| Czech Republic | CZ | Luxembourg | LU |
| Bulgaria | BG | Hungary | HU |
| Denmark | DK | Malta | MT |
| Germany | DE | The Netherlands | NL |
| Estonia | EE | Austria | AT |
| Greece | EL | Poland | PL |
| Spain | ES | Portugal | PT |
| France | FR | Romania | RO |
| Croatia | HR | Slovenia | SI |
| Ireland | IE | Slovakia | SK |
| Italy | IT | Finland | FI |
| Republic of Cyprus* | CY | Sweden | SE |
| Lithuania | LT | United Kingdom | UK |
| Albania | AL | Former Yugoslav Republic of Macedonia** | MK |
| Montenegro | ME | Serbia | RS |
| Turkey | TR | | |
| Iceland | IS | Moldova | MD |
| Norway | NO | United States of America | US |

* Cyprus as a whole is one of the 28 European Union Member States. However, the 'acquis communautaire' has been suspended in the part of the country which is not controlled by the government of the Republic of Cyprus. For practical reasons, only the interviews carried out in the part of the country controlled by the government of the Republic of Cyprus are included in the 'CY' category and in the EU28 average.

** Provisional abbreviation which in no way prejudges the definitive name of this country, which will be agreed once the current negotiations at the United Nations have been completed.

*We wish to thank the people throughout Europe who have given their time to take part in this survey.*

*Without their active participation, this study would not have been possible.*

[5] http://ec.europa.eu/public_opinion/index_en.htm

[6] The results tables are included in the annex. It should be noted that the total of the percentages in the tables of this report may exceed 100% when the respondent has the possibility of giving several answers to the question.

## MAIN FINDINGS

**Almost all European SMEs (87%) are taking some action to be more resource efficient**

- Minimising waste (60%), saving energy (59%) and saving materials (54%) are the most common resource efficiency actions.
  - **The proportion of SMEs taking resource efficiency actions has declined since 2013**, particularly for recycling by reusing material or waste within the company (-11 percentage points) and saving energy (-8 pp).
  - 13% of SMEs say they are not taking any resource efficiency actions – a seven percentage point increase since 2013..
- **72% of SMEs are planning additional resource efficiency actions in the next two years**. The most common additional actions planned are energy saving (50%), minimising waste (47%) and saving materials (43%).
  - SMEs are also less likely to be planning additional resource efficiency actions than they were in 2013.
- Costs saving is the primary motivator for resource efficiency actions (68%), followed by the environment being one of the company's top priorities (39%).
- For 42% of SMEs, resource efficiency actions decreased production costs.
- The most common difficulties encountered when setting up resource efficiency actions are complex administrative or legal procedures (29%) and the cost of environmental actions (23%),.
  - 37% of SMEs that are currently taking resource efficiency actions encountered no difficulties.
- For 42% of SMEs, resource efficiency actions decreased production costs.
- Overall investment in resource efficiency actions are low – 24% of SMEs that are taking actions invested none of their turnover in this area in the past two years, while 24% invested less than 1% and 26% invested 1-5%.
  - However, 80% of the SMEs that have invested in resource efficiency are satisfied with the return on their investment.

**SMEs are much more likely to rely on internal rather than external support for resource efficiency efforts**

- Amongst SMEs that have taken resource efficiency actions, 63% rely on their own financial resources and 61% on their own or technical expertise. Comparatively few rely on external support (19%).
  - There has been an eight point increase in the proportion relying on their own technical expertise since 2013.
- Overall SMEs are much more likely to have used private sector funding than public sector funding (79% vs. 30%)
- The most common forms of external support are advice or other non-financial assistance from private consulting and audit companies (35%), private funding from a bank, investment company or venture capital fund (33%), or advice or other non-financial assistance from business associations (32%).

- Since 2013 the proportion of SMEs using private funding from a bank, investment company or venture capital fund has increased by 12 percentage points. Over the same period there has been a decline in the proportion using advice or other non-financial assistance from private consulting and audit companies (-8 pp),
- SMEs consider grants or subsidies (32%), consultancy on how to improve resource efficiency (21%) and advice on funding possibilities and financial planning for resource efficiency investments (19%) as the best types of assistance for improving resource efficiency.

**Just 11% of SMEs have bid on a public procurement tender including environmental requirements in the last two years**

- Overall 6% bid successfully, 3% unsuccessfully and for 2% the outcome is unknown. 86% have not made a bid.
  - Most SMEs that made a bid did not experience any difficulties (78%).
  - For those that did experience difficulties too much paperwork was the most mentioned difficulty (40%), followed by costs (28%). Costs are more likely to be mentioned as a difficulty than they were in 2013 (+9 percentage points).
  - Never being confronted with a public procurement tender including environmental requirements is by far the main reason SMEs have not made a bid (51%), followed by not trying because they assumed it was too complicated (19%)

**Across the EU, at least one third of all SMEs either currently offer green products or services (26%), or are planning to do so in the next two years (7%)**

- The majority of European SMEs do not currently offer green products or services, and have no plans to do so (60%).
- For those that do sell them, green products and services make up a small proportion of turnover: for 63% they represent 30% or less – and for 39% green products or services represent no more than 5% of their annual turnover.
- Most SMEs that sell green products or services have been doing so for more than three years (69%) while 20% have been selling them for 1-3 years and 8% for less an one year
- For the large majority (91%), their national market is the main market for their green products or services.
  - Almost one in five (17%) say their main market is the EU plus Iceland, Lichtenstein, Norway and Switzerland.

**SMEs are much more likely to rely on their own resources, rather than external support, to produce green products or services**

- 59% of SMEs that offer green products or services rely on their own financial resources to produce these green products or services (59%), while almost as many (57%) rely on their own technical expertise. More than one in five says they rely on external support (23%).
  - External support is most likely to be in the form of advice or other non-financial assistance from business associations (27%) or from private consulting and audit companies (23%).
- 66% of SMEs that receive public support for green products or services are satisfied with this support.

**Financial incentives and assistance identifying potential markets or customers are seen as most helpful in expanding green product or service offerings, though in clear decline since 2013**

- SMEs consider financial incentives for developing products, services or new production processes (35%), assistance with identifying potential markets or customers (32%) and technical support and consultancy for the development of products, services and production processes (28%), the kinds of support that would help them in expanding the green products or services they are offering

**Financial incentives are also considered the best support for launching green products or services, amongst SMEs that do not currently offer them**

- Amongst SMEs that do not currently offer green products or services, 25% say financial incentives for developing products, services or new production processes would be the kinds of support that would most help them in launching green products or services.

**35% of SMEs have at least one full time employee in a green job[7]**

- On average SMEs have 5.3 employees in green jobs

**SMEs vs. Large companies (250+ employees)**

- There is little overall difference between SMEs and large companies in the likelihood to take at least a few resource efficiency actions, although there are variations for individual actions: indeed, SMEs are less likely than large companies to mention, for instance, saving energy as one of the resource efficiency actions they are currently taking (59% vs. 76%). The same pattern applies considering the planned actions over the next two years.
- SMEs are, however, more likely than large companies to have experienced a range of difficulties setting up their resource efficiency actions, in particular complex administration or legal procedures (29% vs. 17%) and a lack of specific environmental expertise (20% vs. 8%).
- SMEs are less likely to have invested a proportion of turnover in resource efficiency actions: 26% have invested nothing compared to 5% of large companies.
- SMEs are less likely to have bid on a public procurement tender (11% vs. 19%), and are also less likely to have bid successfully compared to large companies (6% vs. 17%).
- SMEs are less likely than large companies to offer green products or services (22% vs. 26%), and are more likely to say they have no plans to do so (60% vs. 54%).
- The average number of green jobs in European SMEs is 5.3, compared to 50.6 for large companies.

**SMEs in Europe and the US**

- SMEs in the US more likely than those in the EU to be taking at least a few resource efficiency actions (87% vs. 95%), and they are also more likely than their EU counterparts to be planning to implement additional resource efficiency actions (81% vs. 72%).

[7] A "green job" was defined in this survey as a job that directly deals with information, technologies, or materials that preserves or restores environmental quality. This requires specialised skills, knowledge, training, or experience (e.g. verifying compliance with environmental legislation, monitoring resource efficiency within the company, promoting and selling green products and services).

- There is little difference between EU and US SMEs in the proportion who encounter difficulties when establishing resource efficiency actions (5 percentage points), although SMEs in the US are more likely to report a lack of demand for resource efficient products or services (29% vs. 20%).
- SMEs in the US are also more likely than those in the EU to say resource efficiency actions increased production costs (41% vs. 21%).
- They are also more likely to have invested at least 1% of their annual turnover in resource efficiency actions (50% vs. 43%), but they are less likely than EU SMEs to be satisfied with the return on their investment (74% vs. 80%).
- There are no notable differences in the proportion of SMEs in the EU and the US that have bid on in general (11% vs. 9%) or bid successfully on public procurement tenders (6% vs. 7%).
- Amongst non-bidders, SMEs in the US are more likely to mention most reasons for not bidding, particularly due to the fact that there was too much paperwork (38% vs. 16%) or that the costs were too high (23% vs. 10%).
- Although SMEs in the US are only slightly more likely than their EU counterparts to be selling green products or services (30% vs. 26%), those that do so are more likely to report a higher turnover from green products or services sales: 69% of US SMEs say these represented at least 6% of annual turnover, compared to 48% of EU SMEs that say the same.
- US SMEs have also been selling green products or services for longer: 81% have been doing so for more than three years, compared to 69% of those in the EU.
- SMEs in the US are much more likely than those in the EU to rely on external support to produce green products or services (41% vs. 23%), and are more likely to rely on private funding (70% vs. 56%), and less likely to rely on public funding (12% vs. 23%) than those in the EU.

# I. BETTER USE OF RESOURCES: WHO, HOW AND HOW MUCH

This first section of the report discusses a wide range of factors relating to resource efficiency amongst SMEs.

Firstly, the actions that SMEs are currently taking to be more resource efficient will be considered, followed by the proposed additional actions that will be implemented over the next two years. The reasons SMEs take resource efficiency actions and the barriers they encounter when trying to establish resource efficiency actions will also be discussed.

The second chapter of this section will cover the impact resource efficiency actions have had on production costs, the financial investment in resource efficiency, and the satisfaction of businesses with the return on investment in resource efficiency.

Following this, the kinds of support SMEs rely on when trying to be more resource efficient, and the type of support they consider would be most effective in helping their company be more resource efficient will be considered.

Finally, there will be a discussion of SMEs experiences applying for public procurement tenders that incorporate environmental requirements, including reasons why SMEs do not apply for such tenders.

## 1 Actions to promote resource efficiency: present and future

### a. What is being done now?

Companies were asked about the current actions they are taking to be more resource efficient[8].

**– Despite the large decrease in both measures since 2013, minimising waste and saving energy are still the most common resource efficiency actions–**

Looking first at SMEs, at least half say they are minimising waste (60%), saving energy (59%) and saving materials (54%). At least four in ten SMEs are saving water (44%), or recycling by reusing material or waste within their company (40%).

One quarter of SMEs are selling their scrap material to another company (25%), while 22% are designing products that are easier to maintain, repair or reuse. Just over one in ten says they are using predominantly renewable energy (11%).

More than one in ten SMEs are not taking any actions to be more resource efficient (13%), which also implies that almost all SMEs (87%) are taking at least one action to be more resource efficient.

As the chart illustrates, SMEs are less likely to be taking actions in any of these areas than they were in 2013. The largest decline has been in the proportion of SMEs recycling by reusing material or waste within the company (-11 percentage points), followed by declines in saving energy (-8 pp), minimising waste and saving water (both -7 pp).

There has also been a seven percentage point increase in the proportion of SMEs that say they are not taking any actions to be more resource efficient.

[8] Q1 What actions is your company undertaking to be more resource efficient? Saving water; Saving energy; Using predominantly renewable energy (e.g. including own production through solar panels, etc.); Saving materials; Minimising waste; Selling your scrap material to another company; Recycling, by reusing material or waste within the company; Designing products that are easier to maintain, repair or reuse (N); Other (DO NOT READ OUT); None (DO NOT READ OUT); DK/NA

**Q1** What actions is your company undertaking to be more resource efficient? (MULTIPLE ANSWERS POSSIBLE)
**(% - EU28)**

*Base: All SMEs (12,913)*

## Company breakdown

Comparing SMEs to large companies (with 250+ employees) shows that large companies are much more likely to say they are selling their scrap material to another company (45% vs. 25%), saving energy (76% vs. 59%), saving water (57% vs. 44%) or designing products that are easier to maintain, repair or reuse (35% vs. 22%)[9]. In general, large companies are at least five percentage points more likely than SMEs to be undertaking each resource efficiency action.

**Q1** What actions is your company undertaking to be more resource efficient? (MULTIPLE ANSWERS POSSIBLE)

| | Saving water | Saving energy | Using predominantly renewable energy (e.g. including own production through solar panels, etc.) | Saving materials | Minimising waste | Selling your scrap material to another company | Recycling, by reusing material or waste within the company | Designing products that are easier to maintain, repair or reuse |
|---|---|---|---|---|---|---|---|---|
| **SMEs** | | | | | | | | |
| EU28 | 44 | 59 | 11 | 54 | 60 | 25 | 40 | 22 |
| **Large companies** | | | | | | | | |
| EU28 | 57 | 76 | 19 | 63 | 65 | 45 | 49 | 35 |

*Base: All companies (13,114)*

An analysis of company characteristics shows that the larger the SME, the more likely it is to be saving energy or selling its scrap material to another company. For instance, 58% of micro SMEs (1-9 employees) say they are saving energy, compared to 76% of medium-sized SMEs. Medium-sized SMEs are also significantly more likely to say they are saving materials (69% vs. 53%-55%) or minimising waste (68% vs. 59%-62.

[9] Care should be taken when interpreting the results for large companies, due to low base size (146).

Focussing just on micro SMEs, those with 2-9 employees are more likely than solo operators to be minimising waste (62% vs. 49%), saving energy (66% vs. 48%), saving materials (55% vs. 47%), or saving water (61% vs. 35%).

Comparing by sector highlights manufacturing SMEs as the most likely to be undertaking almost all of these actions. For example, 69% of manufacturing SMEs are minimising waste, compared to 62% of those in industry, 57% in retail and 50% in the services sector. Manufacturing SMEs are also the most likely to be saving energy (64% vs. 50%-59%), saving materials (63% vs. 49%-58%), or selling their scrap material to another country (35% vs. 12%-29%). Manufacturing SMEs are also the most likely to be designing products that are easier to maintain, repair or reuse (29%), followed by those in industry (25%), retail and services (both 17%).

Compared to SMEs in other sectors, those in services are the least likely to say they are saving water (39% vs. 43%-47%) or recycling (33% vs. 40%-43%). Industry sector SMEs are the most likely to say they are using predominantly renewable energy (17% vs. 7%-13%).

**Q1** What actions is your company undertaking to be more resource efficient? (MULTIPLE ANSWERS POSSIBLE)
**(% - EU)**

| | Saving water | Saving energy | Using predominantly renewable energy (e.g. including own production through solar panels, etc.) | Saving materials | Minimising waste | Selling your scrap material to another company | Recycling, by reusing material or waste within the company | Designing products that are easier to maintain, repair or reuse |
|---|---|---|---|---|---|---|---|---|
| EU28 | 44 | 59 | 11 | 54 | 60 | 25 | 40 | 22 |
| **Company size** | | | | | | | | |
| 1-9 | 44 | 58 | 10 | 53 | 59 | 22 | 39 | 21 |
| 10-49 | 44 | 63 | 13 | 55 | 62 | 35 | 44 | 26 |
| 50-249 | 45 | 76 | 17 | 69 | 68 | 45 | 48 | 24 |
| **Sectors grouped (NACE)** | | | | | | | | |
| Manufacturing (C) | 47 | 64 | 13 | 63 | 69 | 35 | 43 | 29 |
| Retail (G) | 43 | 59 | 7 | 49 | 57 | 21 | 40 | 17 |
| Services (I/J/K/H/L/M) | 39 | 58 | 11 | 49 | 50 | 12 | 33 | 17 |
| Industry (B/D/E/F) | 45 | 50 | 17 | 58 | 62 | 29 | 41 | 25 |
| **One person company** | | | | | | | | |
| Yes | 35 | 48 | 8 | 47 | 49 | 16 | 33 | 15 |
| No | 61 | 66 | 15 | 55 | 62 | 17 | 35 | 16 |

*Base: All SMEs (12,913)*

Turning to other company characteristics, the larger an SME's turnover in 2014, the more likely it is to be selling scrap material to another company: 39% with the largest turnover do this, compared to 18% of those with a turnover of 100,000 euros or less. SMEs with a turnover for more than 10 million euros are also the most likely to be saving energy (69% vs. 58%-61%). Companies with a turnover of up to 500,000 euros are the least likely to be minimising waste (57%-58% vs. 64%-68%).

SMEs established in 2015 are more likely than older companies to be taking actions to save energy (77% vs 59%-60%), save materials (77% vs 53%-54%), save water (70% vs 43%-48%), to be recycling (61% vs 39%-45%) or to be selling their scrap to another company (36% vs 22%-25%)[10].

[10] Results for SMEs established in 2015 should be interpreted with caution as they are based on only 106 SMEs.

**Q1** What actions is your company undertaking to be more resource efficient? (MULTIPLE ANSWERS POSSIBLE)
**(% – EU)**

| | Saving water | Saving energy | Using predominantly renewable energy (e.g. including own production through solar panels, etc.) | Saving materials | Minimising waste | Selling your scrap material to another company | Recycling, by reusing material or waste within the company | Designing products that are easier to maintain, repair or reuse |
|---|---|---|---|---|---|---|---|---|
| EU28 | 44 | 59 | 11 | 54 | 60 | 25 | 40 | 22 |
| **Company age** | | | | | | | | |
| Before 2008 | 43 | 59 | 11 | 54 | 60 | 25 | 39 | 21 |
| Between 2009 and 2014 | 48 | 60 | 9 | 53 | 64 | 22 | 45 | 23 |
| 2015 and after | 70 | 77 | 13 | 77 | 59 | 36 | 61 | 20 |
| **Turnover 2014** | | | | | | | | |
| 100,000 euros or less | 45 | 58 | 8 | 56 | 57 | 18 | 37 | 18 |
| More than 100-500,000 euros | 44 | 59 | 12 | 53 | 58 | 26 | 40 | 21 |
| More than 500,000 - 2 mil. euros | 45 | 59 | 12 | 57 | 68 | 29 | 40 | 27 |
| More than 2- 10 mil. euros | 38 | 61 | 17 | 48 | 66 | 37 | 40 | 27 |
| More than 10 mil. euros | 48 | 69 | 20 | 55 | 64 | 39 | 43 | 20 |

*Base: All SMEs (12,913)*

## Comparison between the EU and US

When comparing the EU28 results with the results in the US, SMEs in the US are more likely to be taking almost all of these resource efficiency actions. For example, SMEs in the US are much more likely to say they are recycling by reusing material or waste within the company (64% vs. 40%), minimising waste (79% vs. 60%), selling their scrap material to another company (43% vs. 25%) or designing products that are easier to maintain, repair or reuse (34% vs. 22%). SMEs in EU28 are more likely than those in the US to say they are using predominantly renewable energy (11% vs. 5%), but they are also more likely to say they are not taking any of these actions (13% vs. 5%).

## National analysis

The national analysis[11] shows a considerably degree of variation in the resource efficiency actions being taken by SMEs in different Member States. SMEs in the UK, Ireland and Portugal are the most likely to be taking at least one resource efficiency action, with just 3%, 4% and 5% respectively saying they are not taking any actions in this area. In contrast, 42% of SMEs in Estonia, 35% in Romania, and 25% in Lithuania and Greece are not taking any resource efficiency actions.

At least nine out of ten (91%) SMEs in the UK are **minimising waste**, as are at least seven out of ten in France (77%), Ireland, Malta (both 75%), and Belgium (73%). Minimising waste is also the most mentioned action by SMEs in each of these countries, as well as by those in in Sweden (68%), Croatia (66%), The Netherlands (63%) and Italy (59%). In contrast, 19% of SMEs in Estonia and 24% in Greece are taking action in this area.

SMEs in the US (79%) and Iceland (72%) are amongst the most likely of SMEs in all countries surveyed to say they are minimising waste.

[11] Albania (92), Montenegro (95) and Moldova (103) all have a low base size and results should therefore be considered with caution

**Q1** What actions is your company undertaking to be more resource efficient? (MULTIPLE ANSWERS POSSIBLE)
**(% – MINIMISING WASTE)**

*Base: All SMEs (12,913)*

At least seven out of ten SMEs in Portugal (74%), the UK (72%), Denmark (71%) and France (70%) are taking actions to **save energy**. In fact, in 22 Member States at least half of all SMEs say they are taking energy saving actions, and this is also the most mentioned type of action in 15 Member States. At the other end of the scale 30% of SMEs in Estonia and 37% in Romania and Italy are saving energy.

SMEs Macedonia (29%), Norway and Estonia (both 30%) are the most unlikely to be saving energy

**Q1** What actions is your company undertaking to be more resource efficient? (MULTIPLE ANSWERS POSSIBLE)
**(% – SAVING ENERGY)**

*Base: All SMEs (12,913)*

SMEs in Portugal (74%), Finland (71%) and France (66%) are the most likely to be **saving materials**, and overall at least half of all SMEs in 18 Member States are doing this. Saving materials is the most mentioned action by SMEs in Portugal, Finland, Poland (64%), Slovenia (45%) and Bulgaria (44%). Once again SMEs in Estonia are the least likely to be taking this action, followed by those in Romania (32%).

Of all the countries surveyed, SMEs in Turkey are the most likely to say they are saving materials (82%).

**Q1** What actions is your company undertaking to be more resource efficient? (MULTIPLE ANSWERS POSSIBLE)
**(% - SAVING MATERIALS)**

*Base: All SMEs (12,913)*

Across all Member States, SMEs in France (67%), Portugal (66%) and Slovakia (62%) are the most likely to say they are **saving water**. This is also the most mentioned action by SMEs in Slovakia (62%). In contrast, 15% of SMEs in Estonia and 21% in Cyprus are saving water.

SMEs in Macedonia are amongst the most likely to say they are saving water (61%), while those in Norway (13%) are the least likely across all countries to be saving water.

**Q1** What actions is your company undertaking to be more resource efficient? (MULTIPLE ANSWERS POSSIBLE)
**(% - SAVING WATER)**

*Base: All SMEs (12,913)*

At least six out of ten SMEs in the UK (74%), Ireland (68%), Portugal (63%) and Sweden (60%) are **recycling** by reusing material or waste within the company, compared to 12% of SMEs in Lithuania, 16% in Latvia and 18% in Estonia.

Across all counties surveyed, SMEs in the US are the third most likely to be recycling, by reusing material or waste within the company (64%).

**Q1** What actions is your company undertaking to be more resource efficient? (MULTIPLE ANSWERS POSSIBLE)
**(% - RECYCLING, BY REUSING MATERIAL OR WASTE WITHIN THE COMPANY)**

*Base: All SMEs (12,913)*

SMEs in Sweden (40%), Denmark (39%) and the UK (35%) are the most likely to be **selling their scrap material to another company**, while those in Estonia are least likely to be doing this (11%).

Turkey and the US (both 43%) have the largest proportion of SMEs selling their scrap material to another company across all countries surveyed. Those in Macedonia (10%) are the least likely to be doing this.

**Q1** What actions is your company undertaking to be more resource efficient? (MULTIPLE ANSWERS POSSIBLE)
**(% - SELLING YOUR SCRAP MATERIAL TO ANOTHER COMPANY)**

*Base: All SMEs (12,913)*

Portugal is the only Member State where at least half of all SMEs say they are **designing products that are easier to maintain, repair or reuse** (51%), followed by those in France (40%), Sweden and Belgium (both 32%). At the other end of the scale 9% of SMEs in Estonia and 10% in Italy are doing this.

Across all counties surveyed, Turkey (46%) and the US (34%) are amongst the top four countries in terms of the proportion of SMEs that are designing products that are easier to maintain, repair or reuse. Those in Macedonia (4%) are the least likely of all countries surveyed to be taking this action.

**Q1** What actions is your company undertaking to be more resource efficient? (MULTIPLE ANSWERS POSSIBLE)
**(% – DESIGNING PRODUCTS THAT ARE EASIER TO MAINTAIN, REPAIR OR REUSE)**

*Base: All SMEs (12,913)*

More than one quarter of SMEs in Sweden (30%), Austria and the Netherlands (both 26%) are **using predominantly renewable energy**, compared to just 3% of SMEs in Croatia, Bulgaria, Romania and Estonia.

Across all countries surveyed, SMEs in Iceland (29%) are the second most likely, after those in Sweden, to be using predominantly renewable energy.

**Q1** What actions is your company undertaking to be more resource efficient? (MULTIPLE ANSWERS POSSIBLE)
**(% – USING PREDOMINANTLY RENEWABLE ENERGY (E.G. INCLUDING OWN PRODUCTION THROUGH SOLAR PANELS, ETC.))**

*Base: All SMEs (12,913)*

**Evolution since 2013**

When looking to the evolution since 2013, in most countries SMEs have generally become less likely to be taking any of these actions. This is a reversal of the trend seen between 2011 and 2013.

In 17 Member States, SMEs are less likely to be **minimising waste** than they were in 2011, and this is particularly the case in Spain (-34 percentage points) Germany, Romania (both -26 pp), and Slovakia (-22 pp). However, SMEs in some countries have gone against this trend - most notably those in Denmark (+24 pp), France (+17 pp), Cyprus and Malta (both +15 pp).

Across the EU there has been an eight percentage point decrease in the proportion of SMEs that are **saving energy**. However, in some Member States the decline has been much larger: for example, in Romania (-35 pp), Spain (-27 pp) and Greece (-23 pp). Relatively few Member States have increased the proportion of SMEs saving energy, with the most notable increases amongst SMEs in Denmark (+12 pp), France and Sweden (both +8 pp).

Since 2013 there has been a large decline in the proportion of SMEs in Spain (-32 pp), Romania (-28 pp), Greece (-24 pp) and Slovakia (-21 pp) that are **saving materials**, and overall there has been a decline in this activity by SMEs in 18 Member States. However, SMEs in France (+25 pp), Slovenia (+18 pp), Denmark (+16 pp), and Cyprus (+13 pp) are now more likely to be saving materials than they were in 2013.

There has been a large decrease in the proportion of SMEs in Spain (-32 pp), Romania (-28 pp), Greece (-25 pp) and Germany (-21 pp) that are **saving water**, and once again there has been a decline in actions in this area across most Member States. The most notable exceptions are SMEs in Denmark (+19 pp), Sweden (+14 pp) and France (+13 pp).

The largest declines in the proportion of SMEs **recycling by reusing material or waste within the company** are observed in Spain (-28 pp), Slovakia (-22 pp) and Germany (-19 pp). The largest increases in recycling are observed amongst SMEs in Denmark (+17 pp), Malta (+15 pp) and Slovenia (+11 pp).

Changes since 2013 in the proportion of SMEs **selling their scrap**, or **using predominantly renewable energy** are generally smaller than for other actions. For example, SMEs in Germany (-18 pp) and Slovakia (-13 pp) recorded the largest declines in selling scrap, while the largest increases are observed amongst SMEs in Sweden (+13 pp) and Denmark (+11 pp). SMEs in Sweden are also more likely to be using predominantly renewable energy than they were in 2013 (+8 pp), while those in Ireland (-12 pp) and Germany (-10 pp) are now less likely to be doing so.

Expanding the analysis to include non-EU countries shows SMEs in Macedonia recorded the largest decrease since 2013 in the proportion saving energy (-44 pp).. SMEs in the US (-21 pp) and Norway (-13 pp) have the largest decrease in the proportions using mostly renewable energy.

**Q1** What actions is your company undertaking to be more resource efficient? (MULTIPLE ANSWERS POSSIBLE) **(%)**

| | Minimising waste | Sept. 2015 - Sept. 2013 | Saving energy | Sept. 2015 - Sept. 2013 | Saving materials | Sept. 2015 - Sept. 2013 | Saving water | Sept. 2015 - Sept. 2013 | Recycling, by reusing material or waste within the company | Sept. 2015 - Sept. 2013 | Selling your scrap material to another company | Sept. 2015 - Sept. 2013 | Designing products that are easier to maintain, repair or reuse* | Using predominantly renewable energy (e.g. including own production through solar panels, etc.) | Sept. 2015 - Sept. 2013 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| EU28 | 60 | ▼ 7 | 59 | ▼ 8 | 54 | ▼ 5 | 44 | ▼ 7 | 40 | ▼ 11 | 25 | ▼ 4 | 22 | 11 | ▼ 5 |
| BE | 73 | ▼ 6 | 64 | ▼ 4 | 58 | ▼ 4 | 47 | ▼ 12 | 39 | ▼ 4 | 30 | ▼ 2 | 32 | 22 | ▲ 1 |
| BG | 34 | ▲ 7 | 43 | ▲ 2 | 44 | ▲ 6 | 28 | ▼ 3 | 22 | ▲ 2 | 20 | ▼ 8 | 12 | 3 | ▼ 2 |
| CZ | 65 | ▼ 13 | 67 | ▼ 8 | 51 | ▼ 15 | 46 | ▼ 10 | 42 | ▼ 7 | 32 | ▼ 4 | 26 | 9 | ▼ 1 |
| DK | 63 | ▲ 24 | 71 | ▲ 12 | 61 | ▲ 16 | 52 | ▲ 19 | 39 | ▲ 17 | 39 | ▲ 11 | 29 | 8 | ▼ 4 |
| DE | 42 | ▼ 26 | 62 | ▼ 12 | 45 | ▼ 16 | 32 | ▼ 21 | 38 | ▼ 19 | 22 | ▼ 18 | 12 | 20 | ▼ 10 |
| EE | 19 | ▲ 1 | 30 | ▲ 3 | 24 | ▼ 10 | 15 | ▲ 2 | 18 | ▲ 4 | 11 | ▲ 4 | 9 | 3 | = |
| IE | 75 | ▼ 2 | 57 | ▼ 5 | 53 | ▲ 7 | 44 | ▲ 1 | 68 | ▼ 13 | 32 | ▲ 2 | 22 | 12 | ▼ 12 |
| EL | 24 | ▼ 17 | 46 | ▼ 23 | 44 | ▼ 24 | 29 | ▼ 25 | 35 | ▼ 10 | 29 | ▼ 6 | 19 | 7 | ▼ 4 |
| ES | 51 | ▼ 34 | 64 | ▼ 27 | 59 | ▼ 32 | 46 | ▼ 32 | 50 | ▼ 28 | 25 | ▼ 9 | 19 | 5 | ▼ 8 |
| FR | 77 | ▲ 17 | 70 | ▲ 8 | 66 | ▲ 25 | 67 | ▲ 13 | 36 | ▼ 5 | 23 | ▲ 1 | 40 | 8 | ▲ 1 |
| HR | 66 | ▲ 12 | 64 | = | 53 | ▲ 9 | 51 | ▲ 12 | 33 | ▼ 6 | 27 | ▼ 1 | 18 | 3 | ▼ 4 |
| IT | 59 | ▼ 6 | 37 | ▼ 7 | 38 | ▼ 2 | 25 | ▼ 7 | 25 | ▼ 15 | 17 | ▼ 1 | 10 | 10 | ▼ 7 |
| CY | 39 | ▲ 15 | 51 | ▲ 6 | 47 | ▲ 13 | 21 | ▼ 17 | 32 | ▼ 7 | 21 | ▲ 3 | 15 | 11 | ▲ 1 |
| LV | 38 | ▼ 11 | 61 | ▼ 12 | 58 | ▼ 3 | 41 | ▼ 10 | 16 | ▼ 7 | 17 | ▼ 5 | 19 | 6 | ▲ 1 |
| LT | 33 | ▼ 1 | 50 | ▼ 11 | 46 | ▼ 9 | 45 | ▼ 5 | 12 | ▼ 7 | 24 | ▼ 3 | 13 | 4 | ▼ 5 |
| LU | 65 | ▼ 5 | 50 | ▼ 19 | 53 | ▼ 8 | 43 | ▼ 6 | 38 | ▼ 14 | 32 | ▲ 8 | 14 | 11 | ▲ 2 |
| HU | 48 | ▲ 2 | 59 | ▼ 12 | 49 | ▼ 4 | 44 | ▼ 8 | 19 | ▼ 1 | 20 | ▼ 4 | 14 | 7 | = |
| MT | 75 | ▲ 15 | 64 | ▼ 12 | 60 | ▲ 10 | 47 | ▲ 5 | 59 | ▲ 15 | 28 | ▼ 2 | 31 | 16 | ▲ 1 |
| NL | 63 | ▼ 3 | 59 | ▼ 8 | 57 | ▼ 8 | 29 | ▲ 2 | 45 | ▼ 10 | 34 | ▲ 6 | 24 | 26 | ▼ 4 |
| AT | 61 | ▼ 14 | 67 | ▼ 13 | 57 | ▼ 6 | 39 | ▼ 17 | 47 | ▼ 13 | 30 | ▲ 6 | 31 | 26 | ▼ 8 |
| PL | 54 | ▲ 6 | 64 | = | 64 | ▲ 8 | 52 | ▲ 1 | 31 | ▲ 3 | 27 | ▼ 3 | 16 | 5 | ▼ 5 |
| PT | 62 | ▼ 11 | 74 | ▼ 16 | 74 | ▼ 11 | 66 | ▼ 11 | 63 | ▼ 15 | 30 | ▼ 3 | 51 | 7 | ▼ 2 |
| RO | 26 | ▼ 26 | 37 | ▼ 35 | 32 | ▼ 28 | 29 | ▼ 28 | 28 | ▼ 4 | 16 | ▼ 3 | 12 | 3 | ▼ 5 |
| SI | 40 | = | 44 | ▲ 4 | 45 | ▲ 18 | 29 | ▼ 3 | 30 | ▲ 11 | 20 | = | 19 | 13 | ▲ 3 |
| SK | 57 | ▼ 22 | 62 | ▼ 12 | 56 | ▼ 21 | 62 | ▼ 6 | 30 | ▼ 22 | 20 | ▼ 13 | 21 | 6 | ▼ 4 |
| FI | 64 | ▼ 16 | 63 | ▼ 7 | 71 | ▼ 9 | 36 | ▼ 2 | 35 | ▼ 6 | 25 | ▼ 9 | 30 | 15 | ▲ 1 |
| SE | 68 | ▲ 7 | 67 | ▲ 8 | 65 | ▲ 7 | 43 | ▲ 14 | 60 | ▲ 4 | 40 | ▲ 13 | 32 | 30 | ▲ 8 |
| UK | 91 | ▼ 3 | 72 | ▼ 7 | 64 | ▼ 7 | 57 | ▼ 6 | 74 | ▼ 9 | 35 | ▼ 7 | 26 | 10 | ▼ 8 |
| AL | 18 | ▼ 29 | 35 | ▼ 22 | 20 | ▼ 23 | 26 | ▼ 22 | 12 | ▼ 16 | 9 | ▲ 8 | 5 | 4 | ▲ 2 |
| MK | 24 | ▼ 27 | 29 | ▼ 44 | 25 | ▼ 28 | 19 | ▼ 22 | 17 | ▲ 2 | 10 | ▼ 2 | 4 | 2 | ▼ 3 |
| ME | 54 | ▲ 10 | 68 | ▲ 26 | 52 | ▲ 33 | 61 | ▲ 45 | 11 | = | 24 | ▲ 6 | 11 | 4 | = |
| RS | 33 | ▲ 5 | 53 | ▲ 6 | 41 | ▲ 11 | 34 | ▲ 6 | 21 | ▼ 2 | 27 | ▲ 6 | 10 | 11 | ▲ 5 |
| TR | 61 | ▲ 3 | 67 | ▼ 10 | 82 | ▲ 17 | 58 | ▼ 6 | 46 | ▲ 8 | 43 | ▲ 4 | 46 | 9 | ▲ 4 |
| IS | 72 | ▲ 6 | 49 | ▼ 13 | 65 | ▼ 8 | 26 | ▼ 7 | 53 | ▼ 3 | 38 | ▲ 2 | 23 | 29 | ▲ 6 |
| MD | 26 | NA** | 71 | NA** | 48 | NA** | 52 | NA** | 30 | NA** | 16 | NA** | 16 | 5 | NA** |
| NO | 51 | ▼ 20 | 30 | ▼ 34 | 34 | ▼ 26 | 13 | ▼ 4 | 39 | ▼ 21 | 20 | ▼ 7 | 14 | 21 | ▼ 13 |
| US | 79 | ▼ 9 | 66 | ▼ 9 | 58 | ▼ 21 | 51 | ▼ 11 | 64 | ▼ 19 | 43 | ▲ 2 | 34 | 5 | ▼ 21 |

*Base: All SMEs (12,913)*

**New item*
***Question not asked: this country was not included in the previous survey.*

## b. What will be done in two years' time?

As well as the actions they are taking now, companies were also asked about additional resource efficiency actions they were planning to implement in the next 2 years[12].

**- As was the case in 2013, saving energy and minimising water are the most commonly planned resource efficiency actions for the next two years, but have clearly declined since 2013 –**

Half of all SMEs plan to implement energy saving (50%), while 47% plan to minimise waste and 43% plan to save materials. At least one third say they are planning to implement actions to save water (38%) or to recycle by reusing material or waste within the company (34%).

SMEs are less likely to be planning to sell their scrap material to other companies (22%), design products that are easier to maintain, repair or reuse (21%), or to use predominantly renewable energy (16%).

One quarter (25%) of SMEs say they are not planning to implement resource efficiency actions in any of these areas.

SMEs are not only less likely to be taking resource efficiency actions than they were in 2013, as noted in the previous section, but they are also less likely now to be planning additional resource efficiency actions over the next two years.

Indeed, there has been an eight percentage point increase in the proportion of SMEs that say they are not planning any additional resource efficiency actions in the next two years

The largest decrease is in the proportion of SMEs that are planning additional actions to minimise waste (-9 percentage points), followed by saving energy (-8 pp), recycling (-7 pp) and saving materials (-6 pp).

**Q2** Over the next two years, what are the additional resource efficiency actions that your company is planning to implement ? (MULTIPLE ANSWERS POSSIBLE)
**(% - EU28)**

*Base: All SMEs (12,913)*

[12] Q2. Over the next two years, what are the additional resource efficiency actions that your company is planning to implement? Save water; Save energy ; Use predominantly renewable energy (e.g. including own production through solar panels, etc.); Save materials; Minimise waste; Sell your scrap material to another company; Recycle, by reusing material or waste within the company; Design products that are easier to maintain, repair or reuse (N); Other (DO NOT READ OUT); None (DO NOT READ OUT); DK/NA

## Company breakdown

As is the case for actions currently being taken, larger companies are generally more likely than SMEs to be planning to implement resource efficiency actions in these areas, although the differences between the two groups are smaller[13]. This is particularly the case when it comes to plans to sell scrap material to another company (34% vs. 22%), plans to save energy (59% vs. 50%), to design products that are easier to maintain, repair or reuse (29% vs. 21%), or to save water (45% vs. 38%). SMEs are, however, more likely than larger companies to say they do not plan to take additional actions in any of these areas in the next two years (25% vs. 20%).

Q2 Over the next two years, what are the additional resource efficiency actions that your company is planning to implement ? (MULTIPLE ANSWERS POSSIBLE)
**(% - EU)**

| | Save water | Save energy | Use predominantly renewable energy (e.g. including own production through solar panels, etc.) | Save materials | Minimise waste | Sell your scrap material to another company | Recycle, by reusing material or waste within the company | Design products that are easier to maintain, repair or reuse |
|---|---|---|---|---|---|---|---|---|
| SMEs | | | | | | | | |
| EU28 | 38 | 50 | 16 | 43 | 47 | 22 | 34 | 21 |
| Large companies | | | | | | | | |
| EU28 | 45 | 59 | 21 | 47 | 52 | 34 | 35 | 29 |

*Base: All companies (13,114)*

There are few notable differences between SMEs of different sizes in planned additional actions over the next two years.

The more resource efficiency actions an SME is currently taking, the more likely it is they are planning additional actions for the next two years.

For example, 77% of SMEs that are currently taking many actions plan to take additional energy saving actions, compared to 60% of SMEs currently taking some action, 31% of SMEs taking few actions and 9% of those currently taking no actions. The same pattern applies in all other areas.

Medium-sized SMEs are the most likely to be planning additional resource efficiency actions to minimise waste (53% vs. 47%-48%) or to save materials (52% vs. 42%-46%). At the same time, SMEs with at least 10 employees are more likely than micro SMEs to be planning to sell scrap material to another company (29%-32% vs. 20%).

Focusing on micro SMEs, those with 2-9 employees are more likely than one person operators to be planning actions in each of these areas - with the exception of selling scrap to other companies - for instance 64% of micro SMEs with 2-9 employees are planning to save energy in the next two years, compared to 41% of one person SMEs.

Manufacturing SMEs are the most likely to be planning to implement additional resource efficiency actions in the next two years to minimise waste (53% vs. 40%-48%), save energy (54% vs. 46%-51%), or save materials (50% vs. 39%-44%). Along with companies in the industry sector, manufacturing SMEs are more likely than those in retail and services to be planning to sell their scrap material or to design products that are easier to maintain, repair or reuse (24-27% vs 17%).

[13] Care should be taken when interpreting the results for large companies, due to low base size (146).

SMEs in the services sector are less likely than those in other sectors to be planning to recycle by reusing material or waste within the company (27% vs. 34%-38%).

**Q2** Over the next two years, what are the additional resource efficiency actions that your company is planning to implement ? (MULTIPLE ANSWERS POSSIBLE)

| | Save water | Save energy | Use predominantly renewable energy (e.g. including own production through solar panels, etc.) | Save materials | Minimise waste | Sell your scrap material to another company | Recycle, by reusing material or waste within the company | Design products that are easier to maintain, repair or reuse |
|---|---|---|---|---|---|---|---|---|
| EU28 | 38 | 50 | 16 | 43 | 47 | 22 | 34 | 21 |
| **Company size** | | | | | | | | |
| 1-9 | 38 | 49 | 16 | 42 | 47 | 20 | 33 | 20 |
| 10-49 | 39 | 55 | 18 | 46 | 48 | 29 | 38 | 25 |
| 50-249 | 38 | 54 | 19 | 52 | 53 | 32 | 37 | 24 |
| **Sectors grouped (NACE)** | | | | | | | | |
| Manufacturing (C) | 38 | 54 | 17 | 50 | 53 | 28 | 36 | 27 |
| Retail (G) | 39 | 51 | 14 | 41 | 45 | 19 | 34 | 17 |
| Services (I/J/K/H/L/M) | 34 | 48 | 14 | 39 | 40 | 10 | 27 | 17 |
| Industry (B/D/E/F) | 38 | 46 | 21 | 44 | 48 | 26 | 38 | 24 |
| **One person company** | | | | | | | | |
| Yes | 28 | 41 | 15 | 38 | 39 | 14 | 26 | 16 |
| No | 55 | 64 | 22 | 44 | 56 | 17 | 44 | 24 |

*Base: All SMEs (12,913)*

Companies established prior to 2015 are more likely to say they are planning actions to minimise waste (46%-53% vs 38%), while SMEs established in 2015 are more likely than older SMES to be planning additional actions to save energy (61% vs 50%-54%)[14].

The more resource efficiency actions an SME is currently taking, the more likely it is they are planning additional actions in the next two years. For example, 77% of SMEs that are currently taking many actions plan to take additional energy saving actions, compared to 60% of SMEs currently taking some action, 31% of SMEs taking few actions and 9% of those currently taking no actions. The same pattern applies in all other areas.

**Q2** Over the next two years, what are the additional resource efficiency actions that your company is planning to implement ? (MULTIPLE ANSWERS POSSIBLE)

| | Save water | Save energy | Use predominantly renewable energy (e.g. including own production through solar panels, etc.) | Save materials | Minimise waste | Sell your scrap material to another company | Recycle, by reusing material or waste within the company | Design products that are easier to maintain, repair or reuse |
|---|---|---|---|---|---|---|---|---|
| EU28 | 38 | 50 | 16 | 43 | 47 | 22 | 34 | 21 |
| **Company age** | | | | | | | | |
| Before 2008 | 37 | 50 | 16 | 43 | 46 | 22 | 34 | 20 |
| Between 2009 and 2014 | 41 | 54 | 18 | 47 | 53 | 22 | 39 | 24 |
| 2015 and after | 44 | 61 | 2 | 44 | 38 | 17 | 35 | 19 |
| **Actions undertaken** | | | | | | | | |
| Many actions | 67 | 77 | 30 | 72 | 74 | 43 | 62 | 43 |
| Some actions | 48 | 60 | 15 | 52 | 58 | 20 | 34 | 20 |
| Few actions | 12 | 31 | 9 | 20 | 26 | 9 | 18 | 7 |
| No action | 3 | 9 | 2 | 4 | 4 | 1 | 3 | 1 |

*Base: All SMEs (12,913)*

[14] Results for SMEs established in 2015 should be interpreted with caution as they are based on only 106 SMEs.

## Comparison between the EU and the US

SMEs in the US, as well as being more likely to be taking most of the resource efficiency actions now than those in EU28, they are also more likely to be planning additional resource efficiency actions over the next two years. This is particularly the case for recycling by reusing material or waste within the company (50% vs. 34%), minimising waste (63% vs. 47%), Selling their scrap to another company (35% vs. 22%) and designing products that are easier to maintain, repair or reuse (33% vs. 21%). SMEs in the EU, on the other hand, are slightly more likely to say they are not planning any actions.

## National analysis

In 23 Member States[15], SMEs are most likely to say they are planning additional actions to **save energy** in the next two years, including France (74%), Portugal (64%) and Spain (62%). Saving energy is also widely mentioned by SMEs in the UK (74%) and Belgium (64%). At the other end of the scale 12% of SMEs in Malta and 16% in Cyprus are planning additional energy saving actions. It is worth noting, however, that at least half of all SMEs in these two Member States are already taking action in this area.

SMEs in Turkey are the third most likely (71%), after the UK and France, to be planning additional actions to save energy, while those in Norway (17%) are the least likely, after Malta and Cyprus.

v

**Q2** Over the next two years, what are the additional resource efficiency actions that your company is planning to implement ? (MULTIPLE ANSWERS POSSIBLE)
**(% - SAVE ENERGY)**

*Base: All SMEs (12,913)*

SMEs in the UK (85%), Belgium (68%), Ireland (64%) and Italy (40%) are most likely to say they are planning additional actions to **minimise waste**, and this area are also widely mentioned by SMEs in France (70%). Once again SMEs in Cyprus (6%) and Malta (8%) are the least likely to be planning waste minimising actions. SMEs in Malta are, however, amongst the most likely to be currently taking action to minimise waste.

[15] Albania (92), Montenegro (95) and Moldova (103) all have a low base size and results should therefore be considered with caution

SMEs in Iceland (76%) and the US (63%) are in the top countries in terms of the proportions planning additional actions to minimise waste.

**Q2** Over the next two years, what are the additional resource efficiency actions that your company is planning to implement ? (MULTIPLE ANSWERS POSSIBLE)
**(% - MINIMISE WASTE)**

*Base: All SMEs (12,913)*

SMEs in the UK are the most likely to be planning actions to **save materials** (70%), followed by those in Portugal (59%), Spain (58%) and France (56%), particularly compared to SMEs in Malta (7%) and Cyprus (8%).

SMEs in Turkey and Iceland are also the most likely to say they are planning actions to save materials (73% and 70% respectively) – equal to the proportion observed amongst SMEs in the UK.

**Q2** Over the next two years, what are the additional resource efficiency actions that your company is planning to implement ? (MULTIPLE ANSWERS POSSIBLE)
**(% - SAVE MATERIALS)**

*Base: All SMEs (12,913)*

SMEs in France (63%), the UK (62%), Portugal and Slovakia (both 56%) are the most likely to be planning additional actions to **save water**, while those in Cyprus (5%) and Estonia (8%) are least likely to be doing so. This pattern is similar to that observed in the proportion of SMEs currently saving water.

Along with those in the UK, SMEs in Turkey are the second most likely to be planning additional actions to save water (62%). Those in Norway are the least likely to be planning these actions, along with those in Cyprus (both 5%).

**Q2** Over the next two years, what are the additional resource efficiency actions that your company is planning to implement ? (MULTIPLE ANSWERS POSSIBLE)
**(% - SAVE WATER)**

*Base: All SMEs (12,913)*

At least half of all SMEs in the UK (74%), Ireland (56%), Portugal (55%) and Spain (53%) are planning additional actions to **recycle by reusing material or waste within the company**. At least half of all SMEs in these countries are already taking action in this area. At the other end of the scale, SMEs in Cyprus (8%) and Estonia (10%) are the least likely to be planning additional actions to recycle.

**Q2** Over the next two years, what are the additional resource efficiency actions that your company is planning to implement ? (MULTIPLE ANSWERS POSSIBLE)
**(% - RECYCLE, BY REUSING MATERIAL OR WASTE WITHIN THE COMPANY)**

*Base: All SMEs (12,913)*

At least three in ten SMEs in the UK, Sweden (both 35%), Spain (31%) and Greece (30%) are planning additional actions to **sell their scrap to another company**. This compares to 4% of SMEs in Malta and 6% in Cyprus.

SMEs in Iceland (43%) and Turkey (42%) are the most likely across all countries studied to be planning additional actions to sell their scrap to another company.

**Q2** Over the next two years, what are the additional resource efficiency actions that your company is planning to implement ? (MULTIPLE ANSWERS POSSIBLE)
**(% - SELL YOUR SCRAP MATERIAL TO ANOTHER COMPANY)**

*Base: All SMEs (12,913)*

At least one third of SMEs in Portugal (45%), France (40%), Belgium (35%) and the UK (33%) are planning additional actions to **design products that are easier to maintain, repair or reuse**. Companies in Portugal and France are also the most likely to already be taking action in this area. Once again companies in Cyprus (3%), Malta and Estonia (both 7%) are least likely to be planning additional actions to design products that are easier to maintain, repair or reuse.

SMEs in Turkey (52%) are the most likely across all countries to be planning additional actions to design products that are easier to maintain, repair or reuse.

**Q2** Over the next two years, what are the additional resource efficiency actions that your company is planning to implement ? (MULTIPLE ANSWERS POSSIBLE)
**(% - DESIGN PRODUCTS THAT ARE EASIER TO MAINTAIN, REPAIR OR REUSE)**

*Base: All SMEs (12,913)*

At least three in ten SMEs in the Netherlands (34%), Belgium (32%) and Sweden (30%) are planning additional actions to **use predominantly renewable energy** in the next two years. This compares to 4% of companies in Estonia and Lithuania, and 6% in Denmark.

SMEs in Iceland (37%) are the most likely across all countries studied to be planning additional actions to use predominantly renewable energy.

**Q2** Over the next two years, what are the additional resource efficiency actions that your company is planning to implement ? (MULTIPLE ANSWERS POSSIBLE)
**(% - USE PREDOMINANTLY RENEWABLE ENERGY (E.G. INCLUDING OWN PRODUCTION THROUGH SOLAR PANELS, ETC.))**

*Base: All SMEs (12,913)*

It is also worth noting that SMEs in Estonia are consistently amongst the least likely to be currently taking action, or planning future actions in any of these areas.

## Evolution since 2013

SMEs in most Member States are generally less likely to be planning additional resource efficiency actions than they were in 2013.

SMEs in Malta (-54 percentage points), the Czech Republic, Germany (both -32 pp) and Romania (-31 pp) are much less likely to be planning additional actions to **save energy**, compared to 2013. However, the reverse is true for SMEs in France (+26 pp), Sweden (+15 pp) and Slovenia (+14 pp).

SMEs in Malta (-41 pp) and the Czech Republic (-38 pp) are also much less likely to be planning additional actions to **minimise waste**, compared to 2013. The same is true for SMEs in Spain (-35 pp). SMEs in France (+25 pp) and Ireland (+17 pp), on the other hand, are now more likely to be planning additional actions in this area.

In fact, SMEs in the Czech Republic, Malta and Spain consistently show the largest decreases in the proportion of SMEs planning to undertake additional actions in almost all of these areas. In the case of **saving materials**, there has been a 44 percentage point decrease in the proportion of SMEs in Malta planning additional actions in this area in the next two years, followed by a similar decline amongst those in the Czech Republic (-41 pp), and then Spain (-33 pp).

SMEs in Sweden and France, on the other hand, are consistently amongst those with the largest increases in the proportions planning to undertake most of these actions. In the case of saving materials, there has been an increase amongst SMEs in France (+22 pp), Croatia (+16 pp) and Sweden (+12 pp).

The largest decreases in the proportions of SMEs planning additional actions to **save water** are observed amongst SMEs in Romania (-37 pp), Spain (-33 pp), the Czech Republic and Malta (both -31 pp). The largest increases are observed amongst SMEs in France (+26 pp), Ireland (+15 pp), Poland (+13 pp) and Sweden (+12 pp).

When it comes to planned additional actions to **recycle by reusing material or waste within the company**, SMEs in Malta (-31 pp), Spain and the Czech Republic (both -28 pp) are now much less likely to say they are planning this, compared to 2013. Going against the general trend, there have been increases over the same period in some countries, most notably amongst SMEs in France (+15 pp), Ireland (12 pp) and Sweden (+10 pp).

SMEs in Malta (-25 pp), Germany (-22 pp) and the Czech Republic (-17 pp) are much less likely to be planning additional actions to **sell scrap material to another company**, compared to 2013. The reverse is true for SMEs in Sweden (+17 pp), France and Ireland (both +10 pp). SMEs in Malta (-18 pp), Germany (-16 pp) and Lithuania (-12 pp) are much less likely to be planning additional actions to **use predominantly renewable energy**, while those in France (+13 pp) and Sweden (+8 pp) are now more likely to be planning this than they were in 2013.

Looking more broadly at all countries in the survey shows that SMEs in Macedonia have the second largest decrease (after Malta) in the proportion planning additional energy saving actions (-36 pp). SMEs in Montenegro have the third largest increase since 2013 in the proportion planning additional actions to recycle, but they have the largest decrease in the proportion planning additional actions to use predominantly renewable energy (-20 pp)[16].

[16] Due to low base sizes, care should be taken when interpreting results for Albania (92), Montenegro (95) and Moldova (105).

**Q2** Over the next two years, what are the additional resource efficiency actions that your company is planning to implement ? (MULTIPLE ANSWERS POSSIBLE) **(%)**

| | Save energy | Sept. 2015 - Sept. 2013 | Minimise waste | Sept. 2015 - Sept. 2013 | Save materials | Sept. 2015 - Sept. 2013 | Save water | Sept. 2015 - Sept. 2013 | Recycle, by reusing material or waste within the company | Sept. 2015 - Sept. 2013 | Sell your scrap material to another company | Sept. 2015 - Sept. 2013 | Design products that are easier to maintain, repair or reuse* | Use predominantly renewable energy (e.g. including own production through solar panels, etc.) | Sept. 2015 - Sept. 2013 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| EU28 | 50 | ▼ 8 | 47 | ▼ 9 | 43 | ▼ 6 | 38 | ▼ 5 | 34 | ▼ 7 | 22 | ▼ 3 | 21 | 16 | ▼ 4 |
| BE | 64 | ▼ 4 | 68 | ▲ 3 | 54 | ▲ 4 | 48 | ▼ 1 | 37 | ▲ 3 | 29 | ▲ 3 | 35 | 32 | = |
| BG | 48 | = | 39 | ▲ 6 | 45 | ▲ 4 | 33 | ▲ 2 | 21 | ▲ 6 | 23 | ▼ 5 | 15 | 13 | ▲ 2 |
| CZ | 33 | ▼ 32 | 27 | ▼ 38 | 22 | ▼ 41 | 21 | ▼ 31 | 16 | ▼ 28 | 13 | ▼ 17 | 16 | 7 | ▼ 2 |
| DK | 37 | ▼ 1 | 29 | ▲ 9 | 31 | ▲ 5 | 27 | ▲ 10 | 16 | = | 15 | = | 15 | 6 | ▼ 6 |
| DE | 31 | ▼ 32 | 19 | ▼ 27 | 21 | ▼ 21 | 15 | ▼ 25 | 19 | ▼ 20 | 9 | ▼ 22 | 8 | 13 | ▼ 16 |
| EE | 20 | ▼ 6 | 11 | ▼ 4 | 16 | ▼ 5 | 8 | ▼ 2 | 10 | = | 9 | ▲ 5 | 7 | 4 | ▲ 2 |
| IE | 56 | ▲ 8 | 64 | ▲ 17 | 47 | ▲ 9 | 51 | ▲ 15 | 56 | ▲ 12 | 28 | ▲ 10 | 29 | 23 | ▼ 1 |
| EL | 45 | ▼ 16 | 21 | ▼ 14 | 33 | ▼ 19 | 25 | ▼ 21 | 37 | ▲ 3 | 30 | = | 25 | 19 | ▼ 5 |
| ES | 62 | ▼ 29 | 50 | ▼ 35 | 58 | ▼ 33 | 49 | ▼ 33 | 53 | ▼ 28 | 31 | ▼ 8 | 24 | 14 | ▼ 8 |
| FR | 74 | ▲ 26 | 70 | ▲ 25 | 56 | ▲ 22 | 63 | ▲ 26 | 46 | ▲ 15 | 29 | ▲ 10 | 40 | 20 | ▲ 13 |
| HR | 51 | ▲ 5 | 50 | ▲ 8 | 44 | ▲ 16 | 41 | ▲ 10 | 22 | ▼ 6 | 22 | = | 17 | 13 | ▼ 8 |
| IT | 30 | ▼ 11 | 40 | ▼ 14 | 29 | ▼ 4 | 18 | ▼ 6 | 20 | ▼ 7 | 11 | ▼ 2 | 8 | 11 | ▼ 7 |
| CY | 16 | ▼ 18 | 6 | ▼ 3 | 8 | ▼ 15 | 5 | ▼ 16 | 8 | ▼ 16 | 6 | ▼ 3 | 3 | 13 | ▼ 4 |
| LV | 56 | ▼ 21 | 39 | ▼ 13 | 53 | ▼ 12 | 41 | ▼ 20 | 13 | ▼ 5 | 18 | ▼ 15 | 19 | 15 | ▲ 1 |
| LT | 42 | ▼ 10 | 27 | ▼ 6 | 34 | ▼ 13 | 35 | ▼ 10 | 11 | ▼ 5 | 20 | ▼ 3 | 12 | 4 | ▼ 12 |
| LU | 39 | ▼ 7 | 31 | ▼ 5 | 23 | ▼ 14 | 27 | ▼ 8 | 17 | ▼ 13 | 12 | ▼ 5 | 14 | 14 | ▼ 7 |
| HU | 49 | ▲ 4 | 40 | ▲ 1 | 43 | ▲ 3 | 40 | ▲ 7 | 20 | ▲ 9 | 18 | ▲ 3 | 11 | 15 | ▼ 3 |
| MT | 12 | ▼ 54 | 8 | ▼ 41 | 7 | ▼ 44 | 10 | ▼ 31 | 12 | ▼ 31 | 4 | ▼ 25 | 7 | 22 | ▼ 18 |
| NL | 52 | ▼ 2 | 39 | ▼ 7 | 40 | ▲ 1 | 21 | ▼ 1 | 29 | ▼ 5 | 18 | ▼ 5 | 17 | 34 | ▼ 4 |
| AT | 27 | ▼ 16 | 22 | ▼ 10 | 19 | ▼ 8 | 14 | ▼ 6 | 18 | ▼ 3 | 12 | ▼ 3 | 15 | 21 | ▼ 11 |
| PL | 58 | ▲ 2 | 49 | ▼ 2 | 51 | ▲ 5 | 52 | ▲ 13 | 24 | ▼ 9 | 27 | ▼ 3 | 18 | 12 | ▼ 8 |
| PT | 64 | ▼ 8 | 53 | ▼ 7 | 59 | ▼ 9 | 56 | ▼ 9 | 55 | ▼ 5 | 28 | ▼ 6 | 45 | 23 | ▼ 8 |
| RO | 38 | ▼ 31 | 28 | ▼ 21 | 28 | ▼ 32 | 28 | ▼ 37 | 25 | ▼ 12 | 19 | ▼ 7 | 13 | 11 | ▼ 6 |
| SI | 40 | ▲ 14 | 28 | ▲ 8 | 29 | ▲ 9 | 26 | ▲ 6 | 22 | ▲ 8 | 15 | ▲ 2 | 12 | 15 | = |
| SK | 59 | ▼ 2 | 49 | ▼ 11 | 53 | ▼ 5 | 56 | ▲ 1 | 23 | ▼ 19 | 18 | ▼ 11 | 20 | 14 | ▼ 3 |
| FI | 45 | ▼ 11 | 43 | ▼ 16 | 40 | ▼ 21 | 29 | ▼ 2 | 28 | = | 24 | ▼ 6 | 20 | 17 | ▲ 1 |
| SE | 55 | ▲ 15 | 46 | ▲ 7 | 49 | ▲ 12 | 33 | ▲ 12 | 44 | ▲ 10 | 35 | ▲ 17 | 27 | 30 | ▲ 8 |
| UK | 74 | ▲ 2 | 85 | ▲ 6 | 70 | ▲ 3 | 62 | ▲ 7 | 74 | = | 35 | ▼ 3 | 33 | 23 | ▼ 2 |
| AL | 28 | ▼ 22 | 17 | ▼ 29 | 16 | ▼ 29 | 22 | ▼ 25 | 9 | ▼ 3 | 2 | ▲ 1 | 2 | 1 | ▼ 15 |
| MK | 40 | ▼ 36 | 22 | ▼ 38 | 26 | ▼ 28 | 23 | ▼ 28 | 13 | ▼ 10 | 8 | ▼ 7 | 4 | 7 | ▼ 6 |
| ME | 46 | ▲ 9 | 34 | ▲ 4 | 30 | ▼ 2 | 37 | ▼ 1 | 25 | ▲ 10 | 14 | ▲ 3 | 17 | 5 | ▼ 20 |
| RS | 26 | ▼ 17 | 21 | ▼ 3 | 18 | ▼ 17 | 19 | ▼ 7 | 22 | ▼ 6 | 13 | ▼ 11 | 8 | 14 | ▲ 2 |
| TR | 71 | ▼ 1 | 67 | = | 73 | ▲ 1 | 62 | ▲ 1 | 53 | ▼ 1 | 42 | ▼ 4 | 52 | 25 | ▲ 3 |
| IS | 56 | = | 76 | ▲ 2 | 70 | ▼ 4 | 35 | ▼ 7 | 58 | ▲ 6 | 43 | ▼ 1 | 29 | 37 | = |
| MD | 38 | NA** | 22 | NA** | 23 | NA** | 31 | NA** | 18 | NA** | 10 | NA** | 12 | 10 | NA** |
| NO | 17 | ▼ 11 | 18 | ▼ 9 | 14 | ▼ 1 | 5 | ▲ 1 | 16 | ▼ 5 | 9 | ▼ 1 | 8 | 8 | ▼ 1 |
| US | 58 | ▼ 9 | 63 | ▼ 15 | 52 | ▼ 20 | 44 | ▼ 20 | 50 | ▼ 23 | 35 | ▼ 9 | 33 | 19 | ▼ 12 |

*Base: All SMEs (12,913)*

**New item*

***Question not asked: this country was not included in the previous survey.*

## c. Why SMEs are taking resource efficiency actions

Companies currently taking resource efficiency actions were asked their main reasons for doing so[17].

**- Cost saving is by far the most common reason for taking resource efficiency actions –**

Almost seven out of ten SMEs that are taking resource efficiency actions do so for costs saving reasons (68%). The next most mentioned reason for taking resource efficiency measures, is that the environment is one of the company's top priorities (39%), while 24% say that resource efficiency actions are a result of demand from customers or providers.

Almost one in five is taking resource efficiency actions to create a competitive advantage or business opportunity (18%), or due to financial and fiscal incentives or other forms of public support (17%). Just over one in ten SMEs are taking actions in anticipation of future legislative changes (12%), or to catch up with their main competitors, who have already taken action (11%).

The anticipation of future changes to the standards of products or processes is a reason mentioned by almost one in ten (9%) of the SMEs.

Since 2013 there has been an eleven percentage point increase in the proportion of SMEs that say they are taking resource efficiency actions because the environment is a top company priority, and there has also been a five point increase in the proportion taking action to save costs.

**Q3** What are the main reasons why your company is taking actions to be more resource efficient? (MAX. 3 ANSWERS)
**(% - EU28)**

*Base: SMEs that have taken at least one resource efficiency action = 11,113*

[17] Q3. What are the main reasons why your company is taking actions to be more resource efficient? Financial and fiscal incentives or other forms of public support; Anticipation of future changes in legislation; Anticipation of future changes to the standards of products or processes (M); Demand from customers or providers; Creation of a competitive advantage or business opportunity; Catching up with main competitors who have already taken action; Cost savings; The environment is one of your company's top priorities (M); Other (DO NOT READ OUT); None (DO NOT READ OUT) ; DK/NA

## Company breakdown

There are relatively few notable differences between SMEs and large companies. Large companies are more likely than SMEs to say they are taking action to create a competitive advantage or business opportunity (32% vs. 18%), for cost savings (79% vs. 68%)[18].

Q3 What are the main reasons why your company is taking actions to be more resource efficient? (MAX. 3 ANSWERS POSSIBLE)
(% - EU)

| | Financial and fiscal incentives or other forms of public support | Anticipation of future changes in legislation | Anticipation of future changes to the standards of products or processes | Demand from customers or providers | Creation of a competitive advantage or business opportunity | Catching up with main competitors who have already taken action | Cost savings | The environment is one of your company's top priorities |
|---|---|---|---|---|---|---|---|---|
| SMEs | | | | | | | | |
| EU28 | 17 | 12 | 8 | 23 | 16 | 11 | 67 | 39 |
| Large companies | | | | | | | | |
| EU28 | 20 | 11 | 12 | 22 | 32 | 17 | 79 | 41 |

*Base: Companies that have taken at least one resource efficiency action = 11,248*

The analysis of company size illustrates that the larger the SME, the more likely it is to be taking resource efficiency actions to create a competitive advantage or business opportunity: 16% of micro SMEs say this, compared to 22% of small-sized SMEs and 27% of medium-sized SMEs. In addition, medium-sized SMEs are more likely than those with less than 50 employees to say they are taking action in anticipation of future changes in legislation (20% vs. 12%), due to demand from customers or providers (35% vs. 23%-26%), or due to financial and fiscal incentives or other forms of public support (23% vs. 17%-18%).

Amongst micro SMEs, those with 2-9 employees are more likely than solo operators to say the environment is one of the company's top priorities (53% vs. 43%).

Cost savings and environmental concerns are the main reasons for taking resource efficiency actions in all company sectors. However, SMEs in the industry sector are the most likely to be taking action due to demand from customers or providers (32%), and SMEs in the services sector the least likely (19%). Industry sector SMEs are also the most likely to be taking action due to financial and fiscal incentives or other forms of public support (20%), particularly when compared to manufacturing or services SMEs (both 15%).

[18] Care should be taken when interpreting the results for large companies, due to low base size (128).

**Q3** What are the main reasons why your company is taking actions to be more resource efficient? (MAX. 3 ANSWERS POSSIBLE)
**(% - EU)**

| | Financial and fiscal incentives or other forms of public support | Anticipation of future changes in legislation | Anticipation of future changes to the standards of products or processes | Demand from customers or providers | Creation of a competitive advantage or business opportunity | Catching up with main competitors who have already taken action | Cost savings | The environment is one of your company's top priorities |
|---|---|---|---|---|---|---|---|---|
| EU28 | 17 | 12 | 9 | 24 | 18 | 11 | 68 | 39 |
| **Company size** | | | | | | | | |
| 1-9 | 17 | 12 | 8 | 23 | 16 | 11 | 67 | 39 |
| 10-49 | 18 | 12 | 11 | 26 | 22 | 14 | 70 | 38 |
| 50-249 | 23 | 20 | 10 | 35 | 27 | 14 | 69 | 39 |
| **Sectors grouped (NACE)** | | | | | | | | |
| Manufacturing (C) | 15 | 12 | 9 | 26 | 19 | 11 | 67 | 38 |
| Retail (G) | 18 | 12 | 8 | 22 | 18 | 12 | 67 | 39 |
| Services (I/J/K/H/L/M) | 15 | 12 | 7 | 19 | 19 | 8 | 69 | 40 |
| Industry (B/D/E/F) | 20 | 12 | 12 | 32 | 15 | 11 | 68 | 40 |
| **One person company** | | | | | | | | |
| Yes | 17 | 7 | 9 | 22 | 13 | 9 | 63 | 43 |
| No | 16 | 1 | 15 | 26 | 8 | 15 | 68 | 53 |

*Base: SMEs that have taken at least one resource efficiency action = 11,113*

Looking more broadly at company characteristics, the higher an SME's turnover, the more likely they are to be taking action due to financial and fiscal incentives or other form of public support: 15% of SMEs with the lowest turnover are taking action for this reason, compared to 31% of those with the highest turnover.

SMEs with a turnover of more than 10 million euros are the most likely to be taking action as a result of financial and fiscal incentives or other public support (31% vs. 15%-20%) or cost savings (75% vs. 62%-70%).

However, SMEs with higher turnover are the least likely to be taking resource efficiency actions because the environment is one of their top priorities (29% vs. 35%-39%).

SMEs whose turnover has increased in the past two years are more likely to be taking action to create a competitive advantage or business opportunity, compared to those whose turnover has remained the same or decreased (23% vs. 15%-17%). SMEs whose turnover has decreased are less likely to say that they are taking action because the environment is a top company priority, compared to SMEs whose turnover has increased or remained the same (34% vs 41%).

**Q3** What are the main reasons why your company is taking actions to be more resource efficient? (MAX. 3 ANSWERS POSSIBLE)
**(% - EU)**

| | Financial and fiscal incentives or other forms of public support | Anticipation of future changes in legislation | Anticipation of future changes to the standards of products or processes | Demand from customers or providers | Creation of a competitive advantage or business opportunity | Catching up with main competitors who have already taken action | Cost savings | The environment is one of your company's top priorities |
|---|---|---|---|---|---|---|---|---|
| EU28 | 17 | 12 | 9 | 24 | 18 | 11 | 68 | 39 |
| **Turnover 2014** | | | | | | | | |
| 100,000 euros or less | 15 | 8 | 7 | 25 | 16 | 12 | 62 | 39 |
| More than 100-500,000 euros | 18 | 15 | 9 | 25 | 18 | 13 | 67 | 39 |
| More than 500,000 - 2 mil. euros | 17 | 14 | 11 | 24 | 22 | 10 | 69 | 39 |
| More than 2- 10 mil. euros | 20 | 14 | 7 | 32 | 25 | 16 | 70 | 35 |
| More than 10 mil. euros | 31 | 16 | 14 | 26 | 29 | 8 | 75 | 29 |
| **Company's turnover (past 2 years)** | | | | | | | | |
| Increased | 18 | 14 | 11 | 26 | 23 | 11 | 68 | 41 |
| Decreased | 16 | 11 | 6 | 23 | 15 | 13 | 67 | 34 |
| Remained unchanged | 17 | 11 | 9 | 25 | 17 | 10 | 68 | 41 |

*Base: SMEs that have taken at least one resource efficiency action = 11,113*

## Comparison between the EU and the US

SMEs in the US are more likely than those in EU28 to be taking resource efficiency actions in anticipation of future changes to the standards of products or processes (17% vs. 9%). or due to financial and fiscal incentives or other forms of public support (23% vs. 17%). SMEs in EU28, on the other hand, are more likely than their US counterparts to be taking action to save costs (68% vs. 59%).

## National analysis

Across the EU[19], SMEs in each Member State are most likely to say they are taking resource efficiency actions for **cost savings**. The largest proportion is observed amongst SMEs in Estonia (82%), followed by Denmark (80%), Malta (79%), Lithuania and the UK (both 75%). Poland is the only country where fewer than half of the SMEs taking action say they are doing so for cost saving (46%), followed by 57% of SMEs in Luxembourg.

SMEs in Norway are the least likely to mention this(48%), after SMEs in Poland.

**Q3** What are the main reasons why your company is taking actions to be more resource efficient? (MAX. 3 ANSWERS)
**(% - COST SAVINGS)**

*Base: SMEs that have taken at least one resource efficiency action = 11,113*

At least half of the SMEs taking resource efficiency actions in Croatia (67%), Malta (58%), Portugal (57%) and Slovenia (51%) are doing so because **the environment is one of the company's top priorities**. In contrast just 16% of this group of SMEs in Hungary say the same.

SMEs in Macedonia are the second most likely, after those in Croatia, to be taking resource efficiency actions because the environment is one of the company's top priorities (60%).

[19] Due to low base sizes, care should be taken when interpreting results for Albania (55), Macedonia (110), Montenegro (86) and Moldova (88).

**Q3** What are the main reasons why your company is taking actions to be more resource efficient? (MAX. 3 ANSWERS)
**(% – THE ENVIRONMENT IS ONE OF YOUR COMPANY'S TOP PRIORITIES)**

*Base: SMEs that have taken at least one resource efficiency action = 11,113*

Across the EU, SMEs in France (43%), Finland (36%), Poland and Spain (both 34%) are the most likely to say their resource efficiency actions are driven by **demand from customers or providers**, while those in Malta (7%), Cyprus and Italy (both 8%) are the least likely to say this.

Along with those in France, SMEs in Turkey are the most likely to be taking action as a result of demand from customers or providers (both 43%).

**Q3** What are the main reasons why your company is taking actions to be more resource efficient? (MAX. 3 ANSWERS)
**(% – DEMAND FROM CUSTOMERS OR PROVIDERS)**

*Base: SMEs that have taken at least one resource efficiency action = 11,113*

Amongst SMEs taking resource efficiency actions, more than one third of those in Sweden, Denmark (both 35%) and Finland (34%) are doing so to **create a competitive advantage or business opportunity**. This compares to 9% in Italy and Slovakia.

SMEs in Turkey are the fourth most likely to be taking actions in order to create a competitive advantage or business opportunity, along with SMEs in Lithuania (both 29%).

**Q3** What are the main reasons why your company is taking actions to be more resource efficient? (MAX. 3 ANSWERS)
**(% - CREATION OF A COMPETITIVE ADVANTAGE OR BUSINESS OPPORTUNITY)**

*Base: SMEs that have taken at least one resource efficiency action = 11,113*

SMEs in Belgium (36%), the Netherlands (32%) and Cyprus (28%) are the most likely to be taking action due to **financial and fiscal incentives or other public support**, while those in Estonia (5%) and Croatia (7%) are least likely to give this reason.

SMEs in Macedonia (28%) and Turkey (26%) are amongst the most likely across all countries to be taking action due to financial and fiscal incentives or other public support.

**Q3** What are the main reasons why your company is taking actions to be more resource efficient? (MAX. 3 ANSWERS)
**(% - FINANCIAL AND FISCAL INCENTIVES OR OTHER FORMS OF PUBLIC SUPPORT)**

*Base: SMEs that have taken at least one resource efficiency action = 11,113*

At least one in five SMEs that take resource efficiency actions in Belgium, the UK and Malta (26%, 24% and 23%, respectively), do so in **anticipation of future changes in legislation**. In contrast, just 2% of this type of SMEs say the same in Italy.

SMEs in Turkey are also amongst the most likely to be taking action in anticipation of future changes in legislation (20%).

**Q3** What are the main reasons why your company is taking actions to be more resource efficient? (MAX. 3 ANSWERS)
**(% - ANTICIPATION OF FUTURE CHANGES IN LEGISLATION)**

*Base: SMEs that have taken at least one resource efficiency action = 11,113*

SMEs in Poland (26%), Spain (24%) and Portugal (20%) are much more likely than the EU average to be taking resource efficiency actions to **catch up with a main competitor that has already taken action**. Just 3% of SMEs in Italy and Austria say the same.

Along with SMEs in Spain, those in Macedonia (24%) are the second most likely to be taking action to catch up with a main competitor that has already taken action.

**Q3** What are the main reasons why your company is taking actions to be more resource efficient? (MAX. 3 ANSWERS)
**(% - CATCHING UP WITH MAIN COMPETITORS WHO HAVE ALREADY TAKEN ACTION)**

*Base: SMEs that have taken at least one resource efficiency action = 11,113*

SMEs in Malta are the most likely to be taking resource efficiency actions in **anticipation of future changes to the standards of products or processes** (17%), while no SMEs in Italy mention this as reason for taking resource efficiency actions (0%).

SMEs in Turkey are the most likely of those in all countries studied to be taking action in anticipation of future changes to the standards of products or processes (19%).

**Q3** What are the main reasons why your company is taking actions to be more resource efficient? (MAX. 3 ANSWERS)
**(% - ANTICIPATION OF FUTURE CHANGES TO THE STANDARDS OF PRODUCTS OR PROCESSES)**

*Base: SMEs that have taken at least one resource efficiency action = 11,113*

## Evolution since 2013

The results of the trend analysis across EU28 show that, SMEs are slightly more likely to mention **cost savings** as a reason for action (+5 percentage points), but in Lithuania (+25 pp) and Luxembourg (+22 pp) the increase has been much larger. At the other end of the scale, SMEs in Greece (-10 pp), Finland (-9 pp) and the Netherlands (-8 pp) are all less likely to give this as a reason than they were in 2013.

The largest increases in the proportion of SMEs taking action because the **environment is a top company priority** are observed amongst SMEs in Italy (+25 pp), Portugal (+21 pp) and Ireland (+19 pp). The largest decreases are observed amongst those in Cyprus (-20 pp).

SMEs in France (+22 pp) and Denmark (+14 pp) are more likely to mention **demand from customers or providers** than they were in 2013, while those in Germany (-13 pp), Italy (-11 pp), Luxembourg and Hungary (both -6 pp) are less likely to do so.

**Creation of a competitive advantage or business opportunity** is much more likely to be mentioned now than in 2013 by SMEs in Denmark (+22 pp), Romania (+18 pp) and Slovenia (+15 pp), but is less likely to be mentioned by SMEs in Italy and Malta (both -16 pp).

SMEs in Belgium (+12 pp) and Ireland (+11 pp) are more likely to be taking action in 2015 due to **financial and fiscal incentives or public support** than they were in 2013. The reverse is true for SMEs in Italy (-14 pp) and Slovenia (-12 pp).

The largest increase in the proportion of SMEs taking action in **anticipation of legislative changes** is observed amongst SMEs in Belgium (+12 pp) and Malta (+9 pp) while the largest decrease is observed amongst those in Romania (-10 pp).

SMEs in Poland (+10 pp) and Belgium (+9 pp) are more likely to mention **catching up with competitors who have already taken action** as a reason, while those in Italy (-9 pp) are less likely to do so than they were in 2013.

There has been an eleven percentage point increase in the proportion of SMEs in Sweden taking action in **anticipation of future changes to standards of products or processes**, while in Croatia and Italy the proportion of SMEs giving this reason for action has declined (both -10 pp).

Looking at both EU and non-EU countries the largest increase in the proportion of SMEs taking resource efficiency actions as a result of financial and fiscal incentives or public support is observed amongst those in Macedonia (+13 pp), while the largest increase in the proportion mentioning catching up with competitors who have already taken action is observed amongst SMEs in Turkey (+13 pp).

**Q3** What are the main reasons why your company is taking actions to be more resource efficient? (MAX. 3 ANSWERS) **(%)**

| | Cost savings | Sept 2015 - Sept. 2013 | The environment is one of your company's top priorities | Sept 2015 - Sept. 2013 | Demand from customers or providers | Sept 2015 - Sept. 2013 | Creation of a competitive advantage or business opportunity | Sept 2015 - Sept. 2013 | Financial and fiscal incentives or other forms of public support | Sept 2015 - Sept. 2013 | Anticipation of future changes in legislation | Sept 2015 - Sept. 2013 | Catching up with main competitors who have already taken action | Sept 2015 - Sept. 2013 | Anticipation of future changes to the standards of products or processes | Sept 2015 - Sept. 2013 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| EU28 | 68 | ▲ 5 | 39 | ▲ 11 | 24 | ▲ 1 | 18 | = | 17 | ▼ 2 | 12 | ▲ 2 | 11 | ▲ 2 | 9 | ▼ 1 |
| BE | 65 | ▲ 3 | 41 | ▲ 10 | 25 | ▼ 1 | 22 | ▲ 1 | 36 | ▲ 12 | 26 | ▲ 12 | 19 | ▲ 9 | 13 | ▲ 2 |
| BG | 66 | ▲ 16 | 35 | ▲ 11 | 12 | ▲ 5 | 19 | ▲ 13 | 14 | ▲ 3 | 16 | ▲ 4 | 13 | ▲ 7 | 10 | ▼ 1 |
| CZ | 71 | ▼ 1 | 45 | ▲ 13 | 26 | ▼ 1 | 18 | ▼ 4 | 13 | ▲ 3 | 16 | ▲ 2 | 7 | ▲ 1 | 7 | ▼ 6 |
| DK | 80 | ▲ 16 | 35 | ▲ 15 | 25 | ▲ 14 | 35 | ▲ 22 | 10 | ▼ 2 | 8 | ▲ 2 | 4 | = | 11 | ▲ 4 |
| DE | 71 | ▲ 1 | 32 | = | 18 | ▼ 13 | 17 | ▼ 1 | 23 | ▲ 3 | 13 | ▲ 2 | 5 | ▲ 2 | 5 | ▼ 1 |
| EE | 82 | ▼ 1 | 24 | ▲ 12 | 16 | ▲ 1 | 22 | ▲ 1 | 5 | ▼ 8 | 4 | ▲ 1 | 10 | ▲ 2 | 8 | ▲ 6 |
| IE | 61 | ▼ 6 | 41 | ▲ 19 | 12 | ▼ 3 | 12 | ▼ 10 | 23 | ▲ 11 | 19 | ▼ 5 | 11 | ▲ 6 | 15 | ▲ 6 |
| EL | 67 | ▼ 10 | 42 | ▲ 12 | 17 | ▲ 5 | 26 | ▲ 10 | 24 | ▼ 8 | 6 | ▼ 3 | 10 | ▲ 2 | 13 | ▲ 5 |
| ES | 66 | ▼ 4 | 35 | ▲ 6 | 34 | ▲ 10 | 16 | ▼ 3 | 9 | ▼ 11 | 11 | ▲ 3 | 24 | ▲ 7 | 10 | ▼ 3 |
| FR | 66 | ▲ 8 | 36 | ▲ 12 | 43 | ▲ 22 | 20 | ▲ 13 | 23 | ▲ 7 | 17 | ▲ 5 | 9 | ▲ 4 | 16 | ▲ 2 |
| HR | 71 | = | 67 | ▲ 6 | 12 | ▲ 1 | 12 | ▲ 2 | 7 | ▲ 2 | 16 | ▲ 1 | 6 | ▲ 1 | 7 | ▼ 10 |
| IT | 72 | ▲ 16 | 42 | ▲ 25 | 8 | ▼ 11 | 9 | ▼ 16 | 11 | ▼ 14 | 2 | ▼ 4 | 3 | ▼ 9 | 0 | ▼ 10 |
| CY | 68 | ▲ 16 | 28 | ▼ 20 | 8 | ▲ 2 | 17 | ▲ 6 | 28 | ▲ 7 | 9 | ▲ 5 | 6 | ▲ 1 | 8 | ▲ 3 |
| LV | 67 | ▲ 8 | 26 | = | 21 | = | 20 | ▲ 7 | 10 | ▼ 9 | 13 | ▲ 3 | 12 | ▲ 6 | 8 | ▼ 1 |
| LT | 75 | ▲ 25 | 30 | ▲ 11 | 13 | ▲ 2 | 29 | ▲ 11 | 25 | ▼ 10 | 3 | ▼ 4 | 8 | ▼ 4 | 5 | = |
| LU | 57 | ▲ 22 | 45 | ▲ 6 | 21 | ▼ 6 | 17 | ▼ 2 | 13 | ▲ 4 | 10 | ▲ 2 | 9 | ▼ 6 | 4 | ▼ 3 |
| HU | 71 | ▲ 7 | 16 | ▲ 3 | 20 | ▼ 6 | 20 | ▼ 5 | 12 | ▼ 2 | 8 | ▲ 2 | 19 | = | 10 | ▲ 7 |
| MT | 79 | ▲ 7 | 58 | ▲ 14 | 7 | ▼ 1 | 14 | ▼ 16 | 20 | ▲ 4 | 23 | ▲ 9 | 16 | ▲ 2 | 17 | ▼ 1 |
| NL | 67 | ▼ 8 | 43 | ▲ 15 | 22 | ▲ 5 | 21 | ▲ 4 | 32 | ▼ 7 | 9 | ▼ 5 | 10 | ▲ 4 | 12 | ▲ 3 |
| AT | 65 | ▼ 3 | 44 | ▼ 3 | 23 | ▼ 4 | 23 | ▲ 14 | 22 | ▼ 4 | 8 | ▼ 1 | 3 | ▼ 1 | 8 | = |
| PL | 46 | ▼ 5 | 41 | ▲ 11 | 34 | ▲ 9 | 22 | ▲ 1 | 12 | ▲ 1 | 6 | ▲ 1 | 26 | ▲ 10 | 9 | ▼ 5 |
| PT | 72 | = | 57 | ▲ 21 | 25 | ▲ 7 | 26 | ▲ 7 | 18 | ▲ 3 | 12 | ▼ 3 | 20 | ▲ 5 | 8 | ▼ 2 |
| RO | 69 | ▲ 4 | 30 | ▲ 5 | 19 | ▲ 6 | 28 | ▲ 18 | 13 | ▲ 1 | 9 | ▼ 10 | 10 | ▲ 3 | 13 | ▲ 3 |
| SI | 63 | ▲ 8 | 51 | ▲ 3 | 15 | = | 25 | ▲ 15 | 9 | ▼ 12 | 9 | ▲ 1 | 9 | ▲ 4 | 8 | ▲ 1 |
| SK | 62 | ▲ 2 | 42 | ▲ 2 | 18 | ▼ 4 | 9 | ▼ 1 | 8 | ▼ 1 | 12 | = | 7 | ▼ 2 | 6 | ▼ 1 |
| FI | 66 | ▼ 9 | 29 | ▲ 15 | 36 | ▼ 2 | 34 | ▲ 3 | 20 | ▼ 1 | 14 | = | 7 | ▲ 4 | 16 | ▲ 4 |
| SE | 62 | ▲ 5 | 36 | ▲ 5 | 26 | ▼ 4 | 35 | ▲ 5 | 16 | ▲ 5 | 14 | ▲ 4 | 9 | ▲ 5 | 16 | ▲ 11 |
| UK | 75 | ▲ 14 | 44 | ▲ 8 | 20 | ▼ 3 | 12 | = | 26 | ▲ 8 | 24 | ▲ 7 | 7 | ▲ 3 | 11 | ▲ 4 |
| AL | 65 | ▲ 28 | 52 | ▲ 33 | 8 | ▼ 22 | 14 | ▼ 2 | 4 | ▼ 15 | 0 | ▼ 25 | 14 | = | 0 | ▼ 16 |
| MK | 55 | ▼ 5 | 60 | ▲ 14 | 10 | ▼ 14 | 9 | ▼ 21 | 28 | ▲ 13 | 11 | ▲ 3 | 24 | ▲ 7 | 10 | ▲ 1 |
| ME | 68 | ▲ 50 | 51 | ▲ 39 | 13 | ▼ 9 | 13 | ▼ 28 | 10 | ▼ 19 | 8 | ▲ 6 | 8 | ▼ 10 | 11 | ▼ 13 |
| RS | 69 | ▲ 22 | 34 | ▲ 15 | 12 | ▲ 8 | 7 | ▼ 11 | 21 | ▲ 9 | 10 | ▲ 1 | 8 | ▼ 3 | 9 | ▲ 5 |
| TR | 52 | ▲ 3 | 22 | ▲ 3 | 43 | ▲ 2 | 29 | ▲ 3 | 26 | ▲ 3 | 20 | ▲ 4 | 18 | ▲ 13 | 19 | = |
| IS | 64 | ▲ 7 | 42 | ▲ 15 | 16 | ▲ 5 | 14 | ▲ 2 | 9 | ▼ 4 | 11 | ▲ 6 | 9 | ▼ 4 | 8 | ▲ 2 |
| MD | 78 | NA* | 27 | NA* | 26 | NA* | 19 | NA* | 18 | NA* | 17 | NA* | 8 | NA* | 9 | NA* |
| NO | 48 | ▼ 7 | 28 | ▼ 4 | 19 | ▼ 1 | 18 | ▲ 1 | 17 | ▲ 3 | 6 | ▲ 1 | 7 | ▲ 2 | 10 | ▼ 1 |
| US | 59 | = | 41 | ▲ 1 | 21 | ▲ 4 | 18 | ▼ 10 | 23 | ▼ 6 | 11 | ▼ 3 | 10 | ▲ 2 | 17 | ▲ 3 |

*Base: SMEs that have taken at least one resource efficiency action = 11,113*
**Question not asked: this country was not included in the previous survey.*

## d. Barriers encountered when becoming more resource efficient

Companies that have taken at least one resource efficiency action were asked about difficulties they encountered when trying to set up their actions[20].

**– More than one third of SMEs did not encounter any difficulty when setting up resource efficiency actions –**

SMEs are most likely to say that they did not encounter any difficulties when setting up resource efficiency actions (37%).

However, 29% of SMEs say they encountered complex administrative or legal procedures when setting up their resource efficiency action or actions and at least one in five say that the cost of environmental actions (23%), the difficulty to adapt environmental legislation to the company (21%), the lack of demand for resource efficient products or services, or the lack of specific environmental expertise (both 20%) were difficulties. Almost one in five SMEs found difficulty in choosing the right actions for their company (18%), while 15% had difficulties with the technical requirements of the legislation not being up to date. Just over one in ten (11%) said the lack of supply of required materials, parts, products or services was a difficulty.

**Q12** Did your company encounter any of the following difficulties when trying to set up resource efficiency actions? (MULTIPLE ANSWERS POSSIBLE)
**(% - EU28)**

*Base: SMEs that have taken at least one resource efficiency action = 11,113*

### Company breakdown

SMEs are generally more likely than large companies to say each of these issues was a difficulty for them when setting up resource efficiency actions[21]. This is particularly the case for complex administrative or legal procedures (29% vs. 17%) or a lack of specific environmental expertise (20% vs. 8%). The exception is the cost of environmental actions, which SMEs are less likely to mention compared to their larger company counterparts (23% vs. 33%).

[20] Q12. Did your company encounter any of the following difficulties when trying to set up resource efficiency actions? Complexity of administrative or legal procedures; Difficulty to adapt environmental legislation to your company (M); Technical requirements of the legislation not being up to date; Difficulty in choosing the right resource efficiency actions for your company; Cost of environmental actions; Lack of specific environmental expertise; Lack of supply of required materials, parts, products or services (N); Lack of demand for resource efficient products or services (N); Other (DO NOT READ OUT)
None (DO NOT READ OUT); DK/NA

[21] Care should be taken when interpreting the results for large companies, due to low base size (128).

**Q12** Did your company encounter any of the following difficulties when trying to set up resource efficiency actions? (MULTIPLE ANSWERS POSSIBLE)
**(% - EU)**

| | Complexity of administrative or legal procedures | Difficulty to adapt environmental legislation to your company | Technical requirements of the legislation not being up to date | Difficulty in choosing the right resource efficiency actions for your company | Cost of environmental actions | Lack of specific environmental expertise | Lack of supply of required materials, parts, products or services | Lack of demand for resource efficient products or services |
|---|---|---|---|---|---|---|---|---|
| **SMEs** | | | | | | | | |
| EU28 | 29 | 21 | 15 | 18 | 23 | 20 | 11 | 20 |
| **Large companies** | | | | | | | | |
| EU28 | 17 | 22 | 15 | 10 | 33 | 8 | 4 | 12 |

*Base: Companies that have taken at least one resource efficiency action = 11,248*

There are few notable differences in the difficulties faced by SMEs of different sizes. Small SMEs are the most likely to say they had difficulties with the complexity of legal or administrative procedures (34%), compared to micro (28%) and medium-sized SMEs (26%). Medium-sized SMEs are the least likely to say they experiences no difficulties (28% vs. 35%-37%).

Amongst micro SMEs, those with 2-9 employees are more likely than solo operators to say they experienced each kind of difficulty. For example, 45% of micro SMEs with 2-9 employees had difficulties with the cost of environmental actions, compared to 20% of one person SMEs.

One person SMEs are much more likely than those with 2-9 employees to say they experienced no difficulties (42% vs 25%).

Industry sector SMEs are the most likely to have experienced difficulties with the cost of environmental actions (30% vs. 19%-24%), the complexity of legal or administrative procedures (37% vs. 24%-31%), or with the technical requirements of the legislation not being up to date (23% vs. 12%-14%). SMEs in the retail and services sectors are the most likely to say they experienced no difficulties (both 40%).

**Q12** Did your company encounter any of the following difficulties when trying to set up resource efficiency actions? (MULTIPLE ANSWERS POSSIBLE)

| | Complexity of administrative or legal procedures | Difficulty to adapt environmental legislation to your company | Technical requirements of the legislation not being up to date | Difficulty in choosing the right resource efficiency actions for your company | Cost of environmental actions | Lack of specific environmental expertise | Lack of supply of required materials, parts, products or services | Lack of demand for resource efficient products or services |
|---|---|---|---|---|---|---|---|---|
| EU28 | 29 | 21 | 15 | 18 | 23 | 20 | 11 | 20 |
| **Company size** | | | | | | | | |
| 1-9 | 28 | 22 | 15 | 18 | 22 | 19 | 12 | 20 |
| 10-49 | 34 | 21 | 12 | 19 | 26 | 21 | 11 | 18 |
| 50-249 | 26 | 17 | 12 | 18 | 25 | 19 | 10 | 16 |
| **Sectors grouped (NACE)** | | | | | | | | |
| Manufacturing (C) | 31 | 22 | 14 | 18 | 24 | 19 | 13 | 19 |
| Retail (G) | 26 | 20 | 12 | 19 | 20 | 19 | 11 | 19 |
| Services (I/J/K/H/L/M) | 24 | 18 | 13 | 15 | 19 | 18 | 8 | 17 |
| Industry (B/D/E/F) | 37 | 24 | 23 | 20 | 30 | 23 | 13 | 23 |
| **One person company** | | | | | | | | |
| Yes | 20 | 17 | 10 | 12 | 20 | 16 | 12 | 19 |
| No | 45 | 33 | 21 | 31 | 45 | 32 | 25 | 33 |

*Base: SMEs that have taken at least one resource efficiency action = 11,113*

SMEs with the lowest or the highest turnover in 2014 are the least likely to report difficulties choosing the right efficiency actions (17% vs. 22%-23%). SMEs with the largest turnover are, however, the most likely to say that there was a lack of demand for resource efficient products or services (28% vs. 17%-24%).

SMEs whose turnover has decreased in the past two years are the most likely to say they had difficulties with the complexity of administrative or legal procedures (35% vs. 26%-30%), and are the least likely to say they experienced no problems (30% vs. 37%).

The more actions an SME has taken to be more resource efficient, the more likely they are to report experiencing each of these difficulties. For example, 19% of SMEs that have taken few actions mentioned the complexity of administrative or legal procedures, compared to 39% of SMEs that have taken some action and 39% that have taken many actions.

Consistently, the more actions an SME has taken, the less likely it is to say it experienced no difficulty: 30% that have taken many actions say this, compared to 44% that have taken few actions.

**Q12** Did your company encounter any of the following difficulties when trying to set up resource efficiency actions? (MULTIPLE ANSWERS POSSIBLE)

| | Complexity of administrative or legal procedures | Difficulty to adapt environmental legislation to your company | Technical requirements of the legislation not being up to date | Difficulty in choosing the right resource efficiency actions for your company | Cost of environmental actions | Lack of specific environmental expertise | Lack of supply of required materials, parts, products or services | Lack of demand for resource efficient products or services |
|---|---|---|---|---|---|---|---|---|
| EU28 | 29 | 21 | 15 | 18 | 23 | 20 | 11 | 20 |
| **Turnover 2014** | | | | | | | | |
| 100,000 euros or less | 27 | 18 | 13 | 17 | 23 | 20 | 12 | 19 |
| More than 100-500,000 euros | 32 | 25 | 19 | 22 | 25 | 22 | 13 | 23 |
| More than 500,000 - 2 mil. euros | 35 | 25 | 17 | 23 | 27 | 21 | 14 | 24 |
| More than 2- 10 mil. euros | 31 | 23 | 16 | 23 | 29 | 21 | 11 | 17 |
| More than 10 mil. euros | 32 | 19 | 10 | 17 | 24 | 21 | 8 | 28 |
| **Company's turnover (past 2 years)** | | | | | | | | |
| Increased | 30 | 22 | 15 | 19 | 24 | 20 | 12 | 20 |
| Decreased | 35 | 24 | 16 | 22 | 26 | 22 | 13 | 20 |
| Remained unchanged | 26 | 20 | 14 | 17 | 22 | 18 | 11 | 20 |
| **Actions undertaken** | | | | | | | | |
| Many actions | 39 | 28 | 20 | 28 | 34 | 26 | 16 | 24 |
| Some actions | 27 | 21 | 14 | 17 | 20 | 21 | 11 | 22 |
| Few actions | 19 | 14 | 9 | 9 | 14 | 11 | 7 | 12 |
| No action | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |

*Base: SMEs that have taken at least one resource efficiency action = 11,113*

## Comparison between the EU and US

SMEs in the US are more likely than those in EU to report the lack of supply of required materials, parts, products or services, as difficulties encountered when establishing resource efficiency actions (21% vs. 11%). US SMEs are also more likely to say a lack of demand for resource efficient products or services was an issue (29% vs. 20%), and to mention that a lack of specific environmental expertise (26% vs. 20%) or the cost of environmental actions (29% vs. 23%) caused them difficulties.

## National analysis

In 18 Member State[22]s, **complex administrative or legal procedures** is the most mentioned difficulty encountered by SMEs. SMEs in France are much more likely to say this than those in other countries (66%), followed by SMEs in Poland (46%) and Greece (44%). This compares to just 9% of SMEs in Estonia and 11% in Germany.

**Q12** Did your company encounter any of the following difficulties when trying to set up resource efficiency actions? (MULTIPLE ANSWERS POSSIBLE)
**(% - COMPLEXITY OF ADMINISTRATIVE OR LEGAL PROCEDURES)**

*Base: SMEs that have taken at least one resource efficiency action = 11,113*

At least three in ten SMEs in France (46%), Sweden (33%), Greece and Denmark (both 30%) mention the **cost of environmental actions**, compared to 8% in Italy and 12% in Lithuania, Bulgaria and Slovakia.

**Q12** Did your company encounter any of the following difficulties when trying to set up resource efficiency actions? (MULTIPLE ANSWERS POSSIBLE)
**(% - COST OF ENVIRONMENTAL ACTIONS)**

*Base: SMEs that have taken at least one resource efficiency action = 11,113*

[22] Albania (55), Montenegro (86), Moldova (88) and FYROM (110) all have a low base size and results should therefore be considered with caution

SMEs in France are also the most likely to mention difficulty in **adapting environmental legislation to their company** (54%), followed by those in Poland (35%) and Belgium (27%). Just 5% of SMEs in Estonia and 8% in Italy, Lithuania and the Czech Republic say the same.

**Q12** Did your company encounter any of the following difficulties when trying to set up resource efficiency actions? (MULTIPLE ANSWERS POSSIBLE)
**(% - DIFFICULTY TO ADAPT ENVIRONMENTAL LEGISLATION TO YOUR COMPANY)**

*Base: SMEs that have taken at least one resource efficiency action = 11,113*

SMEs in France are the most likely to mention a **lack of specific environmental expertise** (43%), followed by those in Belgium and Greece (29%). At the other end of the scale 2% of SMEs in Estonia mention this issue.

**Q12** Did your company encounter any of the following difficulties when trying to set up resource efficiency actions? (MULTIPLE ANSWERS POSSIBLE)
**(% - LACK OF SPECIFIC ENVIRONMENTAL EXPERTISE)**

*Base: SMEs that have taken at least one resource efficiency action = 11,113*

SMEs in France (36%) and Belgium (35%) are also the most likely to mention a **lack of demand for resource efficient products or services**, followed by those in Poland (29%). This compares to 4% of SMEs in Italy and 5% in Lithuania.

**Q12** Did your company encounter any of the following difficulties when trying to set up resource efficiency actions? (MULTIPLE ANSWERS POSSIBLE)
**(% - LACK OF DEMAND FOR RESOURCE EFFICIENT PRODUCTS OR SERVICES)**

*Base: SMEs that have taken at least one resource efficiency action = 11,113*

Almost half (47%) of the SMEs in France taking resource efficiency actions say they had difficulty in **choosing the right resource efficiency actions for their company**, as did 35% in Sweden and 26% in Poland. This issue is least likely to be mentioned by SMEs in Italy (4%) and Germany (6%).

**Q12** Did your company encounter any of the following difficulties when trying to set up resource efficiency actions? (MULTIPLE ANSWERS POSSIBLE)
**(% - DIFFICULTY IN CHOOSING THE RIGHT RESOURCE EFFICIENCY ACTIONS FOR YOUR COMPANY)**

*Base: SMEs that have taken at least one resource efficiency action = 11,113*

SMEs in France (42%) and Greece (29%) are the most likely to mention difficulties due to the **technical requirements of the legislation not being up to date**, while those in Lithuania are the least likely to mention this (4%).

**Q12** Did your company encounter any of the following difficulties when trying to set up resource efficiency actions? (MULTIPLE ANSWERS POSSIBLE)
**(% - TECHNICAL REQUIREMENTS OF THE LEGISLATION NOT BEING UP TO DATE)**

*Base: SMEs that have taken at least one resource efficiency action = 11,113*

At least one in five SMEs in France, Greece (both 21%) and Sweden (20%) say a **lack of supply of required materials, parts, products or services** was a difficulty when setting up resource efficiency actions, compared to just 3% in Italy.

**Q12** Did your company encounter any of the following difficulties when trying to set up resource efficiency actions? (MULTIPLE ANSWERS POSSIBLE)
**(% - LACK OF SUPPLY OF REQUIRED MATERIALS, PARTS, PRODUCTS OR SERVICES)**

*Base: SMEs that have taken at least one resource efficiency action = 11,113*

SMEs in Italy (58%), Estonia (49%), Lithuania and the UK (both 48%) are the most likely to say they **did not experience any difficulties** when setting up resource efficiency actions.

**Q12** Did your company encounter any of the following difficulties when trying to set up resource efficiency actions? (MULTIPLE ANSWERS POSSIBLE)
**(% - NONE (SPONTANEOUS))**

*Base: SMEs that have taken at least one resource efficiency action = 11,113*

Looking more broadly to include non-EU countries shows that SMEs in Turkey are consistently the most likely, or amongst the top two or three most likely to have experienced each of these difficulties[23]. For example, SMEs in Turkey are the second most likely to mention complexity of administrative or legal procedures (59%), after those in France (66%).

[23] Due to low base sizes, care should be taken when interpreting results for Albania (55), Macedonia (110), Montenegro (86) and Moldova (88).

# 2 Does it pay to be 'clean and green'?

## a. Impact of resource efficiency actions on production costs

Companies were asked about the impact their resource efficiency actions have had on production costs over the past two years[24].

**– More than four in ten SMEs say resource efficiency actions have decreased production costs over the past two years –**

Amongst SMEs taking resource efficiency actions, 42% say these actions have decreased their production costs over the past two years - 5% say the decrease has been significant. Just over one in five (21%) say production costs have increased, with 5% saying the increase has been significant. Almost the same proportion (22%) say there has been no change as a result of these actions.

There has been relatively little change in results since 2013, with SMEs slightly less likely to say production costs have not changed (-3 percentage points) or increased (-2 pp) and no change in the proportion who say production costs have decreased as a result of resource efficiency actions.

**Q4** What impact have the undertaken resource efficiency actions had on the production costs over the past two years? The production costs have...
**(% - EU)**

*(September 2015 - September 2013)*

*Base: SMEs that have taken at least one resource efficiency action = 11,113*

[24] Q4. What impact have the undertaken resource efficiency actions had on the production costs over the past two years? The production costs have... (M): significantly decreased (M); slightly decreased (M); slightly increased (M); significantly increased (M); not changed (DO NOT READ OUT) (M); DK/NA.

## Company breakdown

Large companies are more likely than SMEs to say production costs have decreased to some degree as a result of resource efficiency actions (48% vs. 42%)[25].

**Q4** What impact have the undertaken resource efficiency actions had on the production costs over the past two years? The production costs have...
**(% - EU)**

| | Significantly decreased | Slightly decreased | Slightly increased | Significantly increased | Not changed (SPONTANEOUS) | Don't know | Total 'Decreased production costs' | Total 'Increased production costs' |
|---|---|---|---|---|---|---|---|---|
| **SMEs** | | | | | | | | |
| EU28 | 5 | 37 | 16 | 5 | 22 | 15 | 42 | 21 |
| **Large companies** | | | | | | | | |
| EU28 | 8 | 40 | 9 | 10 | 6 | 27 | 48 | 19 |

*Base: Companies that have taken at least one resource efficiency action = 11,248*

Micro SMEs are more likely than larger SMEs to say that resource efficiency actions have increased production costs (21% vs. 15%-18%), or that there has been no change (23% vs. 13%-19%). SMEs with at least ten employees are more likely than micro SMEs to say production costs have decreased (49%-51% vs. 40%).

Amongst micro SMEs, one person operators are more likely than those with 2-9 employees to say production costs have not changed (28% vs 8%).

The sector analysis shows SMEs in manufacturing are the most likely to say resource efficiency actions have decreased production costs (49%), particularly when compared to SMEs in retail (38%). However, along with those in industry, SMEs in manufacturing are also more likely than those in retail and services to say resource efficiency actions have increased production costs (24% and 23% vs. 18% and 16% respectively).

SMEs with the highest turnover are the most likely to say resource efficiency actions have decreased production costs (62% vs. 40%-50%).

**Q4** What impact have the undertaken resource efficiency actions had on the production costs over the past two years? The production costs have...
**(% - EU)**

| | Total 'Decreased production costs' | Total 'Increased production costs' | not changed (SPONTANEOUS) | Don't know |
|---|---|---|---|---|
| EU28 | 42 | 21 | 22 | 15 |
| **Company size** | | | | |
| 1-9 | 40 | 21 | 23 | 16 |
| 10-49 | 51 | 18 | 19 | 12 |
| 50-249 | 49 | 15 | 13 | 23 |
| **Sectors grouped (NACE)** | | | | |
| Manufacturing (C) | 49 | 23 | 20 | 8 |
| Retail (G) | 38 | 18 | 24 | 20 |
| Services (I/J/K/H/L/M) | 44 | 16 | 22 | 18 |
| Industry (B/D/E/F) | 43 | 24 | 21 | 12 |
| **One person company** | | | | |
| Yes | 37 | 20 | 28 | 15 |
| No | 44 | 35 | 8 | 13 |

*Base: SMEs that have taken at least one resource efficiency action = 11,113*

[25] Care should be taken when interpreting the results for large companies, due to low base size (128).

**Q4** What impact have the undertaken resource efficiency actions had on the production costs over the past two years? The production costs have...
**(% - EU)**

| | Total 'Decreased production costs' | Total 'Increased production costs' | not changed (SPONTANEOUS) | Don't know |
|---|---|---|---|---|
| EU28 | 42 | 21 | 22 | 15 |
| **Turnover 2014** | | | | |
| 100,000 euros or less | 40 | 23 | 25 | 12 |
| More than 100-500,000 euros | 42 | 26 | 21 | 11 |
| More than 500,000 - 2 mil. euros | 45 | 17 | 23 | 15 |
| More than 2- 10 mil. euros | 50 | 20 | 20 | 10 |
| More than 10 mil. euros | 62 | 11 | 17 | 10 |
| **Actions undertaken** | | | | |
| Many actions | 50 | 20 | 18 | 12 |
| Some actions | 40 | 22 | 21 | 17 |
| Few actions | 36 | 20 | 28 | 16 |
| No action | 0 | 0 | 0 | 0 |

The more resource efficiency actions an SME has taken, the more likely they are to say that production costs have decreased: 36% of those taking few actions say costs have decreased, compared to 50% of those taking many actions.

*Base: SMEs that have taken at least one resource efficiency action = 11,113*

## Comparison between the EU and US

Compared to those in EU, SMEs in the US are much more likely to report that resource efficiency actions have increased their production costs over the past two years (41% vs. 21%). Almost one in five US SMEs say their actions significantly increased production costs (17%), compared to 5% of EU SMEs. Almost one quarter of the SMEs in US say there has been a slight increase in production costs (24%), compared to 16% of the SMEs in the EU.

## National analysis

In nine Member States the majority of SMEs say that resource efficiency actions have decreased production costs over the past two years. This is particularly the case for SMEs in Greece (65%), Slovenia (61%), Romania and Cyprus (both 60%). In fact, more than one in ten SMEs in Greece (15%) and Cyprus (12%) say that these decreases have been significant, as do 13% of SMEs in Spain. SMEs in Luxembourg (30%) and the UK (32%) are the least likely to say their resource efficiency actions have decreased production costs.

SMEs in Poland (36%), France (34%) and Ireland (33%) are the most likely to say that their resource efficiency actions have increased production costs in the last two years, with 10% in France, 9% in Poland and 8% in Ireland saying the increases have been significant.

The highest proportions of SMEs saying resource efficiency actions have not changed production costs are observed in Denmark (35%), Estonia (34%) and Luxembourg (30%).

Across all countries surveyed, SMEs in Macedonia are the most likely to say production costs have decreased as a result of resource efficiency actions (69%), while Turkey has one of the highest proportions of SMEs saying these costs have increased (39% respectively)[26].

[26] Due to low base sizes, care should be taken when interpreting results for Albania (55), Macedonia (110), Montenegro (86) and Moldova (88).

**Q4** What impact have the undertaken resource efficiency actions had on the production costs over the past two years? The production costs have... **(%)**

*Base: SMEs that have taken at least one resource efficiency action = 11,113*

## Evolution since 2013

As is the case for the EU as a whole, in most Member States there have only been relatively small changes since 2013. There are, however, some notable exceptions.

SMEs in Cyprus (+15 percentage points), Romania and Estonia (both +12 pp) are more likely to say that production costs have decreased than they were in 2013. In contrast, SMEs in Poland (+15 pp), Ireland (+12 pp) and Luxembourg (+10 pp) are now more likely to say that production costs have increased as a result of resource efficiency actions.

SMEs in Poland (-14 pp), France (-13 pp) and the UK (-12 pp) are less likely than they were in 2013 to say production costs have not changed as a result of resource efficiency actions.

Including non-EU countries, the analysis shows that the US (+12 pp) has some of the largest increases of any country in the proportion of SMEs that say production costs have increased[27].

[27] Due to low base sizes, care should be taken when interpreting results for Albania (55), Macedonia (110 Montenegro (86) and Moldova (88).

**Q4** What impact have the undertaken resource efficiency actions had on the production costs over the past two years? The production costs have... **(%)**

| | Significantly decreased | Sept 2015 - Sept 2013 | Slightly decreased | Sept 2015 - Sept 2013 | Slightly increased | Sept 2015 - Sept 2013 | Significantly increased | Sept 2015 - Sept 2013 | Not changed (SPONTANEOUS) | Sept 2015 - Sept 2013 | Don't know | Total 'Decreased production costs' | Sept 2015 - Sept 2013 | Total 'Increased production costs' | Sept 2015 - Sept 2013 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| EU28 | 5 | = | 37 | = | 16 | ▼ 1 | 5 | ▼ 1 | 22 | ▼ 3 | 15 | 42 | = | 21 | ▼ 2 |
| EL | 15 | ▲ 5 | 50 | ▲ 1 | 8 | ▼ 4 | 3 | ▲ 1 | 15 | ▼ 9 | 9 | 65 | ▲ 6 | 11 | ▼ 3 |
| SI | 6 | ▼ 9 | 55 | ▲ 17 | 8 | ▼ 5 | 2 | ▼ 2 | 22 | ▼ 4 | 7 | 61 | ▲ 8 | 10 | ▼ 7 |
| CY | 12 | ▲ 2 | 48 | ▲ 13 | 8 | ▼ 7 | 3 | ▼ 3 | 29 | ▲ 2 | 0 | 60 | ▲ 15 | 11 | ▼ 10 |
| RO | 6 | = | 54 | ▲ 12 | 17 | ▲ 2 | 1 | ▼ 10 | 12 | ▼ 2 | 10 | 60 | ▲ 12 | 18 | ▼ 8 |
| LT | 3 | ▲ 2 | 53 | ▲ 6 | 9 | = | 0 | ▼ 1 | 16 | ▼ 8 | 19 | 56 | ▲ 8 | 9 | ▼ 1 |
| EE | 2 | ▼ 4 | 53 | ▲ 16 | 7 | ▼ 1 | 1 | = | 34 | ▼ 1 | 3 | 55 | ▲ 12 | 8 | ▼ 1 |
| FI | 4 | ▲ 1 | 50 | ▲ 1 | 12 | ▼ 8 | 0 | ▼ 1 | 22 | ▲ 3 | 12 | 54 | ▲ 2 | 12 | ▼ 9 |
| HR | 4 | ▼ 3 | 47 | ▲ 7 | 5 | ▼ 5 | 3 | ▼ 2 | 27 | = | 14 | 51 | ▲ 4 | 8 | ▼ 7 |
| HU | 3 | ▼ 2 | 47 | ▼ 1 | 10 | ▼ 4 | 4 | ▲ 1 | 24 | = | 12 | 50 | ▼ 3 | 14 | ▼ 3 |
| BG | 6 | ▲ 1 | 42 | ▲ 2 | 18 | ▲ 1 | 2 | ▼ 2 | 22 | ▲ 2 | 10 | 48 | ▲ 3 | 20 | ▼ 1 |
| ES | 13 | ▲ 7 | 34 | ▼ 6 | 13 | ▼ 1 | 7 | ▲ 1 | 23 | ▼ 5 | 10 | 47 | ▲ 1 | 20 | = |
| PT | 8 | ▼ 4 | 39 | ▼ 9 | 16 | ▲ 4 | 5 | ▼ 3 | 19 | ▲ 3 | 13 | 47 | ▼ 13 | 21 | ▲ 1 |
| IT | 4 | ▼ 2 | 42 | ▲ 4 | 13 | ▼ 7 | 1 | ▼ 8 | 26 | ▲ 7 | 14 | 46 | ▲ 2 | 14 | ▼ 15 |
| CZ | 4 | ▼ 2 | 41 | ▼ 3 | 12 | = | 3 | = | 23 | = | 17 | 45 | ▼ 5 | 15 | = |
| DE | 4 | = | 41 | ▲ 8 | 7 | ▼ 9 | 1 | ▼ 7 | 26 | ▲ 3 | 21 | 45 | ▲ 8 | 8 | ▼ 16 |
| LV | 6 | ▲ 2 | 38 | ▼ 2 | 18 | = | 7 | ▲ 1 | 22 | ▼ 4 | 9 | 44 | = | 25 | ▲ 1 |
| BE | 3 | ▼ 2 | 39 | ▼ 1 | 16 | ▲ 2 | 5 | ▼ 1 | 25 | ▼ 2 | 12 | 42 | ▼ 3 | 21 | ▲ 1 |
| DK | 5 | ▲ 1 | 36 | ▲ 3 | 10 | = | 2 | ▲ 2 | 35 | ▼ 6 | 12 | 41 | ▲ 4 | 12 | ▲ 2 |
| MT | 3 | = | 38 | ▲ 4 | 23 | ▲ 1 | 3 | ▼ 4 | 25 | ▲ 5 | 8 | 41 | ▲ 4 | 26 | ▼ 3 |
| NL | 6 | ▲ 4 | 34 | ▼ 6 | 14 | ▼ 1 | 1 | ▼ 2 | 22 | ▼ 4 | 23 | 40 | ▼ 2 | 15 | ▼ 3 |
| FR | 5 | ▲ 3 | 34 | ▲ 5 | 24 | ▲ 4 | 10 | ▲ 2 | 18 | ▼ 13 | 9 | 39 | ▲ 8 | 34 | ▲ 6 |
| SK | 4 | ▲ 2 | 33 | ▼ 10 | 14 | ▼ 6 | 4 | = | 24 | ▲ 4 | 21 | 37 | ▼ 8 | 18 | ▼ 6 |
| AT | 3 | ▼ 3 | 32 | ▼ 6 | 15 | ▲ 1 | 4 | ▼ 1 | 21 | = | 25 | 35 | ▼ 9 | 19 | = |
| PL | 6 | ▲ 3 | 29 | ▼ 7 | 27 | ▲ 9 | 9 | ▲ 6 | 15 | ▼ 14 | 14 | 35 | ▼ 4 | 36 | ▲ 15 |
| SE | 2 | ▼ 1 | 33 | ▼ 4 | 15 | ▲ 3 | 3 | ▲ 2 | 26 | ▼ 2 | 21 | 35 | ▼ 5 | 18 | ▲ 5 |
| IE | 3 | ▼ 2 | 31 | ▼ 15 | 25 | ▲ 8 | 8 | ▲ 4 | 15 | ▼ 2 | 18 | 34 | ▼ 17 | 33 | ▲ 12 |
| UK | 2 | ▼ 1 | 30 | ▼ 1 | 21 | ▲ 3 | 4 | ▲ 1 | 19 | ▼ 12 | 24 | 32 | ▼ 2 | 25 | ▲ 4 |
| LU | 3 | ▲ 2 | 27 | ▲ 5 | 30 | ▲ 14 | 2 | ▼ 4 | 30 | ▼ 8 | 8 | 30 | ▲ 7 | 32 | ▲ 10 |
| MK | 0 | ▼ 5 | 69 | ▲ 13 | 13 | ▼ 5 | 0 | ▼ 1 | 15 | ▼ 3 | 3 | 69 | ▲ 8 | 13 | ▼ 6 |
| ME | 10 | ▼ 5 | 43 | ▲ 8 | 13 | ▼ 1 | 2 | ▼ 20 | 26 | ▲ 17 | 6 | 53 | ▲ 3 | 15 | ▼ 21 |
| TR | 16 | ▲ 6 | 37 | ▼ 5 | 24 | ▲ 3 | 15 | ▲ 2 | 5 | ▼ 2 | 3 | 53 | ▲ 1 | 39 | ▲ 5 |
| RS | 11 | ▼ 1 | 35 | ▼ 11 | 10 | ▼ 5 | 9 | ▲ 2 | 31 | ▲ 17 | 4 | 46 | ▼ 12 | 19 | ▼ 3 |
| AL | 4 | ▼ 5 | 20 | ▼ 5 | 28 | ▲ 9 | 8 | ▲ 7 | 28 | ▲ 10 | 12 | 24 | ▼ 10 | 36 | ▲ 16 |
| IS | 4 | = | 28 | ▲ 2 | 9 | ▼ 3 | 0 | ▼ 5 | 41 | ▲ 7 | 18 | 32 | ▲ 2 | 9 | ▼ 8 |
| US | 4 | ▼ 3 | 28 | ▼ 4 | 24 | ▲ 1 | 17 | ▲ 11 | 14 | ▼ 9 | 13 | 32 | ▼ 7 | 41 | ▲ 12 |
| MD | 7 | NA* | 23 | NA* | 28 | NA* | 22 | NA* | 16 | NA* | 4 | 30 | NA* | 50 | NA* |
| NO | 5 | ▲ 1 | 23 | ▼ 8 | 22 | ▲ 5 | 2 | = | 34 | ▲ 3 | 14 | 28 | ▼ 7 | 24 | ▲ 5 |

*Base: Businesses that have taken at least one resource efficiency action = 11,113*
**Question not asked: this country was not included in the previous survey.*

## b. Levels of investment in resource efficiency actions

Companies that had taken resource efficiency actions were asked how much, on average, they had invested in these actions each year[28].

**– Investment in resource efficiency is low –**

Just over one quarter of SMEs that have taken resource efficiency actions did not invest any of their turnover on resource efficiency in the last two years (26%).

Around one quarter of SMEs (24%) invested less than 1% of their annual turnover[29] on resource efficiency actions in the past two years and 26% have invested 1-5% of turnover[30]. Relatively few have invested six to ten percent (6%) or more (3%) per year in order to become more resource efficient.

Since 2013, there has been an increase of 11 percentage points in the proportion of SMEs investing less than one percent of annual turnover to become more resource efficient[31]. During the same period the proportion investing one to five percent (-7 pp), six to ten percent (-2 pp) or eleven percent or more (-2 pp) declined.

**Q5** Over the past two years, how much have you invested on average per year to be more resource efficient?
**(% - EU28)**

*Base: SMEs that have taken at least one resource efficiency action = 11,113*

[28] Q5. Over the past two years, how much have you invested on average per year to be more resource efficient? Nothing (N); Less than 1% of annual turnover; 1- 5% of annual turnover; 6-10% of annual turnover; 11-30% of annual turnover; More than 30% of annual turnover (N); DK/NA.

[29] This proportion does not include the SMEs that did not invest any of their turnover (26%).

[31] In order to provide a comparison with 2013, the nothing and less than 1% categories have been combined. Nothing is a new option for this survey.

## Company breakdown

SMEs are more likely than large companies to have invested nothing in the past two years on their resource efficiency actions (26% vs 5%)[32]. Large companies are more likely than SMEs to have invested at least six percent of their turnover (19% vs 9%).

Q5 Over the past two years, how much have you invested on average per year to be more resource efficient?
(% - EU)

| | Nothing | Less than 1% of annual turnover | 1- 5% of annual turnover | 6-10% of annual turnover | 11-30% of annual turnover | More than 30% of annual turnover | Don't know |
|---|---|---|---|---|---|---|---|
| **SMEs** | | | | | | | |
| EU28 | 26 | 24 | 26 | 6 | 2 | 1 | 15 |
| **Large companies** | | | | | | | |
| EU28 | 5 | 20 | 26 | 5 | 10 | 4 | 30 |

*Base: Companies that have taken at least one resource efficiency action = 11,248*

Micro SMEs are the most likely to have invested nothing on resource efficiency actions over the past two years (29%), compared to 16% of small SMEs and 5% of medium-sized SMEs. Medium-sized SMEs are the most likely to have invested 1-5% of annual turnover (33% vs 25%-28% of smaller SMEs).

Industry sector SMEs are the least likely to have invested nothing (20% vs 26%-27%), but otherwise there are no differences in investment based on sector.

Q5 Over the past two years, how much have you invested on average per year to be more resource efficient?
(% - EU)

| | Nothing | Less than 1% of annual turnover | 1- 5% of annual turnover | 6-10% of annual turnover | 11-30% of annual turnover | More than 30% of annual turnover | Don't know |
|---|---|---|---|---|---|---|---|
| EU28 | 26 | 24 | 26 | 6 | 2 | 1 | 15 |
| **Company size** | | | | | | | |
| 1-9 | 29 | 24 | 25 | 6 | 2 | 1 | 13 |
| 10-49 | 16 | 25 | 28 | 7 | 2 | 1 | 21 |
| 50-249 | 5 | 23 | 33 | 7 | 1 | 0 | 31 |
| **Sectors grouped (NACE)** | | | | | | | |
| Manufacturing (C) | 27 | 24 | 24 | 6 | 3 | 1 | 15 |
| Retail (G) | 27 | 26 | 27 | 4 | 1 | 1 | 14 |
| Services (I/J/K/H/L/M) | 26 | 22 | 26 | 9 | 2 | 1 | 14 |
| Industry (B/D/E/F) | 20 | 23 | 27 | 8 | 4 | 0 | 18 |

*Base: SMEs that have taken at least one resource efficiency action = 11,113*

SMEs with a turnover of 100,000 euros or less are the most likely to say they invested nothing in their resource efficiency actions (35%), particularly compared to SMEs with the highest turnover (9%). SMEs with the highest turnover are the most likely to say they invested less than 1% of their annual turnover (39% vs 26%-28%).

[32] Care should be taken when interpreting the results for large companies, due to low base size (128).

Perhaps not surprisingly, the more resource efficiency actions and SME currently takes, the less likely they are to say they have invested nothing in them in the last two years: 31% of those taking few actions say this, compared to 17% taking many actions.

**Q5** Over the past two years, how much have you invested on average per year to be more resource efficient?
**(% - EU)**

| | Nothing | Less than 1% of annual turnover | 1- 5% of annual turnover | 6-10% of annual turnover | 11-30% of annual turnover | More than 30% of annual turnover | Don't know |
|---|---|---|---|---|---|---|---|
| EU28 | 26 | 24 | 26 | 6 | 2 | 1 | 15 |
| **Turnover 2014** | | | | | | | |
| 100,000 euros or less | 35 | 27 | 25 | 6 | 2 | 0 | 5 |
| More than 100-500,000 euros | 26 | 26 | 30 | 6 | 3 | 1 | 8 |
| More than 500,000 - 2 mil. euros | 19 | 28 | 32 | 9 | 2 | 1 | 9 |
| More than 2- 10 mil. euros | 20 | 27 | 30 | 6 | 3 | 0 | 14 |
| More than 10 mil. euros | 9 | 39 | 29 | 4 | 1 | 0 | 18 |
| **Actions undertaken** | | | | | | | |
| Many actions | 17 | 26 | 31 | 7 | 3 | 1 | 15 |
| Some actions | 30 | 25 | 25 | 6 | 1 | 0 | 13 |
| Few actions | 31 | 22 | 22 | 5 | 2 | 1 | 17 |
| No action | 0 | 0 | 0 | 0 | 0 | 0 | 0 |

*Base: SMEs that have taken at least one resource efficiency action = 11,113*

## Comparison between the EU and US

SMEs in the US are more likely than those in the EU to have invested at least 1% of their annual turnover in resource efficiency over the past two years (50% vs. 35%). Indeed, US SMEs are more likely than their EU counterparts to have invested in resource efficiency actions 1-5% (35% vs. 26%), 6-10% (10% vs. 6%) or 11-30% of their annual turnover (5%v s 2%).

## National analysis

Amongst SMEs in the EU that have invested in resource efficiency actions in the last two years, those in Lithuania (66%), Czech Republic (64%), Latvia (63%), Ireland (62%), Denmark (61%), Estonia and Croatia (both 60%) are the most likely to have **invested none or less than 1%** of their annual turnover. This compared to 38% of SMEs in Germany and 41% in Spain.

In 12 Member States, at least three out of ten SMEs have **invested 1-5%** of their annual turnover in their resource efficiency actions, with the highest proportions observed amongst SMEs in Austria, Sweden (both 33%), Romania, Spain, Germany and Greece (all 32%). This compares to 18% of SMEs in Latvia and 19% in Bulgaria and Slovakia.

SMEs in Greece, Cyprus (both 11%) and Romania (10%) are the most likely to have invested 6-10% of their annual turnover on their resource efficiency actions in the last two years, compared to just 2% of SMEs in Lithuania.

Relatively few SMEs in any Member State have invested 11% or more, and there is also little variation. SMEs in Bulgaria, Poland and Spain are the most likely to have invested 11-30% (all three 5%), while those in Bulgaria are also the most likely to have invested more than 30% (4%).

At least one third of the SMEs in Lithuania (49%), France (38%), Slovakia, Latvia (both 34%) and Cyprus (33%) say they have not invested anything in new actions over the past two years. This compares to 15% of this group of SMEs in Romania and 16% in Germany.

**Q5** Over the past two years, how much have you invested on average per year to be more resource efficient? **(%)**

| | Less than 1% of annual turnover | 1 to 5% of annual turnover | 6 to 10% of annual turnover | 11 to 30% of annual turnover | More than 30% of annual turnover | Don't know |
|---|---|---|---|---|---|---|
| EU28 | 50 | 26 | 6 | 2 | 1 | 15 |
| LT | 66 | 22 | 2 | 3 | 1 | 6 |
| CZ | 64 | 22 | 4 | 1 | 0 | 9 |
| LV | 63 | 18 | 5 | 1 | 3 | 10 |
| IE | 62 | 25 | 5 | 1 | 2 | 5 |
| DK | 61 | 22 | 4 | 4 | 0 | 9 |
| EE | 60 | 21 | 6 | 2 | 3 | 8 |
| HR | 60 | 24 | 3 | 3 | 0 | 10 |
| HU | 59 | 25 | 4 | 1 | 0 | 11 |
| FR | 58 | 25 | 6 | 2 | 2 | 7 |
| NL | 57 | 30 | 5 | 2 | 1 | 5 |
| UK | 57 | 20 | 6 | 1 | 0 | 16 |
| LU | 56 | 25 | 8 | 2 | 0 | 9 |
| BG | 55 | 19 | 8 | 5 | 4 | 9 |
| PL | 55 | 23 | 9 | 5 | 0 | 8 |
| FI | 54 | 30 | 6 | 4 | 2 | 4 |
| SI | 52 | 31 | 6 | 2 | 0 | 9 |
| CY | 51 | 31 | 11 | 2 | 3 | 2 |
| SK | 51 | 19 | 9 | 2 | 0 | 19 |
| BE | 50 | 28 | 7 | 1 | 0 | 14 |
| AT | 48 | 33 | 7 | 0 | 1 | 11 |
| SE | 48 | 33 | 8 | 3 | 1 | 7 |
| PT | 47 | 30 | 7 | 2 | 1 | 13 |
| EL | 46 | 32 | 11 | 1 | 2 | 8 |
| IT | 46 | 21 | 3 | 0 | 0 | 30 |
| RO | 46 | 32 | 10 | 3 | 3 | 6 |
| MT | 45 | 30 | 6 | 0 | 2 | 17 |
| ES | 41 | 32 | 7 | 5 | 1 | 14 |
| DE | 38 | 32 | 5 | 2 | 0 | 23 |
| MK | 70 | 18 | 3 | 0 | 1 | 8 |
| TR | 43 | 29 | 13 | 6 | 3 | 6 |
| RS | 42 | 34 | 7 | 4 | 4 | 9 |
| ME | 34 | 33 | 11 | 6 | 2 | 14 |
| AL | 17 | 39 | 2 | 12 | 0 | 30 |
| IS | 71 | 12 | 2 | 1 | 1 | 13 |
| NO | 54 | 31 | 3 | 1 | 0 | 11 |
| US | 47 | 35 | 10 | 5 | 0 | 3 |
| MD | 37 | 17 | 9 | 12 | 9 | 16 |

*Base: SMEs that have taken at least one resource efficiency action = 11,113*

## c. Return on the investment in resource efficiency actions

**- Eight out of ten SMEs are satisfied with the return on their resource efficiency investments -**

When asked, most SMEs are satisfied with the return on the investments they have made in resource efficiency (80%) – in fact 13% say they are very satisfied[33]. Less than one in five is dissatisfied (16%), with only 3% saying they are very dissatisfied with the return on these investments.

SMEs are much more likely to be satisfied now than they were in 2013, with overall satisfaction increasing by 12 percentage points. Most of this increase has been amongst SMEs who are fairly satisfied (+11 pp).

**Q6** Overall, how satisfied or dissatisfied are you with the return on the investments you have made on resource efficiency?
**(% - EU)**

*(September 2015 - September 2013)*

*Base: SMEs that have invested over the past two years to be more resource efficient = 6,594*

**Company breakdown**

A comparison with large companies was not possible due to low base size for large companies (83).

The larger the SME, the more likely they are to express satisfaction with the return on their resource efficiency investments: 79% of micro SMEs are satisfied, compared to 82% of small-sized SMEs and 86% of medium-sized SMEs.

There is little variation in satisfaction based on sector, although those in services are slightly less likely to be satisfied than SMEs in other sectors (76% vs. 80%-82%).

[33] Q6. Overall, how satisfied or dissatisfied are you with the return on the investments you have made on resource efficiency? (M) Very satisfied; Fairly satisfied; Fairly dissatisfied; Very dissatisfied; DK/NA

**Q6** Overall, how satisfied or dissatisfied are you with the return on the investments you have made on resource efficiency?

| | Very satisfied | Fairly satisfied | Fairly dissatisfied | Very dissatisfied | Don't know | Total 'Satisfied' | Total 'Dissatisfied' |
|---|---|---|---|---|---|---|---|
| EU28 | 13 | 67 | 13 | 3 | 4 | 80 | 16 |
| **Company size** | | | | | | | |
| 1-9 | 12 | 67 | 14 | 3 | 4 | 79 | 17 |
| 10-49 | 14 | 68 | 11 | 1 | 6 | 82 | 12 |
| 50-249 | 9 | 77 | 11 | 0 | 3 | 86 | 11 |
| **Sectors grouped (NACE)** | | | | | | | |
| Manufacturing (C) | 13 | 69 | 12 | 3 | 3 | 82 | 15 |
| Retail (G) | 13 | 67 | 13 | 3 | 4 | 80 | 16 |
| Services (I/J/K/H/L/M) | 14 | 62 | 15 | 2 | 7 | 76 | 17 |
| Industry (B/D/E/F) | 12 | 70 | 15 | 0 | 3 | 82 | 15 |

*Base: SMEs that have invested over the past two years to be more resource efficient = 6,594*

SMEs with a turnover of 100,000 euros or less are the least likely to be satisfied with their return on resource efficiency investments (74% vs 80%-87%).

SMEs that have taken many resource efficiency actions are more likely to be satisfied with their return on investment (85%) compared to those who have taken some (78%) or few (75%) actions.

In addition, SMEs that say resource efficiency actions decreased production costs are more likely to be satisfied with return on investment than those that say production costs increased (84% vs. 74%).

**Q6** Overall, how satisfied or dissatisfied are you with the return on the investments you have made on resource efficiency?

| | Very satisfied | Fairly satisfied | Fairly dissatisfied | Very dissatisfied | Don't know | Total 'Satisfied' | Total 'Dissatisfied' |
|---|---|---|---|---|---|---|---|
| EU28 | 13 | 67 | 13 | 3 | 4 | 80 | 16 |
| **Turnover 2014** | | | | | | | |
| 100,000 euros or less | 11 | 63 | 16 | 5 | 5 | 74 | 21 |
| More than 100-500,000 euros | 14 | 66 | 13 | 3 | 4 | 80 | 16 |
| More than 500,000 - 2 mil. euros | 12 | 71 | 14 | 0 | 3 | 83 | 14 |
| More than 2- 10 mil. euros | 16 | 71 | 7 | 1 | 5 | 87 | 8 |
| More than 10 mil. euros | 12 | 69 | 16 | 0 | 3 | 81 | 16 |
| **Actions undertaken** | | | | | | | |
| Many actions | 12 | 73 | 12 | 1 | 2 | 85 | 13 |
| Some actions | 13 | 65 | 14 | 2 | 6 | 78 | 16 |
| Few actions | 13 | 62 | 15 | 4 | 6 | 75 | 19 |
| No action | 0 | 0 | 0 | 0 | 0 | | |
| **Actions' impact on production costs** | | | | | | | |
| Decreased | 14 | 70 | 12 | 3 | 1 | 84 | 15 |
| Increased | 11 | 63 | 18 | 3 | 5 | 74 | 21 |

*Base: SMEs that have invested over the past two years to be more resource efficient = 6,594*

## Comparison between the EU and US

SMEs in the EU are more likely than their US counterparts to be satisfied with the return on their resource efficiency investments (80% vs. 74%). Nevertheless, SMEs in the US are actually more likely than those in the EU to say they are very satisfied with the return on their investment (21% vs. 13%) and, consequently less likely to be fairly satisfied (53% vs. 67%).

## National analysis

In every Member State more than six in ten of the SMEs that invested in resource efficiency over the last two years are satisfied with the return on their investment. Satisfaction is highest amongst SMEs in Finland (91%), Austria (90%), Cyprus and the UK (both 89%), and lowest amongst those in Latvia (65%), Italy and Croatia (both 66%).

## Evolution since 2013

Since 2013, the proportion of SMEs in each country that are satisfied with their return on their resource efficiency investment has increased, and this is particularly the case amongst SMEs in Portugal and Hungary (both +21 pp)[34].

Including non-EU countries in the analysis shows that SMEs in Serbia (+33 pp) have the largest increase in satisfaction levels since 2013[35].

**Q6** Overall, how satisfied or dissatisfied are you with the return on the investments you have made on resource efficiency?
**(% - Total 'Satisfied')**

*Base: SMEs that have invested over the past two years to be more resource efficient = 6,594*

[34] Due to low base sizes, care should be taken interpreting results from Cyprus (101), Luxembourg (105) and Malta (112).
[35] Due to low base sizes, care should be taken interpreting results from Macedonia (88), Montenegro (63), Albania (34), Iceland (77), Norway (135) and Moldova (55).

# 3 Do policies help companies to become more resource efficient?

## a. General overview

Companies were asked about the kind of support they rely on when trying to be more resource efficient[36].

**– SMEs are much more likely to rely on internal rather than external support for resource efficiency efforts –**

Amongst SMEs that have taken resource efficiency actions, at least six in ten have relied on their own financial resources (63%) or technical expertise (61%). Comparatively few rely on external support (19%).

Since 2013 the proportion of SMEs relying on their own financial resources has increased by three percentage points, while the proportion relying on their own technical expertise has increased by eight points. There has been no change in the proportion relying on external support.

**Q10** Which type of support does your company rely on in its efforts to be more resource efficient? (MULTIPLE ANSWERS POSSIBLE)
**(% - EU28)**

*Base: SMEs that have taken at least one resource efficiency action = 11,113*

[36] Q10. Which type of support does your company rely on in its efforts to be more resource efficient? Its own financial resources; Its own technical expertise; External support; Other (DO NOT READ OUT); DK/NA

## Company breakdown

Compared to SMEs, large companies are much more likely to rely on external support (43% vs. 19%), and they are also more likely to rely on their own technical expertise (73% vs. 61%)[37].

**Q10** Which type of support does your company rely on in its efforts to be more resource efficient? (MULTIPLE ANSWERS POSSIBLE)
**(% - EU)**

| | Its own financial resources | Its own technical expertise | External support | Other (SPONTANEOUS) | Don't know |
|---|---|---|---|---|---|
| **SMEs** | | | | | |
| EU28 | 63 | 61 | 19 | 2 | 5 |
| **Large companies** | | | | | |
| EU28 | 64 | 73 | 43 | 2 | 3 |

*Base: Companies that have taken at least one resource efficiency action = 11,248*

The larger the SME, the more likely it is to rely on external support in its efforts to be more resource efficient: just 17% of micro SMEs rely on external support, compared to 27% of small SMEs and 37% of medium-sized SMEs.

Manufacturing SMEs are the most likely to rely on their own technical expertise, particularly compared to retail SMEs (68% vs. 56%). There are no differences by sector in the proportions that rely on external support

**Q10** Which type of support does your company rely on in its efforts to be more resource efficient? (MULTIPLE ANSWERS POSSIBLE)

| | Its own financial resources | Its own technical expertise | External support | Other (DO NOT READ OUT) | DK/NA |
|---|---|---|---|---|---|
| EU28 | 63 | 61 | 19 | 2 | 5 |
| **Company size** | | | | | |
| 1-9 | 63 | 61 | 17 | 1 | 4 |
| 10-49 | 62 | 58 | 27 | 3 | 5 |
| 50-249 | 67 | 55 | 37 | 1 | 7 |
| **Sectors grouped (NACE)** | | | | | |
| Manufacturing (C) | 64 | 68 | 19 | 1 | 2 |
| Retail (G) | 65 | 56 | 19 | 2 | 6 |
| Services (I/J/K/H/L/M) | 62 | 59 | 19 | 2 | 6 |
| Industry (B/D/E/F) | 59 | 62 | 20 | 2 | 4 |

*Base: SMEs that have taken at least one resource efficiency action = 11,113*

SMEs with a turnover of more than two million euros are the most likely to rely on external support in their efforts to be more resource efficiency (33%) – particularly when compared to those with the lowest turnover (33% vs. 12%). Around one in five SMEs with a turnover between 100,001 and two million euros also rely on external support (19%-23%).

[37] Care should be taken when interpreting the results for large companies, due to low base size (146).

SMEs that have taken many actions are much more likely than those taking some or few actions to say they rely on external support (25% vs. 15%-17%). In addition, SMEs taking many or some actions are more likely than those taking only a few to rely on their own financial resources (66%-69% vs. 53%) or technical expertise (62%-66% vs. 53%).

**Q10** Which type of support does your company rely on in its efforts to be more resource efficient? (MULTIPLE ANSWERS POSSIBLE)

| | Its own financial resources | Its own technical expertise | External support | Other (SPONTANEOUS) | Don't know |
|---|---|---|---|---|---|
| EU28 | 63 | 61 | 19 | 2 | 5 |
| **Turnover 2014** | | | | | |
| 100,000 euros or less | 67 | 61 | 12 | 1 | 3 |
| More than 100-500,000 euros | 68 | 62 | 19 | 2 | 3 |
| More than 500,000 - 2 mil. euros | 63 | 62 | 23 | 1 | 3 |
| More than 2- 10 mil. euros | 62 | 57 | 33 | 5 | 6 |
| More than 10 mil. euros | 68 | 58 | 33 | 0 | 3 |
| **Company's turnover (past 2 years)** | | | | | |
| Increased | 67 | 63 | 23 | 1 | 4 |
| Decreased | 63 | 61 | 16 | 2 | 4 |
| Remained unchanged | 64 | 59 | 20 | 2 | 4 |
| **Actions undertaken** | | | | | |
| Many actions | 69 | 66 | 25 | 1 | 3 |
| Some actions | 66 | 62 | 17 | 1 | 4 |
| Few actions | 53 | 53 | 15 | 3 | 7 |
| No action | 0 | 0 | 0 | 0 | 0 |

*Base: SMEs that have taken at least one resource efficiency action = 11,113*

## Comparison between the EU and US

SMEs in the US are less likely than those in the EU to rely on their own technical expertise for resource efficiency actions (54% vs. 61%).

## National analysis

In 23 Member States, SMEs are most likely to say they rely on their **own financial resources** in their efforts to be more resource efficient. At least three quarters of SMEs in Romania (90%), Croatia (82%), France, Lithuania (both 78%) and Portugal (76%) rely on their own financial resources, compared to 42% of SMEs in Italy. In fact, Italy is the only country where fewer than half of SMEs say they rely on their own financial resources.

Relying on their **own technical expertise** for resource efficiency efforts is most likely to happen in SMEs in Poland (74%), Slovenia (68%), Bulgaria, Hungary and Italy (all 67%), and least likely to occur in SMEs in Romania (23%) and Cyrus (37%).

SMEs in Austria (38%), Denmark (29%), France, the Netherlands and Belgium (all 28%) are the most likely to say they rely on **external support**, while those in Romania are least likely to do so (5%).

Looking at the wider country analysis shows that SMEs in Macedonia (86%) and Turkey (82%) are amongst the top five most likely overall to rely on their own financial resources for resource efficiency actions[38].

**Q10** Which type of support does your company rely on in its efforts to be more resource efficient? (MULTIPLE ANSWERS POSSIBLE) **(%)**

| | Its own financial resources | Its own technical expertise | External support | Other (SPONTANEOUS) | Don't know |
|---|---|---|---|---|---|
| EU28 | 63 | 61 | 19 | 2 | 5 |
| BE | **74** | 50 | *28* | 1 | 8 |
| BG | **67** | **67** | *11* | 1 | 1 |
| CZ | **72** | 63 | *12* | 1 | 5 |
| DK | **63** | 62 | *29* | 5 | 8 |
| DE | **56** | 47 | *21* | 2 | 10 |
| EE | **74** | 62 | *9* | 5 | 4 |
| IE | **60** | 42 | *16* | 0 | 8 |
| EL | **67** | 53 | *7* | 0 | 2 |
| ES | **65** | 58 | *24* | 0 | 1 |
| FR | **78** | 66 | *28* | 2 | 3 |
| HR | **82** | 65 | *8* | 3 | 2 |
| IT | 42 | **67** | *17* | 3 | 2 |
| CY | **70** | 37 | *12* | 5 | 0 |
| LV | **70** | 63 | *12* | 2 | 7 |
| LT | **78** | 44 | *7* | 1 | 6 |
| LU | **51** | 41 | *22* | 3 | 8 |
| HU | **67** | **67** | *13* | 4 | 2 |
| MT | **59** | 55 | *18* | 1 | 2 |
| NL | 52 | **54** | *28* | 1 | 6 |
| AT | 56 | **57** | *38* | 0 | 5 |
| PL | 70 | **74** | *12* | 1 | 1 |
| PT | **76** | 61 | *15* | 2 | 4 |
| RO | **90** | 23 | *5* | 1 | 1 |
| SI | 67 | **68** | *11* | 3 | 2 |
| SK | **62** | 41 | *7* | 3 | 13 |
| FI | **67** | 59 | *20* | 0 | 3 |
| SE | **61** | 54 | *18* | 3 | 8 |
| UK | **67** | 66 | *17* | 1 | 11 |
| AL | 78 | 46 | 7 | 0 | 1 |
| MK | 86 | 66 | 3 | 1 | 0 |
| ME | 71 | 60 | 17 | 0 | 1 |
| RS | 69 | 59 | 9 | 0 | 3 |
| TR | 82 | 34 | 6 | 0 | 1 |
| IS | 57 | 55 | 21 | 5 | 13 |
| MD | 84 | 16 | 15 | 5 | 1 |
| NO | 42 | 55 | 16 | 6 | 9 |
| US | 62 | 54 | 20 | 0 | 6 |

**Highest percentage per country** — *Lowest percentage per country*

Highest percentage per item — Lowest percentage per item

*Base: SMEs that have taken at least one resource efficiency action = 11,113*

[38] Due to low base sizes, care should be taken when interpreting results for Albania (92), Montenegro (95) and Moldova (105).

## Evolution since 2013

Across EU28, the proportion of SMEs relying on their own financial resources for resource efficiency efforts only increased slightly, but there have been larger changes at the individual Member State level. For example, SMEs in France (+19 percentage points), Finland and Denmark (both +10 pp) are now more likely to say they rely on their **own financial resources** than they were in 2013. The reverse is true amongst SMEs in Luxembourg, Malta (both -13 pp) and Austria (-11 pp).

There have been larger changes in the proportions of SMEs using their **own technical expertise**. SMEs in France (+27 pp), Slovenia (+24 pp), Bulgaria (+18 pp), Denmark and Hungary (both +17 pp) are much more likely to be doing this now than they were in 2013.

In contrast, those in Croatia (-27 pp), Slovakia (-18 pp), and Cyprus (-11 pp) are now less likely to be relying on their own technical expertise in their resource efficiency efforts.

SMEs in France (+14 pp), Luxembourg, Denmark and Belgium (all +11 pp) are more likely to be relying on **external support** than they were in 2013, while those in Hungary (-10 pp), Slovenia and Germany (both –9 pp) are less likely to be doing so.

**Q10** Which type of support does your company rely on in its efforts to be more resource efficient? (MULTIPLE ANSWERS POSSIBLE) **(%)**

| | Its own financial resources | Sept. 2015 - Sept. 2013 | Its own technical expertise | Sept. 2015 - Sept. 2013 | External support | Sept. 2015 - Sept. 2013 | Other (SPONTANEOUS) | Sept. 2015 - Sept. 2013 | Don't know |
|---|---|---|---|---|---|---|---|---|---|
| EU28 | 63 | ▲ 3 | 61 | ▲ 8 | 19 | = | 2 | = | 5 |
| BE | 74 | ▼ 4 | 50 | ▲ 6 | 28 | ▲ 11 | 1 | ▼ 2 | 8 |
| BG | 67 | ▲ 8 | 67 | ▲ 18 | 11 | ▼ 2 | 1 | ▼ 2 | 1 |
| CZ | 72 | ▼ 7 | 63 | ▲ 1 | 12 | ▼ 3 | 1 | = | 5 |
| DK | 63 | ▲ 10 | 62 | ▲ 17 | 29 | ▲ 11 | 5 | ▲ 1 | 8 |
| DE | 56 | ▼ 5 | 47 | ▼ 6 | 21 | ▼ 9 | 2 | ▲ 1 | 10 |
| EE | 74 | ▼ 8 | 62 | ▼ 1 | 9 | ▼ 1 | 5 | ▲ 1 | 4 |
| IE | 60 | = | 42 | = | 16 | ▼ 2 | 0 | ▼ 1 | 8 |
| EL | 67 | ▼ 8 | 53 | ▲ 11 | 7 | ▼ 7 | 0 | ▼ 4 | 2 |
| ES | 65 | ▲ 4 | 58 | ▲ 9 | 24 | ▲ 6 | 0 | ▼ 3 | 1 |
| FR | 78 | ▲ 19 | 66 | ▲ 27 | 28 | ▲ 14 | 2 | ▲ 1 | 3 |
| HR | 82 | ▼ 9 | 65 | ▼ 27 | 8 | ▼ 3 | 3 | ▲ 3 | 2 |
| IT | 42 | ▼ 5 | 67 | ▲ 8 | 17 | ▼ 2 | 3 | = | 2 |
| CY | 70 | ▲ 5 | 37 | ▼ 11 | 12 | ▲ 4 | 5 | ▲ 5 | 0 |
| LV | 70 | ▼ 8 | 63 | ▲ 8 | 12 | ▲ 3 | 2 | ▲ 2 | 7 |
| LT | 78 | ▲ 9 | 44 | ▲ 8 | 7 | ▲ 1 | 1 | ▼ 1 | 6 |
| LU | 51 | ▼ 13 | 41 | ▲ 10 | 22 | ▲ 11 | 3 | ▲ 3 | 8 |
| HU | 67 | ▲ 7 | 67 | ▲ 17 | 13 | ▼ 10 | 4 | ▼ 1 | 2 |
| MT | 59 | ▼ 13 | 55 | ▲ 10 | 18 | ▲ 1 | 1 | = | 2 |
| NL | 52 | ▲ 3 | 54 | = | 28 | ▼ 1 | 1 | = | 6 |
| AT | 56 | ▼ 11 | 57 | ▼ 4 | 38 | ▲ 6 | 0 | ▼ 2 | 5 |
| PL | 70 | ▲ 8 | 74 | ▲ 11 | 12 | ▲ 1 | 1 | ▲ 1 | 1 |
| PT | 76 | ▲ 8 | 61 | ▲ 16 | 15 | ▲ 3 | 2 | ▲ 2 | 4 |
| RO | 90 | ▲ 3 | 23 | ▼ 2 | 5 | ▲ 3 | 1 | = | 1 |
| SI | 67 | ▼ 2 | 68 | ▲ 24 | 11 | ▼ 9 | 3 | = | 2 |
| SK | 62 | ▼ 6 | 41 | ▼ 18 | 7 | ▼ 8 | 3 | ▲ 1 | 13 |
| FI | 67 | ▲ 10 | 59 | ▲ 9 | 20 | ▲ 5 | 0 | = | 3 |
| SE | 61 | ▲ 7 | 54 | ▲ 6 | 18 | ▲ 2 | 3 | = | 8 |
| UK | 67 | ▲ 4 | 66 | ▲ 4 | 17 | ▼ 7 | 1 | = | 11 |
| AL | 78 | ▼ 14 | 46 | ▲ 24 | 7 | ▼ 4 | 0 | ▼ 4 | 1 |
| MK | 86 | ▲ 2 | 66 | ▲ 25 | 3 | ▼ 5 | 1 | ▲ 1 | 0 |
| ME | 71 | = | 60 | ▲ 22 | 17 | ▼ 4 | 0 | ▼ 1 | 1 |
| RS | 69 | ▲ 1 | 59 | ▲ 19 | 9 | ▼ 1 | 0 | ▼ 1 | 3 |
| TR | 82 | ▲ 1 | 34 | ▲ 8 | 6 | ▼ 4 | 0 | ▼ 1 | 1 |
| IS | 57 | ▲ 7 | 55 | ▼ 7 | 21 | = | 5 | ▲ 3 | 13 |
| MD | 84 | NA* | 16 | NA* | 15 | NA* | 5 | NA* | 1 |
| NO | 42 | ▼ 32 | 55 | ▲ 2 | 16 | ▼ 1 | 6 | ▲ 4 | 9 |
| US | 62 | ▲ 1 | 54 | ▼ 4 | 20 | ▼ 3 | 0 | ▼ 1 | 6 |

*Base: SMEs that have taken at least one resource efficiency action = 11,113*
**Question not asked: this country was not included in the previous survey.*

Across all countries studied, the largest decrease in the proportion of SMEs relying on their own financial resources is observed amongst those in Norway (-32 pp)[39].

[39] Due to low base sizes, care should be taken when interpreting results for Albania (92), Montenegro (95) and Moldova (105).

## b. Types of external support used by SMEs to be more resource efficient

SMEs that rely on external support were asked for more detail about the kinds of external support they receive[40].

**– SMEs accessing external support for resource efficiency actions do so from a range of sources –**

SMEs that rely on external support for resource efficiency are almost equally likely to have taken advice or other non-financial assistance from private consulting and audit companies (35%), taken private funding from a bank, investment company or venture capital fund (33%), or taken advice or other non-financial assistance from business associations (32%).

Almost one in five received public funding such as grants, guarantees or loans (19%), while 17% received advice or other non-financial assistance from public administration and 10% relied on private funding from friends and relatives.

Overall SMEs are much more likely to have used private sector funding than public sector funding (79% vs. 30%).

Since 2013 the proportion of SMEs using private funding from a bank, investment company or venture capital fund has increased by 12 percentage points. There was also a slight increase in the proportion relying on private funding from friends and relatives (+3 pp). Over the same period there has been a decline in the proportion using advice or other non-financial assistance from private consulting and audit companies (-8 pp), advice or other non-financial assistance from public administration (-5 pp), or advice or other non-financial assistance from business associations (-4 pp).

**Q11** More precisely, which type of external support is it? (MULTIPLE ANSWERS POSSIBLE)
**(% - EU28)**

*Base: SMEs that receive external support to be more resource efficient = 2,146*

[40] Q11. More precisely, which type of external support is it? Public funding such as grants, guarantees or loans (M); Private funding from a bank, investment company or venture capital fund (M); Private funding from friends or relatives (M); Advice or other non-financial assistance from public administration; Advice or other non-financial assistance from private consulting and audit companies; Advice or other non-financial assistance from business associations; Other (DO NOT READ OUT); DK/NA

**Company breakdown**

A comparison with large companies was not possible, due to low base size (55).

The analysis of company characteristics shows that the main difference between SMEs of different sizes is the proportion that access public sector funding: 30% of micro SMEs and 28% of small SMEs do this, compared 46% of medium-sized SMEs.

Most notably, SMEs with 50-249 employees are much more likely to have used public funding in the form of grants, guarantees or loans than smaller SMEs (33% vs. 17%-19%). The largest SMEs are also the most likely to have taken advice or other non-financial assistance from private consulting and audit companies (56% vs 34%-36%).

Services sector SMEs are the most likely to have used advice or other non-financial assistance from private consulting and audit companies (44% vs. 33%-38%) or advice or other non-financial assistance from public administration (23% vs. 14%-18%).

Manufacturing companies are the most likely to have used public funding in the form of grants, guarantees or loans (30% vs. 12%-21%).

Industry SMEs are the most likely to have used private funding from a bank, investment company or venture capital fund (43%), followed by those in manufacturing (37%), services (33%) and retail (27%). Retail SMEs are, however, the most likely to have taken advice or other non-financial assistance from business associations, particularly compared to services SMEs (36% vs. 21%).

Overall, industry SMEs are the most likely to have used private sector support (86% vs. 77%-78%), while those in services or manufacturing are the most likely to have used public sector support (35%-36% vs. 26%-30%).

**Q11** More precisely, which type of external support is it? (MULTIPLE ANSWERS POSSBILE)
**(% - EU)**

| | Public funding such as grants, guarantees or loans | Private funding from a bank, investment company or venture capital fund | Private funding from friends and relatives | Advice or other non-financial assistance from public administration | Advice or other non-financial assistance from private consulting and audit companies | Advice or other non-financial assistance from business associations |
|---|---|---|---|---|---|---|
| EU28 | 19 | 33 | 10 | 17 | 35 | 32 |
| **Company size** | | | | | | |
| 1-9 | 19 | 32 | 12 | 17 | 34 | 32 |
| 10-49 | 17 | 35 | 8 | 15 | 36 | 31 |
| 50-249 | 33 | 37 | 3 | 20 | 56 | 28 |
| **Sectors grouped (NACE)** | | | | | | |
| Manufacturing (C) | 30 | 37 | 11 | 14 | 33 | 30 |
| Retail (G) | 12 | 27 | 11 | 18 | 34 | 36 |
| Services (I/J/K/H/L/M) | 21 | 33 | 14 | 23 | 44 | 21 |
| Industry (B/D/E/F) | 18 | 43 | 7 | 15 | 38 | 30 |

*Base: SMEs that receive external support to be more resource efficient = 2,146*

Almost one third (31%) of SMEs with a turnover of 100,000 or less, used private funding from friends or relatives, compared to 17% among SMEs with a turnover of 100,000 to 500,000, and 0%-4% among SMEs with a higher turnover. SMEs with a turnover of more than 500,000 are the most likely to have taken advice or other non-financial assistance from private consulting and audit companies (41%-58% vs. 23%-28%).

SMEs whose turnover has increased in the last two years are more likely than those whose turnover remained the same or decreased to have taken advice or other non-financial assistance from private consulting and audit companies (44% vs. 27%-30%).

SMEs whose turnover has decreased in the last two years are the most likely to have taken private funding from a bank, investment company or venture capital fund (44% vs. 28%-33%), or from friends and relatives (18% vs. 8%-9%).

The more actions an SME has taken, the more likely it is to have used each kind of external support, with the exception of private funding from friends and relatives. For instance 39% of SMEs taking many actions used private funding from a bank, investment company or venture capital fund, compared to 29% of SMEs taking fewer actions.

**Q11** More precisely, which type of external support is it? (MULTIPLE ANSWERS POSSBILE)
**(% - EU)**

| | Public funding such as grants, guarantees or loans | Private funding from a bank, investment company or venture capital fund | Private funding from friends and relatives | Advice or other non-financial assistance from public administration | Advice or other non-financial assistance from private consulting and audit companies | Advice or other non-financial assistance from business associations |
|---|---|---|---|---|---|---|
| EU28 | 19 | 33 | 10 | 17 | 35 | 32 |
| **Turnover 2014** | | | | | | |
| 100,000 euros or less | 15 | 32 | 31 | 20 | 23 | 26 |
| More than 100-500,000 euros | 23 | 34 | 17 | 21 | 28 | 32 |
| More than 500,000 - 2 mil. euros | 16 | 37 | 2 | 13 | 41 | 29 |
| More than 2- 10 mil. euros | 14 | 39 | 4 | 16 | 58 | 35 |
| More than 10 mil. euros | 27 | 20 | 0 | 24 | 46 | 40 |
| **Company's turnover (past 2 years)** | | | | | | |
| Increased | 19 | 28 | 8 | 17 | 44 | 35 |
| Decreased | 16 | 44 | 18 | 14 | 27 | 35 |
| Remained unchanged | 21 | 33 | 9 | 19 | 30 | 24 |
| **Actions undertaken** | | | | | | |
| Many actions | 25 | 39 | 11 | 21 | 40 | 38 |
| Some actions | 17 | 29 | 10 | 15 | 39 | 24 |
| Few actions | 11 | 29 | 10 | 10 | 23 | 30 |
| No action | 0 | 0 | 0 | 0 | 0 | 0 |

*Base: SMEs that receive external support to be more resource efficient = 2,146*

National analysis was not possible, due to low base sizes.

## c. Supporting resource efficiency: where the focus should lie

All companies were asked what measures they thought would help them be more resource efficient[41].

**– Grants and subsidies are considered the best form of assistance in improving resource efficiency–**

Almost one third of SMEs think that grants or subsidies would help their company be more resource efficient (32%), and this is the most mentioned form of assistance. Just over one in five SMEs think consultancy on how to improve resource efficiency would be of assistance (21%), while 19% say this about advice on funding possibilities and financial planning for resource efficiency investments. Better cooperation between companies across sectors so that new processes to re-use waste and by-products can be developed, and the abolition of legislative obstacles to the use of waste and by-products are mentioned by 18% of SMEs. Almost as many (17%) say demonstration of new technologies or processes to improve resource efficiency would help them be more resource efficient.

At least one in ten SMEs say a database with case studies that show the benefits of resource efficiency for companies (13%), or a tool to self-assess how resource efficient their company is with respect to other companies (11%) would be of assistance.

Just over one in five SMEs, on the other hand, say none of these things would help them to be more resource efficient (22%).

SMEs are generally less likely than they were in 2013 to say each of these measures would help them to be more resource efficient, although in most cases the difference is three percentage points or less. The largest decreases are observed in the mention of a self-assessment tool (-5 percentage points) and for a consultancy on how to improve resource efficiency (-4 pp). There has, however, been a seven percentage point increase in the proportion of SMEs that say none of these measures would help them to be more resource efficient.

*Base: All SMEs (12,913)*

41 Q13. Which of the following would help your company the most to be more resource efficient? A tool to self-assess how resource efficient your company is with respect to other companies (M); Consultancy on how to improve resource efficiency in your company; Grants or subsidies ; Advice on funding possibilities and financial planning for resource efficiency investments (M); Demonstration of new technologies or processes to improve resource efficiency; Databases with case studies that show the benefits of resource efficiency for companies; Better cooperation between companies across sectors so that new processes to re-use waste and by-products can be developed (M); Abolition of legislative obstacles to the use of waste and by-products (N); Other (DO NOT READ OUT); None (DO NOT READ OUT); DK/NA.

## Company breakdown

Compared to SMEs, large companies are more likely to say "a self-assessment tool" (19% vs. 11%), "demonstrations of new technology or processes" (23% vs. 17%) or "a case study database" (18% vs. 13%) would help them be more resource efficient.

**Q13** Which of the following would help your company the most to be more resource efficient? (MAX. 3 ANSWERS POSSIBLE)
**(% - EU)**

| | A tool to self-assess how resource efficient your company is with respect to other companies | Consultancy on how to improve resource efficiency in your company | Grants or subsidies | Advice on funding possibilities and financial planning for resource efficiency investments | Demonstration of new technologies or processes to improve resource efficiency | Database with case studies that show the benefits of resource efficiency for companies | Better cooperation between companies across sectors so that new processes to re-use waste and by-products can be developed | Abolition of legislative obstacles to the use of waste and by-products |
|---|---|---|---|---|---|---|---|---|
| **SMEs** | | | | | | | | |
| EU28 | 11 | 21 | 32 | 19 | 17 | 13 | 18 | 18 |
| **Large companies** | | | | | | | | |
| EU28 | 19 | 24 | 28 | 20 | 23 | 18 | 16 | 14 |

*Base: All companies (13,114)*

There are few differences between SMEs based on company size. Medium-sized SMEs are the most likely to say "grants or subsidies" would help (43% vs. 31%-34%), and they are also the most likely to mention "advice on funding possibilities" and "financial planning for resource efficiency" (26% vs. 19%). The smaller the SME, the more likely it is to say that none of these measures would help: 7% of medium-sized SMEs say this, compared to 17% of small SMEs and 24% of micro SMEs.

Within the micro SME group, solo operators are more likely than those with 2-9 employees to say none of these measures would help them be more resource efficient (31% vs. 15%).

Industry sector SMEs are the most likely to say grants or subsidies (38% vs. 29%-33%), would help them to become more resource efficient. Services and retail SMEs are the most likely to say none of the measures asked about would help them on this purpose (28% and 25% vs. 16%-19%).

**Q13** Which of the following would help your company the most to be more resource efficient? (MAX. 3 ANSWERS POSSIBLE)
**(% - EU)**

| | A tool to self-assess how resource efficient your company is with respect to other companies | Consultancy on how to improve resource efficiency in your company | Grants or subsidies | Advice on funding possibilities and financial planning for resource efficiency investments | Demonstration of new technologies or processes to improve resource efficiency | Database with case studies that show the benefits of resource efficiency for companies | Better cooperation between companies across sectors so that new processes to re-use waste and by-products can be developed | Abolition of legislative obstacles to the use of waste and by-products |
|---|---|---|---|---|---|---|---|---|
| EU28 | 11 | 21 | 32 | 19 | 17 | 13 | 18 | 18 |
| **Company size** | | | | | | | | |
| 1-9 | 11 | 20 | 31 | 19 | 17 | 12 | 17 | 17 |
| 10-49 | 12 | 26 | 34 | 19 | 20 | 16 | 20 | 20 |
| 50-249 | 18 | 23 | 43 | 26 | 22 | 19 | 15 | 14 |
| **Sectors grouped (NACE)** | | | | | | | | |
| Manufacturing (C) | 12 | 21 | 33 | 22 | 17 | 13 | 19 | 19 |
| Retail (G) | 12 | 20 | 30 | 18 | 17 | 13 | 18 | 16 |
| Services (I/J/K/H/L/M) | 10 | 20 | 29 | 17 | 17 | 11 | 14 | 15 |
| Industry (B/D/E/F) | 10 | 25 | 38 | 19 | 18 | 13 | 18 | 23 |
| **One person company** | | | | | | | | |
| Yes | 11 | 14 | 25 | 19 | 13 | 10 | 14 | 11 |
| No | 13 | 15 | 37 | 32 | 23 | 14 | 14 | 22 |

*Base: All SMEs (12,913)*

SMEs with a turnover of more than ten million euros are the most likely to say "a database with case studies" (20% vs. 13%-15%) or "a self-assessment tool" (21% vs. 10%-14%) would help them be more resource efficient. SMEs with a turnover of more than two million are the most likely to mention "a demonstration of new technologies".

The more actions an SME is already taking, the more likely they are to say that each type of support would help them be more resource efficient. For example, 27% of SMEs taking many resource efficiency actions say that "better cooperation between companies across sectors so that new processes to re-use waste and by-products can be developed" would help them, compared to 19% among SMEs taking some actions, 12% among SMEs taking few actions and 7% among those taking no actions. The same general trend applies also comparing SMEs planning many, some, few or no additional resource efficiency actions in the future.

In a consistent manner, the fewer actions an SME takes, the more likely they are to say none of these measures would help them to become more resource efficient.

SMEs planning to offer green products or services are more likely than those already doing so to mention "grants or subsidies" (45% vs. 37%), consultancy (29% vs. 24%) or "advice on funding possibilities" and "financial planning for resource efficiency" (32% vs. 23%)[42]. In addition, both of these groups of SMEs are more likely to mention each kind of support compared to SMEs that are not offering green products or services and have no plans to do so.

**Q13** Which of the following would help your company the most to be more resource efficient? (MAX. 3 ANSWERS POSSIBLE)
**(% - EU)**

| | A tool to self-assess how resource efficient your company is with respect to other companies | Consultancy on how to improve resource efficiency in your company | Grants or subsidies | Advice on funding possibilities and financial planning for resource efficiency investments | Demonstration of new technologies or processes to improve resource efficiency | Database with case studies that show the benefits of resource efficiency for companies | Better cooperation between companies across sectors so that new processes to re-use waste and by-products can be developed | Abolition of legislative obstacles to the use of waste and by-products |
|---|---|---|---|---|---|---|---|---|
| EU28 | 11 | 21 | 32 | 19 | 17 | 13 | 18 | 18 |
| **Turnover 2014** | | | | | | | | |
| 100,000 euros or less | 10 | 17 | 29 | 20 | 16 | 13 | 17 | 18 |
| More than 100-500,000 euros | 12 | 24 | 37 | 23 | 19 | 13 | 19 | 19 |
| More than 500,000 - 2 mil. euros | 13 | 25 | 32 | 18 | 19 | 15 | 20 | 20 |
| More than 2- 10 mil. euros | 14 | 21 | 31 | 20 | 24 | 13 | 21 | 16 |
| More than 10 mil. euros | 21 | 21 | 37 | 16 | 23 | 20 | 16 | 12 |
| **Actions undertaken** | | | | | | | | |
| Many actions | 17 | 25 | 40 | 27 | 23 | 18 | 27 | 25 |
| Some actions | 11 | 27 | 38 | 21 | 20 | 14 | 19 | 19 |
| Few actions | 7 | 17 | 25 | 14 | 11 | 10 | 12 | 15 |
| No action | 6 | 8 | 14 | 10 | 9 | 4 | 7 | 5 |
| **Offer green products or services** | | | | | | | | |
| Yes | 13 | 24 | 37 | 23 | 23 | 16 | 24 | 19 |
| No, but planning to do so | 11 | 29 | 45 | 32 | 24 | 18 | 24 | 20 |
| No, and not planning to do so | 10 | 19 | 28 | 15 | 14 | 11 | 15 | 17 |

*Base: All SMEs (12,913)*

## Comparison between the EU and US

SMEs in the US are more likely than their EU counterparts to say demonstration of new technologies or processes to improve resource efficiency would most help them to be more resource efficiency (28% vs. 17%). US SMEs are also more likely to mention better cooperation between companies across sectors so that new processes to re-use waste and by-products can be developed (25% vs. 18%). EU SMEs, on the other hand, are more likely than those in the US to mention consultancy on how to improve resource efficiency (21% vs. 12%), or grants or subsidies (32% vs. 24%).

[42] See section 2.1 for full results of this question.

## National analysis[43]

In all but five Member States, SMEs are most likely to say that **grants and subsidies** would help them to be more resource efficient. Cyprus is the only country where at least half of all SMEs say this (53%), followed by those in Croatia (48%), France (45%) and Malta (41%). At the other end of the scale 17% of SMEs in Finland and 22% in Romania mention grants or subsidies.

SMEs in Serbia (41%) are among the most likely across all countries to say grants or subsidies would help them be more resource efficient.

**Q13** Which of the following would help your company the most to be more resource efficient? (MAX. 3 ANSWERS)
**(% - GRANTS OR SUBSIDIES)**

*Base: All SMEs (12,913)*

At least one third of SMEs in Croatia, France (both 34%) and Spain (33%) say **consultancy on how to improve resource efficiency** would help them, compared to 8% in Estonia and Italy.

**Q13** Which of the following would help your company the most to be more resource efficient? (MAX. 3 ANSWERS)
**(% - CONSULTANCY ON HOW TO IMPROVE RESOURCE EFFICIENCY IN YOUR COMPANY)**

*Base: All SMEs (12,913)*

[43] Due to low base sizes, care should be taken when interpreting results for Albania (92), Montenegro (95) and Moldova (103).

**Advice on funding possibilities and financial planning for resource efficiency investments** is most likely to be mentioned by SMEs in Greece (33%), France and Portugal (both 29%), and least likely to be mentioned by those in Italy (8%).

**Q13** Which of the following would help your company the most to be more resource efficient? (MAX. 3 ANSWERS)
**(% - ADVICE ON FUNDING POSSIBILITIES AND FINANCIAL PLANNING FOR RESOURCE EFFICIENCY INVESTMENTS)**

*Base: All SMEs (12,913)*

SMEs in France (28%), Austria (25%) and Spain (23%) are the most likely to say **abolition of legislative obstacles to the use of waste and by-products** would help them be more resource efficient.

**Q13** Which of the following would help your company the most to be more resource efficient? (MAX. 3 ANSWERS)
**(% - ABOLITION OF LEGISLATIVE OBSTACLES TO THE USE OF WASTE AND BY-PRODUCTS)**

*Base: All SMEs (12,913)*

In contrast, 3% of SMEs in Cyprus and 4% in Estonia say the same. **Better cooperation between companies across sectors so that new processes to re-use waste and by-products can be developed** is mentioned by at least one quarter of SMEs in France, Belgium (both 29%), Finland (26%) and Sweden (25%), but by only 5% in Germany and 9% in Cyprus and Italy.

**Q13** Which of the following would help your company the most to be more resource efficient? (MAX. 3 ANSWERS)
**(% - BETTER COOPERATION BETWEEN COMPANIES ACROSS SECTORS SO THAT NEW PROCESSES TO RE-USE WASTE AND BY-PRODUCTS CAN BE DEVELOPED)**

*Base: All SMEs (12,913)*

**Demonstration of new technologies or processes to improve resource efficiency** is most likely to be mentioned as helpful by SMEs in Portugal (33%), the Czech Republic (28%), France and Denmark (both 27%).

SMEs in Turkey (30%) are the second most likely, after those in Portugal, to mention demonstrations of new technologies or processes. The results for SMEs in the US (28%) are also in the same range as the top four for the EU.

**Q13** Which of the following would help your company the most to be more resource efficient? (MAX. 3 ANSWERS)
**(% - DEMONSTRATION OF NEW TECHNOLOGIES OR PROCESSES TO IMPROVE RESOURCE EFFICIENCY)**

*Base: All SMEs (12,913)*

At the other end of the scale 6% of SMEs in Italy also mention demonstrations. SMEs in Luxembourg (24%), Portugal (22%) and Austria (21%) are the most likely to say a **database with case studies that show the benefits of resource efficiency** would help them to be more resource efficient, while those in Italy (1%) and Estonia (4%) are least likely to mention this.

SMEs in Turkey (23%) are the second most likely, after those in Luxembourg, to mention a database with case studies.

**Q13** Which of the following would help your company the most to be more resource efficient? (MAX. 3 ANSWERS)
**(% - DATABASE WITH CASE STUDIES THAT SHOW THE BENEFITS OF RESOURCE EFFICIENCY FOR COMPANIES)**

*Base: All SMEs (12,913)*

At least one in five SMEs in Belgium (23%), Sweden (22%) and Finland (20%) say a **self-assessment tool** would help them, compared to 3% of SMEs in Estonia and Italy.

**Q13** Which of the following would help your company the most to be more resource efficient? (MAX. 3 ANSWERS)
**(% - A TOOL TO SELF-ASSESS HOW RESOURCE EFFICIENT YOUR COMPANY IS WITH RESPECT TO OTHER COMPANIES)**

*Base: All SMEs (12,913)*

SMEs in Estonia (41%) and Italy (40%) are much more likely than those in other Member States to say that **none of these t**hings would help them to be more resource efficient.

**Q13** Which of the following would help your company the most to be more resource efficient? (MAX. 3 ANSWERS)
**(% - NONE (SPONTANEOUS))**

*Base: All SMEs (12,913)*

## Evolution since 2013

At an overall EU level there have been relatively small changes since 2013 (1-5 percentage points), but this is not echoed in all Member States. Going against the general EU trend, SMEs in Cyprus (+14 pp) and France (+10 pp) are more likely than they were in 2013 to mention grants or subsidies. SMEs in Slovenia (-25 pp), the Czech Republic (-12 pp), Croatia and Greece (both -10 pp) on the other hand are less likely to do so.

SMEs in Italy (-17 pp) and Hungary (-10 pp) are less likely to mention consultancy compared to 2013, while those in France and Cyprus (both +5 pp) are more likely to do so. Advice on funding possibilities and financial planning for resource efficiency investments is less likely to be mentioned by SMEs in Luxembourg (-11 pp) and the Netherlands (-10 pp) compared to 2013.

SMEs in France (+12 pp) and Denmark (+10 pp) are more likely to mention better cooperation between companies across sectors so that new processes to re-use waste and by-products can be developed, while those in Slovakia (-13 pp) and Italy (-12 pp) are now less likely to do so than they were in 2013.

There has been a ten percentage point increase in the proportion of SMEs in France that mention a demonstration of new technologies or processes to improve resource efficiency (+10 pp), but an equivalent drop amongst SMEs in Greece and Germany (both -10 pp).

SMEs in Luxembourg are now much more likely to mention a case study database (+17 pp), as are SMEs in Denmark (+11 pp) and France (+10 pp). In contrast, SMEs in Germany (-11 pp), Ireland and Slovakia (both -10 pp) are less likely to mention this than they were in 2013.

SMEs in the Netherlands (-14 pp), Italy and Germany (both -11 pp) are now less likely to mention a self-assessment tool.

Looking across both EU and non-EU countries shows SMEs in Macedonia have the second decline in mentions of grants and subsidies (-19 pp and -15 pp respectively) after Slovenia[44]. SMEs in the US have the third largest decline in mentions of consultancy on how to improve resource efficiency (-16 pp and -12 pp respectively) after Italy.

Across all countries studied SMEs in Turkey have shown the largest increase in the proportions who say that advice on funding possibilities and financial planning for resource efficiency investments would help them to be more resource efficient (+13 pp).

**Q13** Which of the following would help your company the most to be more resource efficient? (MAX. 3 ANSWERS) **(%)**

| | Grants or subsidies | Sept 2015 - Sept. 2013 | Consultancy on how to improve resource efficiency in your company | Sept 2015 - Sept. 2013 | Advice on funding possibilities and financial planning for resource efficiency investments | Sept 2015 - Sept. 2013 | Abolition of legislative obstacles to the use of waste and by-products* | Better cooperation between companies across sectors so that new processes to re-use waste and by-products can be developed | Sept 2015 - Sept. 2013 | Demonstration of new technologies or processes to improve resource efficiency | Sept 2015 - Sept. 2013 | Database with case studies that show the benefits of resource efficiency for companies | Sept 2015 - Sept. 2013 | A tool to self-assess how resource efficient your company is with respect to other companies | Sept 2015 - Sept. 2013 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| EU28 | 32 | ▼ 2 | 21 | ▼ 4 | 19 | ▼ 3 | 18 | 18 | ▼ 1 | 17 | ▼ 2 | 13 | ▼ 3 | 11 | ▼ 5 |
| BE | 32 | ▼ 5 | 20 | ▼ 4 | 25 | ▼ 2 | 13 | 29 | ▲ 4 | 24 | ▼ 1 | 20 | ▲ 1 | 23 | ▼ 4 |
| BG | 29 | ▲ 2 | 15 | ▼ 6 | 13 | ▲ 4 | 17 | 19 | ▲ 7 | 17 | ▲ 3 | 14 | ▼ 6 | 6 | ▼ 3 |
| CZ | 26 | ▼12 | 20 | ▲ 1 | 20 | ▼ 1 | 22 | 18 | ▼ 4 | 28 | ▼ 1 | 16 | ▲ 1 | 5 | ▼ 2 |
| DK | 30 | = | 31 | ▲ 2 | 12 | ▼ 2 | 11 | 20 | ▲10 | 27 | ▲ 6 | 20 | ▲11 | 18 | ▲ 5 |
| DE | 32 | ▲ 1 | 21 | ▼ 4 | 15 | ▼ 6 | 16 | 5 | ▼ 6 | 12 | ▼10 | 12 | ▼11 | 13 | ▼11 |
| EE | 24 | ▼ 2 | 8 | ▼ 2 | 12 | ▼ 4 | 4 | 11 | ▲ 2 | 14 | ▼ 2 | 4 | ▼ 9 | 3 | ▼ 3 |
| IE | 40 | ▼ 1 | 24 | ▲ 2 | 24 | ▼ 5 | 11 | 23 | ▲ 5 | 21 | ▼ 4 | 18 | ▼10 | 15 | ▼ 5 |
| EL | 38 | ▼10 | 19 | ▼ 9 | 33 | ▲ 6 | 16 | 13 | ▼ 3 | 18 | ▼10 | 19 | ▲ 3 | 15 | ▼ 5 |
| ES | 36 | ▼ 5 | 33 | ▼ 3 | 23 | ▲ 2 | 23 | 16 | ▼ 5 | 17 | ▼ 5 | 16 | ▼ 9 | 12 | ▼ 3 |
| FR | 45 | ▲10 | 34 | ▲ 5 | 29 | ▲ 6 | 28 | 29 | ▲12 | 27 | ▲10 | 20 | ▲10 | 16 | ▲ 3 |
| HR | 48 | ▼10 | 34 | ▲ 2 | 25 | ▼ 4 | 12 | 17 | ▲ 4 | 12 | ▼ 5 | 13 | ▼ 4 | 7 | ▲ 1 |
| IT | 24 | ▼ 7 | 8 | ▼17 | 8 | ▼ 9 | 13 | 9 | ▼12 | 6 | ▼ 8 | 1 | ▼ 8 | 3 | ▼11 |
| CY | 53 | ▲14 | 26 | ▲ 5 | 15 | ▼ 2 | 3 | 9 | ▼ 5 | 14 | ▼ 3 | 5 | ▼ 1 | 5 | ▼ 3 |
| LV | 29 | ▼ 1 | 24 | ▼ 5 | 27 | ▼ 2 | 10 | 17 | ▲ 2 | 22 | ▲ 3 | 11 | ▼ 3 | 12 | ▼ 3 |
| LT | 26 | ▲ 1 | 20 | ▼ 7 | 17 | ▼ 8 | 7 | 13 | ▼ 4 | 22 | = | 5 | ▼ 7 | 11 | ▲ 1 |
| LU | 35 | ▼ 3 | 29 | ▲ 2 | 18 | ▼11 | 9 | 21 | ▲ 2 | 21 | ▲ 4 | 24 | ▲17 | 15 | ▼ 1 |
| HU | 37 | ▼ 5 | 12 | ▼10 | 14 | ▼ 2 | 8 | 15 | = | 17 | ▲ 2 | 13 | ▲ 1 | 6 | = |
| MT | 41 | ▼ 1 | 30 | ▲ 1 | 28 | ▼ 6 | 13 | 18 | = | 18 | ▲ 4 | 13 | ▲ 1 | 16 | ▲ 3 |
| NL | 29 | ▲ 6 | 18 | ▼ 1 | 13 | ▼10 | 19 | 24 | ▼ 2 | 18 | ▼ 5 | 12 | ▼ 9 | 13 | ▼14 |
| AT | 31 | ▼ 8 | 22 | ▼ 4 | 19 | ▼ 7 | 25 | 18 | ▼ 1 | 26 | ▼ 1 | 21 | ▲ 1 | 17 | ▼ 1 |
| PL | 29 | ▼ 9 | 16 | ▼ 7 | 24 | ▼ 3 | 18 | 21 | ▲ 3 | 14 | ▼ 3 | 13 | ▼ 4 | 9 | ▼ 5 |
| PT | 25 | ▲ 4 | 31 | ▲ 1 | 29 | ▲ 2 | 19 | 22 | ▼ 6 | 33 | ▲ 4 | 22 | = | 19 | ▼ 2 |
| RO | 22 | ▼ 9 | 18 | ▼ 1 | 21 | ▼ 1 | 17 | 21 | ▼ 3 | 13 | ▼ 2 | 12 | ▼ 1 | 7 | ▲ 2 |
| SI | 31 | ▼25 | 14 | ▼ 7 | 13 | ▼ 5 | 19 | 14 | ▲ 2 | 17 | ▲ 7 | 11 | ▲ 4 | 4 | ▼ 7 |
| SK | 28 | ▼ 9 | 20 | ▼ 2 | 19 | ▼ 8 | 22 | 14 | ▼13 | 17 | ▼ 2 | 9 | ▼10 | 7 | ▼ 3 |
| FI | 17 | ▼ 6 | 23 | ▼ 3 | 15 | ▲ 7 | 16 | 26 | ▼ 2 | 20 | ▲ 2 | 18 | ▼ 2 | 20 | ▼ 8 |
| SE | 26 | = | 30 | ▼ 1 | 22 | ▲ 4 | 10 | 25 | ▲ 9 | 24 | ▲ 8 | 15 | ▲ 2 | 22 | ▲ 4 |
| UK | 40 | ▲ 4 | 15 | = | 24 | ▼ 4 | 15 | 21 | ▲ 8 | 20 | ▲ 1 | 15 | ▼ 2 | 17 | ▼ 5 |
| AL | 17 | ▼15 | 13 | ▼16 | 16 | ▼ 6 | 3 | 4 | ▼ 6 | 4 | ▼19 | 5 | ▼ 1 | 4 | ▼18 |
| MK | 28 | ▼19 | 28 | ▲ 3 | 31 | ▼ 8 | 7 | 19 | ▼ 5 | 11 | ▲ 2 | 11 | ▲ 6 | 4 | ▼ 9 |
| ME | 58 | ▲13 | 21 | ▲ 6 | 16 | ▼ 3 | 11 | 35 | ▲14 | 29 | ▲15 | 11 | ▼ 6 | 2 | ▼ 3 |
| RS | 41 | ▲ 2 | 19 | ▲ 3 | 14 | ▼ 1 | 14 | 18 | = | 19 | ▲ 7 | 9 | ▲ 1 | 8 | ▲ 4 |
| TR | 29 | ▲ 3 | 30 | ▲ 5 | 31 | ▲13 | 13 | 24 | = | 30 | ▲ 3 | 23 | ▲ 3 | 19 | ▼ 7 |
| IS | 24 | ▼ 1 | 21 | ▼ 8 | 10 | ▲ 1 | 8 | 25 | ▲ 9 | 25 | ▲ 1 | 15 | ▲ 5 | 8 | ▼ 2 |
| MD | 47 | NA** | 23 | NA** | 19 | NA** | 15 | 25 | NA** | 27 | NA** | 19 | NA** | 4 | NA** |
| NO | 14 | ▼ 7 | 12 | ▼ 5 | 18 | ▼ 2 | 9 | 27 | ▲11 | 19 | ▼ 1 | 5 | ▼ 2 | 18 | ▼ 5 |
| US | 24 | ▼ 7 | 12 | ▼12 | 16 | ▼ 6 | 19 | 25 | = | 28 | ▼ 8 | 17 | ▼ 4 | 14 | ▼14 |

*Base: All SMEs (12,913)*

**New item*

***Question not asked: this country was not included in the previous survey.*

[44] Due to low base sizes, care should be taken when interpreting results for Albania (92), Montenegro (95) and Moldova (103).

# 4 Identifying the barriers of applying for public tenders with environmental requirements

## a. General overview

All companies were asked if they had bid for a public tender that included environmental requirements[45].

**- Most SMEs did not bid for a public procurement tender including environmental requirements, over the last two years –**

Just over one in twenty SMEs (6%) have successfully bid for a public procurement tender that included environmental requirements. A further 3% bid unsuccessfully, while for 2% the outcome of their bid is unknown.

Overall, 11% of SMEs have made a bid in the last two years. However, most SMEs have not bid on such a tender in the last two years (86%).

There has been no notable change since 2013.

**Q7** In the last two years, did your company bid for a public procurement tender that included environmental requirements?
**(% - EU)**

*(September 2015 - September 2013)*

*Base: All SMEs (12,913)*

Compared to SMEs, large companies are more likely to have made a bid on this kind of public procurement tender in the last two years (19% vs. 11%), and in particular they are more likely to have been successful (17% vs. 6%)[46].

[45] In the last 2 years, did your company bid for a public procurement tender that included environmental requirements? (M) Yes, successfully; Yes, unsuccessfully; Yes, but outcome is unknown; No; DK/NA

[46] Care should be taken when interpreting the results for large companies, due to low base size (146).

**Q7** In the last two years, did your company bid for a public procurement tender that included environmental requirements?
**(% - EU)**

| | Yes, successfully | Yes, unsuccessfully | Yes, but outcome is unknown | No | Don't know | Total 'Yes' |
|---|---|---|---|---|---|---|
| EU28 | 6 | 3 | 2 | 86 | 3 | 11 |
| **SMEs** | | | | | | |
| EU28 | 6 | 3 | 2 | 86 | 3 | 11 |
| **Large companies** | | | | | | |
| EU28 | 17 | 0 | 2 | 69 | 12 | 19 |

*Base: All companies (13,114)*

The larger the SME, the more likely it is to have made a successful bid on a public procurement tender with environmental requirements in the last two years.

Just 4% of micro SMEs have bid successfully, compared to 12% of small SMEs and 21% of medium-sized SMEs. There are no notable differences between these groups of SMEs in terms of unsuccessful bids and bids where the outcome is unknown.

Industry SMEs are the most likely to have made a successful bid (12% vs. 4%-6%), and are also the most likely to have made a bid in general (21% vs. 7%-9%).

**Q7** In the last two years, did your company bid for a public procurement tender that included environmental requirements?

| | Yes, successfully | Yes, unsuccessfully | Yes, but outcome is unknown | No | Don't know | Total 'Yes' |
|---|---|---|---|---|---|---|
| EU28 | 6 | 3 | 2 | 86 | 3 | 11 |
| **Company size** | | | | | | |
| 1-9 | 4 | 3 | 1 | 89 | 3 | 8 |
| 10-49 | 12 | 4 | 3 | 77 | 4 | 19 |
| 50-249 | 21 | 3 | 4 | 64 | 8 | 28 |
| **Sectors grouped (NACE)** | | | | | | |
| Manufacturing (C) | 6 | 2 | 1 | 88 | 3 | 9 |
| Retail (G) | 4 | 2 | 1 | 90 | 3 | 7 |
| Services (I/J/K/H/L/M) | 5 | 3 | 1 | 87 | 4 | 9 |
| Industry (B/D/E/F) | 12 | 6 | 3 | 74 | 5 | 21 |

*Base: All SMEs (12,913)*

SMEs with a turnover of more than 10 million euros are the most likely to have made a successful bid (18% vs. 2%-8%). SMEs with the lowest turnover are the least likely to have made a bid (4% vs. 12%-22%).

Companies whose clients are public administration are more likely to have made this kind of bid in the last two years than companies that sell to consumers or other companies (22% vs. 11% and 12% respectively).

**Q7** In the last two years, did your company bid for a public procurement tender that included environmental requirements?

| | Yes, successfully | Yes, unsuccessfully | Yes, but outcome is unknown | No | Don't know | Total 'Yes' |
|---|---|---|---|---|---|---|
| EU28 | 6 | 3 | 2 | 86 | 3 | 11 |
| **Turnover 2014** | | | | | | |
| 100,000 euros or less | 2 | 1 | 1 | 94 | 2 | 4 |
| More than 100-500,000 euros | 6 | 4 | 2 | 86 | 2 | 12 |
| More than 500,000 - 2 mil. euros | 7 | 4 | 2 | 85 | 2 | 13 |
| More than 2- 10 mil. euros | 8 | 5 | 5 | 80 | 2 | 18 |
| More than 10 mil. euros | 18 | 1 | 3 | 70 | 8 | 22 |
| **Clients** | | | | | | |
| Directly to consumers | 6 | 3 | 2 | 85 | 4 | 11 |
| Other companies | 7 | 3 | 2 | 85 | 3 | 12 |
| Public administration | 13 | 6 | 3 | 75 | 3 | 22 |

*Base: All SMEs (12,913)*

## Comparison between the EU and US

There are no notable differences between SMEs in the EU and the US.

## National analysis[47]

SMEs in Sweden (20%), Ireland (18%), Germany and France (both 17%) are the most likely to have bid on a public procurement tender with environmental requirements in the last two years. In contrast just 2% in Malta and 5% in Italy and Estonia have done the same.

Germany and Greece are the only Member States where at least one in ten SMEs have successfully bid on a public procurement tender with environmental requirements (14% and 10% respectively). No SMEs in Malta have bid successfully.

[47] Due to low base sizes, care should be taken when interpreting results for Albania (92), Montenegro (95) and Moldova (103).

**Q7** In the last two years, did your company bid for a public procurement tender that included environmental requirements? **(%)**

| | Yes, successfully | Yes, unsuccessfully | Yes, but outcome is unknown | No | Don't know | Total 'Yes' |
|---|---|---|---|---|---|---|
| EU28 | 6 | 3 | 2 | 86 | 3 | 11 |
| SE | 8 | 9 | 3 | 76 | 4 | 20 |
| IE | 8 | 4 | 6 | 74 | 8 | 18 |
| DE | 14 | 2 | 1 | 74 | 9 | 17 |
| FR | 8 | 5 | 4 | 82 | 1 | 17 |
| BE | 7 | 3 | 5 | 83 | 2 | 15 |
| CZ | 7 | 6 | 1 | 86 | 0 | 14 |
| DK | 8 | 4 | 2 | 85 | 1 | 14 |
| AT | 9 | 3 | 2 | 84 | 2 | 14 |
| LU | 6 | 3 | 4 | 85 | 2 | 13 |
| EL | 10 | 2 | 0 | 85 | 3 | 12 |
| HR | 6 | 4 | 1 | 85 | 4 | 11 |
| PL | 4 | 4 | 2 | 89 | 1 | 10 |
| CY | 4 | 2 | 3 | 90 | 1 | 9 |
| HU | 5 | 2 | 2 | 90 | 1 | 9 |
| SK | 4 | 2 | 3 | 89 | 2 | 9 |
| FI | 3 | 5 | 1 | 86 | 5 | 9 |
| ES | 5 | 1 | 2 | 92 | 0 | 8 |
| NL | 3 | 2 | 3 | 91 | 1 | 8 |
| RO | 6 | 2 | 0 | 92 | 0 | 8 |
| SI | 4 | 4 | 0 | 91 | 1 | 8 |
| BG | 3 | 3 | 1 | 91 | 2 | 7 |
| LT | 4 | 3 | 0 | 91 | 2 | 7 |
| PT | 3 | 3 | 1 | 93 | 0 | 7 |
| LV | 4 | 2 | 0 | 94 | 0 | 6 |
| UK | 3 | 1 | 2 | 73 | 21 | 6 |
| EE | 4 | 1 | 0 | 95 | 0 | 5 |
| IT | 3 | 2 | 0 | 94 | 1 | 5 |
| MT | 0 | 2 | 0 | 93 | 5 | 2 |
| ME | 13 | 1 | 5 | 81 | 0 | 19 |
| RS | 11 | 4 | 2 | 81 | 2 | 17 |
| AL | 7 | 4 | 2 | 82 | 5 | 13 |
| TR | 5 | 3 | 3 | 87 | 2 | 11 |
| MK | 4 | 1 | 1 | 91 | 3 | 6 |
| MD | 14 | 4 | 1 | 81 | 0 | 19 |
| IS | 8 | 5 | 1 | 83 | 3 | 14 |
| NO | 7 | 4 | 3 | 84 | 2 | 14 |
| US | 7 | 0 | 2 | 87 | 4 | 9 |

*Base: All SMEs (12,913)*

## Evolution since 2013

Between 2013 and 2015 there have been relatively minor changes in the proportion of companies bidding for public procurement tenders with environmental requirements. The most notable changes have been a decrease in the proportion of SMEs in Malta (-12 percentage points) and Sweden (-9 pp) that have bid on this kind of tender.

The situation is reversed amongst SMEs in Greece, Ireland and Germany, where there has been a seven, six and five percentage point increase respectively.

**Q7** In the last two years, did your company bid for a public procurement tender that included environmental requirements? **(%)**

| | Yes, successfully | Sept. 2015 - Sept. 2013 | Yes, unsuccessfully | Sept. 2015 - Sept. 2013 | Yes, but outcome is unknown | Sept. 2015 - Sept. 2013 | No | Sept. 2015 - Sept. 2013 | Don't know | Total 'Yes' | Sept. 2015 - Sept. 2013 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| EU28 | 6 | ▼1 | 3 | = | 2 | = | 86 | ▲1 | 3 | 11 | ▼1 |
| EL | 10 | ▲7 | 2 | ▲1 | 0 | ▼1 | 85 | ▼9 | 3 | 12 | ▲7 |
| IE | 8 | ▲1 | 4 | ▲2 | 6 | ▲3 | 74 | ▼9 | 8 | 18 | ▲6 |
| DE | 14 | ▲6 | 2 | ▼1 | 1 | = | 74 | ▼10 | 9 | 17 | ▲5 |
| PT | 3 | ▲1 | 3 | ▲3 | 1 | = | 93 | ▼3 | 0 | 7 | ▲4 |
| DK | 8 | = | 4 | ▲2 | 2 | ▲1 | 85 | ▲4 | 1 | 14 | ▲3 |
| BE | 7 | = | 3 | ▼1 | 5 | ▲3 | 83 | = | 2 | 15 | ▲2 |
| AT | 9 | ▼2 | 3 | ▲2 | 2 | ▲1 | 84 | ▼2 | 2 | 14 | ▲1 |
| ES | 5 | ▲1 | 1 | ▼1 | 2 | ▲1 | 92 | ▲2 | 0 | 8 | ▲1 |
| NL | 3 | = | 2 | ▼1 | 3 | ▲2 | 91 | ▼1 | 1 | 8 | ▲1 |
| EE | 4 | = | 1 | ▲1 | 0 | = | 95 | = | 0 | 5 | ▲1 |
| PL | 4 | ▼1 | 4 | ▲1 | 2 | = | 89 | ▲3 | 1 | 10 | = |
| BG | 3 | = | 3 | ▲1 | 1 | ▼1 | 91 | ▲4 | 2 | 7 | = |
| FR | 8 | ▼5 | 5 | ▲2 | 4 | ▲2 | 82 | ▲3 | 1 | 17 | ▼1 |
| CZ | 7 | ▼4 | 6 | ▲2 | 1 | ▲1 | 86 | ▲3 | 0 | 14 | ▼1 |
| RO | 6 | ▲1 | 2 | = | 0 | ▼2 | 92 | ▲2 | 0 | 8 | ▼1 |
| LU | 6 | = | 3 | ▼2 | 4 | = | 85 | ▲2 | 2 | 13 | ▼2 |
| LT | 4 | ▼1 | 3 | = | 0 | ▼1 | 91 | ▲1 | 2 | 7 | ▼2 |
| HR | 6 | ▼1 | 4 | ▼1 | 1 | ▼1 | 85 | ▲3 | 4 | 11 | ▼3 |
| CY | 4 | ▼3 | 2 | = | 3 | = | 90 | ▲4 | 1 | 9 | ▼3 |
| HU | 5 | ▼3 | 2 | ▼1 | 2 | ▲1 | 90 | ▲4 | 1 | 9 | ▼3 |
| LV | 4 | ▼2 | 2 | = | 0 | ▼1 | 94 | ▲5 | 0 | 6 | ▼3 |
| UK | 3 | ▼2 | 1 | ▼2 | 2 | = | 73 | ▼6 | 21 | 6 | ▼4 |
| IT | 3 | ▼2 | 2 | ▼1 | 0 | ▼1 | 94 | ▲5 | 1 | 5 | ▼4 |
| SK | 4 | ▼1 | 2 | ▼5 | 3 | ▲1 | 89 | ▲7 | 2 | 9 | ▼5 |
| FI | 3 | ▼5 | 5 | ▼2 | 1 | ▼1 | 86 | ▲6 | 5 | 9 | ▼8 |
| SI | 4 | ▼7 | 4 | = | 0 | ▼1 | 91 | ▲9 | 1 | 8 | ▼8 |
| SE | 8 | ▼11 | 9 | ▲1 | 3 | ▲1 | 76 | ▲7 | 4 | 20 | ▼9 |
| MT | 0 | ▼8 | 2 | ▼1 | 0 | ▼3 | 93 | ▲7 | 5 | 2 | ▼12 |
| AL | 7 | ▲1 | 4 | ▲3 | 2 | ▲2 | 82 | ▼10 | 5 | 13 | ▲6 |
| ME | 13 | ▲1 | 1 | ▼4 | 5 | ▲4 | 81 | ▲1 | 0 | 19 | ▲1 |
| RS | 11 | ▲4 | 4 | ▼1 | 2 | ▼2 | 81 | ▼2 | 2 | 17 | ▲1 |
| TR | 5 | ▼6 | 3 | ▲1 | 3 | ▲1 | 87 | ▲6 | 2 | 11 | ▼4 |
| MK | 4 | ▼2 | 1 | ▼4 | 1 | = | 91 | ▲3 | 3 | 6 | ▼6 |
| MD | 14 | NA* | 4 | NA* | 1 | NA* | 81 | NA* | 0 | 19 | NA* |
| IS | 8 | ▲1 | 5 | ▲2 | 1 | ▲1 | 83 | = | 3 | 14 | ▲4 |
| NO | 7 | ▲1 | 4 | ▼2 | 3 | ▲2 | 84 | ▲1 | 2 | 14 | ▲1 |
| US | 7 | ▲1 | 0 | ▼2 | 2 | ▼2 | 87 | ▲3 | 4 | 9 | ▼3 |

*Base: All SMEs (12,913)*

**Question not asked: this country was not included in the previous survey.*

## b. Difficulties when bidding among SMEs that have bid on a public procurement tender including environmental requirements

Amongst SMEs that have bid on a public procurement tender including environmental requirements, most did not experience any difficulties (78%), while one in five (20%) experienced difficulties[48].

There has been no notable change since 2013.

**Q8A** Did your company experience any difficulties when bidding for a public procurement tender that included environmental requirements?
**(% - EU)**

*(September 2015 - September 2013)*

*Base: Businesses that have bid successfully for a public procurement tender in the last two years = 1,343*

**Company breakdown**

A comparison with large companies was not possible due to low base size (27).

There are no notable difference between SMEs of different sizes in the proportions that experienced difficulties bidding on a tender with environmental requirements (17%-21%).

SMEs in the industry and services sector are more likely to report difficulties compared to those in manufacturing and retail (24% vs. 17%)[49].

[48] Q8a. Did your company experience any difficulties when bidding for a public procurement tender that included environmental requirements? Yes; No; DK/NA

[49] Care should be taken when interpreting the result for the services sector, due to low base size (147).

**Q8A** Did your company experience any difficulties when bidding for a public procurement tender that included environmental requirements?
**(% - EU)**

| | Yes | No | Don't know |
|---|---|---|---|
| EU28 | 20 | 78 | 2 |
| **Company size** | | | |
| 1-9 | 21 | 78 | 1 |
| 10-49 | 17 | 82 | 1 |
| 50-249 | 20 | 70 | 10 |
| **Sectors grouped (NACE)** | | | |
| Manufacturing (C) | 17 | 80 | 3 |
| Retail (G) | 17 | 82 | 1 |
| Services (I/J/K/H/L/M) | 24 | 72 | 4 |
| Industry (B/D/E/F) | 24 | 75 | 1 |

*Base: Businesses that have bid successfully for a public procurement tender in the last two years = 1,343*

National analysis could not be performed due to low base size.

## Types of difficulties experienced

Amongst SMEs that experienced difficulties in bidding for a public procurement tender with environmental requirements, the most common issue was that too much paperwork needed to be submitted (40%)[50]. Costs were a problem for 28%, while 10% had difficulties with the technical tests of the environmental performance or functionalities of their products or services.

Almost one in five encountered other difficulties (17%).

Costs are more likely to be mentioned as a difficulty than they were in 2013 (+9 percentage points).

[50] Q9. What was the most prominent difficulty that you faced when bidding for a public procurement tender with environmental requirements? Costs; Technical tests of the environmental performance or functionalities of your products or services; Too much paperwork to be submitted ; Other; DK/NA

**Q9** What was the most prominent difficulty that you faced when bidding for a public procurement tender with environmental requirements?
**(% - EU28)**

*Base: SMEs that experienced difficulties when bidding for a public procurement tender in the last two years = 267*

Due to low base sizes, an analysis based on company characteristics and the national analysis could not be performed.

### c. Reasons for not having bid among SMEs that have not bid on a public procurement tender including environmental requirements

SMEs that had not applied for a public procurement tender with environmental requirements were asked why they had not done so[51]. Just over half (51%) say they have never been confronted with such a tender. Almost one in five (19%) didn't even try to bid because they thought it would be too complicated, while 16% mentioned the fact that too much paperwork had to be submitted and 10% that the costs were too high. The complication or costs of technical tests were each mentioned by 8% of SMEs.

SMEs are more likely to mention too much paperwork as a reason not to bid, compared to 2013 (+7 percentage points), and there has been a five point increase in the proportion who did not even try to bid as they assumed it would be too complicated. There has been a slight decrease in the proportion that have never been confronted with such a tender (-4 pp).

**Q8B** Why did your company not apply for a public procurement tender that included environmental requirements? (MULTIPLE ANSWERS POSSIBLE)
**(% - EU28)**

*Base: SMEs that have not bid for a public procurement tender in the last two years = 11,124*

**Company breakdown**

Compared to SMEs, large companies are much less likely to mention any of these reasons for not bidding on a public procurement tender with environmental requirements[52]. For example, just 5% say they did not bid because they assumed it would be too complicated, compared to 19% of SMEs, and 3% mentioned too much paperwork, compared to 16% of SMEs. Large companies are also less likely to mention the fact that costs were too high (1% vs. 10%) or the costs of technical tests (1% vs. 8%).

[51] Why did your company not apply for a public procurement tender that included environmental requirements? You didn't even try to bid because you assumed it was too complicated; You have never been confronted with such a tender; The costs were too high; Too much paperwork to be submitted; Technical tests of the environmental performance or functionalities of your products or services were too complicated to obtain; The costs of the technical tests of the environmental performance or functionalities of your products or services were too high (N); Other (DO NOT READ OUT); DK/NA.

[52] Care should be taken when interpreting the results for large companies, due to low base size (101).

**Q8B** Why did your company not apply for a public procurement tender that included environmental requirements? (MULTIPLE ANSWERS POSSIBLE)
**(% - EU)**

| | You didn't even try to bid because you assumed it was too complicated | You have never been confronted with such a tender | The costs were too high | Too much paperwork to be submitted | Technical tests of the environmental performance or functionalities of your products or services were too complicated to obtain | The costs of the technical tests of the environmental performance or functionalities of your products or services were too high |
|---|---|---|---|---|---|---|
| **SMEs** | | | | | | |
| EU28 | 19 | 51 | 10 | 16 | 8 | 8 |
| **Large companies** | | | | | | |
| EU28 | 5 | 46 | 1 | 3 | 4 | 1 |

*Base: Companies that have not bid for a public procurement tender in the last two years = 11,270*

The smaller the SME, the more likely it is they didn't try and bid because they assumed it was too complicated, or because the costs were too high. For example, 20% of micro SMEs assumed it was too complicated to bid, compared to 17% of small SMEs and 13% of medium-sized SMEs. SMEs with less than 50 employees are more likely than medium-sized SMEs to say there would be too much paperwork to submit (16% vs 8%).

Amongst micro SMEs, solo operators are less likely than those with 2-9 employees to mention each of these reasons for not bidding on a public procurement tender that included environmental requirements. For example, 41% of SMEs with 2-9 employees did not try to bid because they assumed it would be too complicated, compared to 15% of solo operators.

SMEs in the services sector are the least likely to say they have never been confronted with this kind of tender (47% vs. 50%-53%), or that they didn't try to bid because they assumed it would be too complicated (14% vs. 18%-22%).

**Q8B** Why did your company not apply for a public procurement tender that included environmental requirements? (MULTIPLE ANSWERS POSSIBLE)
**(% - EU)**

| | You didn't even try to bid because you assumed it was too complicated | You have never been confronted with such a tender | The costs were too high | Too much paperwork to be submitted | Technical tests of the environmental performance or functionalities of your products or services were too complicated to obtain | The costs of the technical tests of the environmental performance or functionalities of your products or services were too high |
|---|---|---|---|---|---|---|
| EU28 | 19 | 51 | 10 | 16 | 8 | 8 |
| **Company size** | | | | | | |
| 1-9 | 20 | 51 | 11 | 16 | 9 | 8 |
| 10-49 | 17 | 53 | 8 | 16 | 6 | 6 |
| 50-249 | 13 | 51 | 5 | 8 | 5 | 5 |
| **Sectors grouped (NACE)** | | | | | | |
| Manufacturing (C) | 22 | 52 | 12 | 17 | 8 | 8 |
| Retail (G) | 18 | 53 | 9 | 14 | 8 | 8 |
| Services (I/J/K/H/L/M) | 14 | 47 | 8 | 12 | 6 | 6 |
| Industry (B/D/E/F) | 22 | 50 | 12 | 19 | 10 | 10 |
| **One person company** | | | | | | |
| Yes | 15 | 53 | 8 | 11 | 10 | 9 |
| No | 41 | 62 | 26 | 30 | 21 | 21 |

*Base: SMEs that have not bid for a public procurement tender in the last two years = 11,124*

SMEs with a turnover of up to 2 million euros in 2014 are more likely to say they didn't try to bid as they assumed it was too complicated, compared to SMEs with a higher turnover (20%-23% vs. 9%-15%).

**Q8B** Why did your company not apply for a public procurement tender that included environmental requirements? (MULTIPLE ANSWERS POSSIBLE)
**(% - EU)**

| | You didn't even try to bid because you assumed it was too complicated | You have never been confronted with such a tender | The costs were too high | Too much paperwork to be submitted | Technical tests of the environmental performance or functionalities of your products or services were too complicated to obtain | The costs of the technical tests of the environmental performance or functionalities of your products or services were too high |
|---|---|---|---|---|---|---|
| EU28 | 19 | 51 | 10 | 16 | 8 | 8 |
| **Turnover 2014** | | | | | | |
| 100,000 euros or less | 22 | 54 | 13 | 15 | 9 | 9 |
| More than 100-500,000 euros | 23 | 54 | 13 | 20 | 12 | 10 |
| More than 500,000 - 2 mil. euros | 20 | 51 | 9 | 17 | 6 | 7 |
| More than 2- 10 mil. euros | 15 | 52 | 8 | 16 | 6 | 9 |
| More than 10 mil. euros | 9 | 54 | 4 | 7 | 2 | 7 |
| **Company's turnover (past 2 years)** | | | | | | |
| Increased | 18 | 52 | 8 | 16 | 7 | 7 |
| Decreased | 22 | 52 | 14 | 19 | 10 | 11 |
| Remained unchanged | 19 | 52 | 10 | 15 | 8 | 7 |

*Base: SMEs that have not bid for a public procurement tender in the last two years = 11,124*

**Comparison between the EU and US**

Compared to SMEs in the EU, those in the US are more likely to mention each of these reasons for not bidding. The largest differences are observed for not bidding because there was too much paperwork (38% vs. 16%), the costs were too high (23% vs. 10%) they assumed it would be too complicated (29% vs. 19%), because the costs of the technical test were too high (18% vs. 8%).

**National analysis**

SMEs in each Member State are most likely to say they have not bid on a public procurement tender that included environmental requirements because they have **never been confronted with one**.

The exception is SMEs in Croatia, which are equally likely to say they didn't apply because they assumed it would be too complicated (both 23%). SMEs in Finland (79%), the Netherlands (75%) and Sweden (73%) are the most likely to say they have never been confronted with such a tender, while those in Slovenia (20%) and Croatia (23%) are least likely to do so.

SMEs in France (38%), Slovenia (33%), Belgium and Poland (both 32%) are the most likely to say they didn't try to bid because they **assumed it was too complicated**. Just 6% of SMEs in the Netherlands and Estonia say the same. At least one quarter of SMEs in France (45%), Belgium (34%) and Poland (26%) say there was **too much paperwork to be submitted**, compared to 1% in Malta and 2% in Italy and Estonia.

One in five SMEs in France (25%), Belgium (22%) and Poland (21%) say the **costs were too high**, compared to 1% in Italy and 2% in Estonia. SMEs in France are also the most likely to say the **technical tests of the environmental performance or functionalities of their products or services were too complicated to obtain** (22%) followed by 19% of SMEs in Belgium and Portugal. No SMEs in Cyprus or Italy and almost no SMEs in Lithuania mention this reason.

SMEs in France (23%), Belgium (21%), Portugal and Poland (both 16%) are the most likely to say the **costs of the technical tests of the environmental performance or functionalities of their products or services were too high**. No SMEs in Cyprus, Malta or Italy mention this reason.

Looking across all countries studied shows that SMES in Turkey are frequently either the most likely, or amongst the most likely to mention each reason. For example 47% of SMEs in Turkey say they didn't try to bid because they assumed it was too complicated – higher than SMEs in France (38%)[53].

SMEs in France are also much more likely than they were in 2013 to say there is too much paperwork to be submitted (+41 pp), and SMEs in Sweden (+13 pp) and Poland (+11 pp) are also more likely to mention this reason. SMEs in Romania, on the other hand, are less likely to do so than they were in 2013 (-8 pp).

SMEs in France are also more likely to mention costs being too high (+23 pp) and technical tests being too complicated to obtain (+21 pp) compared to 2013.

Including non-EU countries in the analysis, SMEs in Turkey, on the other hand, had the second largest increase (+19 pp) of those that didn't bid because they assumed it would be too complicated, after that observed in France.

[53] Due to low base sizes, care should be taken when interpreting results for Albania (76), Montenegro (76) and Moldova (83).

**Q8B** Why did your company not apply for a public procurement tender that included environmental requirements? (MULTIPLE ANSWERS POSSIBLE) **(%)**

| | You have never been confronted with such a tender | You didn't even try to bid because you assumed it was too complicated | Too much paperwork to be submitted | The costs were too high | Technical tests of the environmental performance or functionalities of your products or services were too complicated to obtain | The costs of the technical tests of the environmental performance or functionalities of your products or services were too high |
|---|---|---|---|---|---|---|
| EU28 | 51 | 19 | 16 | 10 | 8 | 8 |
| BE | **63** | 32 | 34 | 22 | *19* | 21 |
| BG | **47** | 10 | 5 | 7 | 3 | *2* |
| CZ | **45** | 23 | 10 | 8 | 9 | *4* |
| DK | **65** | 8 | 5 | 7 | 5 | *2* |
| DE | **37** | 9 | 8 | 8 | *4* | *4* |
| EE | **54** | 6 | 2 | 2 | 2 | *1* |
| IE | **65** | 14 | 16 | 13 | *8* | *8* |
| EL | **46** | 13 | 17 | 8 | *7* | 9 |
| ES | **59** | 16 | 11 | 7 | *4* | 7 |
| FR | **64** | 38 | 45 | 25 | *22* | 23 |
| HR | **23** | **23** | 18 | 7 | 6 | *4* |
| IT | **40** | 7 | 2 | 1 | *0* | *0* |
| CY | **41** | 14 | 4 | 8 | *0* | *0* |
| LV | **61** | 22 | 11 | *8* | *8* | *8* |
| LT | **53** | 14 | 5 | 5 | *0* | 1 |
| LU | **69** | 11 | 10 | 9 | *1* | 5 |
| HU | **32** | 17 | 11 | 7 | *2* | *2* |
| MT | **61** | 9 | 1 | 3 | 2 | *0* |
| NL | **75** | 6 | 5 | *3* | 4 | *3* |
| AT | **40** | 11 | 7 | *3* | 5 | 5 |
| PL | **47** | 32 | 26 | 21 | *16* | *16* |
| PT | **69** | 28 | 24 | 17 | 19 | *16* |
| RO | **46** | 17 | 8 | 6 | 6 | *2* |
| SI | 20 | **33** | 13 | 10 | 12 | *4* |
| SK | **40** | 24 | 18 | 7 | 7 | *5* |
| FI | **79** | 12 | 11 | *6* | 8 | 7 |
| SE | **73** | 17 | 18 | 14 | 11 | *10* |
| UK | **55** | 28 | 23 | 14 | 10 | *9* |
| AL | 7 | 7 | 5 | 9 | 0 | 0 |
| MK | 39 | 14 | 3 | 4 | 5 | 0 |
| ME | 62 | 11 | 3 | 4 | 0 | 0 |
| RS | 43 | 24 | 8 | 4 | 5 | 2 |
| TR | 61 | 47 | 34 | 33 | 36 | 34 |
| IS | 65 | 11 | 8 | 10 | 7 | 9 |
| MD | 55 | 26 | 8 | 13 | 0 | 11 |
| NO | 58 | 3 | 2 | 5 | 3 | 0 |
| US | 56 | 29 | 38 | 23 | 14 | 18 |

**Highest percentage per country** — *Lowest percentage per country*

Highest percentage per item — Lowest percentage per item

*Base: SMEs that have not bid for a public procurement tender in the last two years = 11,124*

## Evolution since 2013

SMEs in Luxembourg are much more likely to say they have never been confronted with a public procurement tender that included environmental requirements than they were in 2013 (+22 percentage points), as are those in Denmark (+17 pp) and Ireland (+14 p). In contrast, SMEs in Cyprus (-21 pp), the UK, Greece and Germany are less likely to say this (all -15 pp).

SMEs in France are much more likely than they were in 2013 to say they didn't bid as they assumed it was too complicated (+28 pp), and SMEs in Sweden (+13 pp) and Belgium (+11 pp) are also more likely to say this. The reverse is true for SMEs in Greece (-8 pp).

**Q8B** Why did your company not apply for a public procurement tender that included environmental requirements? (MULTIPLE ANSWERS POSSIBLE) **(%)**

| | You have never been confronted with such a tender | Sept 2015 - Sept 2013 | You didn't even try to bid because you assumed it was too complicated | Sept 2015 - Sept 2013 | Too much paperwork to be submitted | Sept 2015 - Sept 2013 | The costs were too high | Sept 2015 - Sept 2013 | Technical tests of the environmental performance or functionalities of your products or services were too complicated to obtain | Sept 2015 - Sept 2013 | The costs of the technical tests of the environmental performance or functionalities of your products or services were too high* |
|---|---|---|---|---|---|---|---|---|---|---|---|
| EU28 | 51 | ▼ 4 | 19 | ▲ 5 | 16 | ▲ 7 | 10 | ▲ 2 | 8 | ▲ 2 | 8 |
| BE | 63 | ▼ 4 | 32 | ▲ 11 | 34 | ▲ 9 | 22 | ▲ 5 | 19 | ▲ 4 | 21 |
| BG | 47 | ▼ 7 | 10 | ▲ 7 | 5 | ▲ 1 | 7 | ▲ 5 | 3 | ▲ 3 | 2 |
| CZ | 45 | ▲ 3 | 23 | ▼ 1 | 10 | ▼ 3 | 8 | ▼ 1 | 9 | ▼ 1 | 4 |
| DK | 65 | ▲ 17 | 8 | ▲ 2 | 5 | ▲ 2 | 7 | = | 5 | ▲ 2 | 2 |
| DE | 37 | ▼ 15 | 9 | ▼ 1 | 8 | ▲ 1 | 8 | ▲ 1 | 4 | ▼ 5 | 4 |
| EE | 54 | ▼ 11 | 6 | ▲ 2 | 2 | = | 2 | ▼ 1 | 2 | ▲ 1 | 1 |
| IE | 65 | ▲ 14 | 14 | ▲ 1 | 16 | ▲ 7 | 13 | ▲ 2 | 8 | ▲ 2 | 8 |
| EL | 46 | ▼ 15 | 13 | ▼ 8 | 17 | ▲ 1 | 8 | = | 7 | ▼ 2 | 9 |
| ES | 59 | ▲ 6 | 16 | = | 11 | ▲ 1 | 7 | ▼ 1 | 4 | ▼ 3 | 7 |
| FR | 64 | ▲ 4 | 38 | ▲ 28 | 45 | ▲ 41 | 25 | ▲ 23 | 22 | ▲ 21 | 23 |
| HR | 23 | ▼ 9 | 23 | ▲ 8 | 18 | ▲ 3 | 7 | ▼ 1 | 6 | ▼ 1 | 4 |
| IT | 40 | ▼ 4 | 7 | ▼ 4 | 2 | ▼ 1 | 1 | ▼ 5 | 0 | ▼ 3 | 0 |
| CY | 41 | ▼ 21 | 14 | ▲ 1 | 4 | ▲ 3 | 8 | ▲ 7 | 0 | ▼ 3 | 0 |
| LV | 61 | ▼ 5 | 22 | ▲ 5 | 11 | = | 8 | ▲ 3 | 8 | ▲ 2 | 8 |
| LT | 53 | ▼ 10 | 14 | ▲ 8 | 5 | = | 5 | ▲ 4 | 0 | ▼ 2 | 1 |
| LU | 69 | ▲ 22 | 11 | = | 10 | ▲ 3 | 9 | ▲ 2 | 1 | ▼ 2 | 5 |
| HU | 32 | ▼ 8 | 17 | ▲ 4 | 11 | ▲ 4 | 7 | ▼ 4 | 2 | ▼ 1 | 2 |
| MT | 61 | ▲ 10 | 9 | ▼ 2 | 1 | = | 3 | ▲ 2 | 2 | ▼ 2 | 0 |
| NL | 75 | ▼ 5 | 6 | ▲ 2 | 5 | ▲ 1 | 3 | = | 4 | ▲ 1 | 3 |
| AT | 40 | ▼ 8 | 11 | ▲ 6 | 7 | ▲ 5 | 3 | = | 5 | ▲ 1 | 5 |
| PL | 47 | ▼ 8 | 32 | ▲ 8 | 26 | ▲ 11 | 21 | ▲ 11 | 16 | ▲ 8 | 16 |
| PT | 69 | ▲ 3 | 28 | ▲ 8 | 24 | ▲ 10 | 17 | ▲ 1 | 19 | ▲ 9 | 16 |
| RO | 46 | ▼ 10 | 17 | ▲ 1 | 8 | ▼ 8 | 6 | ▼ 5 | 6 | ▲ 1 | 2 |
| SI | 20 | ▼ 10 | 33 | ▲ 5 | 13 | ▼ 1 | 10 | ▼ 2 | 12 | ▼ 3 | 4 |
| SK | 40 | ▲ 1 | 24 | ▲ 5 | 18 | ▼ 4 | 7 | ▼ 9 | 7 | ▼ 5 | 5 |
| FI | 79 | ▼ 4 | 12 | ▲ 3 | 11 | ▲ 8 | 6 | ▲ 2 | 8 | ▲ 3 | 7 |
| SE | 73 | ▼ 4 | 17 | ▲ 13 | 18 | ▲ 13 | 14 | ▲ 11 | 11 | ▲ 9 | 10 |
| UK | 55 | ▼ 15 | 28 | ▲ 7 | 23 | ▲ 8 | 14 | ▲ 1 | 10 | ▼ 3 | 9 |
| AL | 7 | ▼ 42 | 7 | ▼ 20 | 5 | ▼ 16 | 9 | ▼ 20 | 0 | ▼ 1 | 0 |
| MK | 39 | ▼ 19 | 14 | ▲ 5 | 3 | ▲ 2 | 4 | = | 5 | ▲ 4 | 0 |
| ME | 62 | ▲ 11 | 11 | ▼ 12 | 3 | ▼ 11 | 4 | ▲ 3 | 0 | ▼ 5 | 0 |
| RS | 43 | ▼ 14 | 24 | ▲ 5 | 8 | ▲ 3 | 4 | ▲ 3 | 5 | ▲ 4 | 2 |
| TR | 61 | ▼ 13 | 47 | ▲ 19 | 34 | ▲ 18 | 33 | ▲ 9 | 36 | ▲ 15 | 34 |
| IS | 65 | ▼ 7 | 11 | = | 8 | = | 10 | ▲ 2 | 7 | ▲ 2 | 9 |
| MD | 55 | NA** | 26 | NA** | 8 | NA** | 13 | NA** | 0 | NA** | 11 |
| NO | 58 | ▼ 24 | 3 | = | 2 | ▼ 6 | 5 | ▲ 2 | 3 | ▲ 3 | 0 |
| US | 56 | ▼ 13 | 29 | ▲ 4 | 38 | ▲ 9 | 23 | ▲ 3 | 14 | ▼ 1 | 18 |

*Base: SMEs that have not bid for a public procurement tender in the last two years = 11,124*

**New item*

***Question not asked: this country was not included in the previous survey.*

## II. GREEN PRODUCTS AND SERVICES AND SMES: REDUCING ENVIRONMENTAL RISK, MINIMISING POLLUTION AND THE USE OF RESOURCES

The second section of this report focuses on the green products and services offered by SMEs. The proportion of SMEs currently offering green products or services will be discussed, as well as the length of time since when SMEs are offering them. The proportion of turnover that green products or services represent for these SMEs will also be discussed, as well as the major markets they sold to.

The report continues with a review of the kinds of support SMEs receive for launching or expanding their green products or services, and of their satisfaction with this support. At the same time, the report will discuss the opinions of SMEs on the type of support that would most help them launch or expand a range of green products or services.

Finally, a broad estimation of the number of green jobs[54] in European SMEs will be presented.

# 1 Green markets and profiles of SMEs offering green products or services

## a. General overview

**– More than one quarter of SMEs currently offer green products or services –**

Across EU28, at least one third of all SMEs either currently offer green products or services (26%), or are planning to do so in the next two years (7%).

The majority, however, do not currently offer green products or services, and have no plans to do so (60%).

There has been no notable change in these proportions since 2013.

[54] A "green job" was defined in this survey as a job that directly deals with information, technologies, or materials that preserves or restores environmental quality. This requires specialised skills, knowledge, training, or experience (e.g. verifying compliance with environmental legislation, monitoring resource efficiency within the company, promoting and selling green products and services).

**Q14** Does your company offer green products or services?
**(% – EU)**

*(September 2015 - September 2013)*

*Base: All SMEs (12,913)*

## Company breakdown

Compared to SMEs, large companies are more likely to currently offer green products or services (33% vs. 26%). SMEs, on the other hand, are more likely to say they do not offer green products and services, and are not planning to do so (60% vs. 54%)[55].

**Q14** Does your company offer green products or services?
**(% - EU)**

| | Yes | No but you are planning to do so in the next 2 years | No and you are not planning to do so | Don't know | Total 'No' |
|---|---|---|---|---|---|
| **SMEs** | | | | | |
| EU28 | 26 | 7 | 60 | 7 | 67 |
| **Large companies** | | | | | |
| EU28 | 33 | 4 | 54 | 9 | 58 |

*Base: All companies (13,114)*

The largest SMEs are the most likely to currently offer green products or services (32% vs. 25%-26%). There is no difference based on SME size in the proportions with plans to offer green products or services in the next two years.

Looking specifically at micro SMEs, solo operators are more likely than those with 2-9 employees to be currently offering green products or services (25% vs. 17%). Consistently, micro SMEs with 2-9

[55] Care should be taken when interpreting the results for large companies, due to low base size (146).

employees are more likely than solo SMEs to say they have no plans to offer green products or services (70% vs. 56%).

Retail sector SMEs are the most likely to be currently offering green products or services, particularly compared to SMEs in the service sector (29% vs. 20%).

**Q14** Does your company offer green products or services?
**(% - EU)**

| | Yes | No but you are planning to do so in the next 2 years | No and you are not planning to do so | Don't know | Total 'No' |
|---|---|---|---|---|---|
| EU28 | 26 | 7 | 60 | 7 | 67 |
| **Company size** | | | | | |
| 1-9 | 26 | 7 | 60 | 7 | 67 |
| 10-49 | 25 | 6 | 62 | 7 | 68 |
| 50-249 | 32 | 7 | 56 | 5 | 63 |
| **Sectors grouped (NACE)** | | | | | |
| Manufacturing (C) | 24 | 6 | 62 | 8 | 68 |
| Retail (G) | 29 | 8 | 57 | 6 | 65 |
| Services (I/J/K/H/L/M) | 20 | 7 | 66 | 7 | 73 |
| Industry (B/D/E/F) | 25 | 8 | 60 | 7 | 68 |
| **One person company** | | | | | |
| Yes | 25 | 10 | 56 | 9 | 66 |
| No | 17 | 10 | 70 | 3 | 80 |

*Base: All SMEs (12,913)*

SMEs with a turnover of more than ten million euros are the most likely to say they currently offer green products or services (33% vs. 26%-28%).

SMEs that sell to other companies are more likely to say they are not planning to offer green products or services, compared to companies that sell to consumers or to public administration (61% vs. 56% and 55% respectively).

SMEs that are taking many resource efficiency actions are the most likely to say they offer green products or services (35%): for instance, only sixteen percent of SMEs taking no resource efficiency actions say they offer green products or services. In addition, the more resource efficiency actions an SME takes, the less likely it is to say it is not planning to offer green products or services: 74% of those taking no action say this, compared to 47% of SMEs taking many actions.

**Q14** Does your company offer green products or services?
**(% - EU)**

| | Yes | No but you are planning to do so in the next 2 years | No and you are not planning to do so | Don't know | Total 'No' |
|---|---|---|---|---|---|
| EU28 | 26 | 7 | 60 | 7 | 67 |
| **Turnover 2014** | | | | | |
| 100,000 euros or less | 26 | 8 | 59 | 7 | 67 |
| More than 100-500,000 euros | 28 | 8 | 59 | 5 | 67 |
| More than 500,000 - 2 mil. euros | 27 | 9 | 60 | 4 | 69 |
| More than 2- 10 mil. euros | 28 | 6 | 62 | 4 | 68 |
| More than 10 mil. euros | 33 | 3 | 56 | 8 | 59 |
| **Clients** | | | | | |
| Directly to consumers | 29 | 8 | 56 | 7 | 64 |
| Other companies | 26 | 7 | 61 | 6 | 68 |
| Public administration | 32 | 7 | 55 | 6 | 62 |
| **Actions undertaken** | | | | | |
| Many actions | 35 | 10 | 47 | 8 | 57 |
| Some actions | 25 | 7 | 61 | 7 | 68 |
| Few actions | 22 | 5 | 68 | 5 | 73 |
| No action | 16 | 4 | 74 | 6 | 78 |

*Base: All SMEs (12,913)*

## Comparison between the EU and US

There is little difference between SMEs in EU28 and the US, with those in the US only slightly more likely to be offering green products or services (30% vs. 26%).

## National analysis

In 24 Member States at least one in five SMEs currently offer green products or services. SMEs in Luxembourg are the most likely to be doing so (48%), followed by those in Austria (43%), Sweden (38%) and Ireland (37%). The exceptions are SMEs in Bulgaria (13%), Italy (15%), Latvia (17%) and Hungary (18%).

SMEs in France, Greece, Portugal and Croatia (all 12%) are the most likely to say they are planning to offer green products or services in the next two years. Just 2% of SMEs in Estonia say the same. SMEs in Italy (80%), Hungary (72%), Latvia and Malta (both 71%) are the most likely to say they have no plans to offer green products or services.

Looking across EU and non-EU countries, SMEs in Norway (42%) are the second most likely, after those in Luxembourg, to be currently offering green products or services, while those in Iceland are as likely as those in Sweden to be doing so (both 38%). Companies in Turkey are the most likely across all countries to say they are planning to offer green products or services in the next two years (15%). Finally, SMEs in Serbia (76%), is the second most likely, after those in Italy, to say they have no plans to offer green products or services[56].

*Base: All SMEs (12,913)*

### Evolution since 2013

Comparing the results from this survey to those of 2013 shows the largest increases in the proportion of SMEs offering green products or services has occurred amongst SMEs in Luxembourg (+14 percentage points), Finland (+12 pp), Hungary and Spain (both +8 pp). Conversely, the largest decreases are observed amongst SMEs in Italy (-10 pp) and Malta (-6 pp).

Changes in the proportion of SMEs planning to offer green products and services in the next two years are generally small. The exceptions are amongst SMEs in France, where there has been a seven point increase, and amongst those in Romania and Finland, where there has been five point decrease.

[56] Due to low base sizes, care should be taken when interpreting results for Albania (92), Montenegro (95) and Moldova (105).

SMEs in Italy (+20 pp) and Malta (+12 pp) are more likely to say they have no plans to offer green products or services than they were in 2013. In contrast, SMEs in Luxembourg (-13 pp), Hungary (-10 pp), Portugal and Spain (both -8 pp) are now less likely to say they have no plans to offer green products or services.

Broadening the analysis to include non-EU countries shows SMEs in Norway (+12 pp)) have the second highest increase in the proportion of SMEs offering green products or services. SMEs in Macedonia have the largest increase in the proportion planning to offer green products or services (+16 pp), and the largest decrease in the proportion that are not planning on offering green products or services (-37 pp).

**Q14** Does your company offer green products or services? **(%)**

| | Yes | Sept 2015 - Sept 2013 | No but you are planning to do so in the next 2 years | Sept 2015 - Sept 2013 | No and you are not planning to do so | Sept 2015 - Sept 2013 | Don't know | Total 'No' | Sept 2015 - Sept 2013 |
|---|---|---|---|---|---|---|---|---|---|
| EU28 | 26 | = | 7 | = | 60 | ▲ 1 | 7 | 67 | ▲ 1 |
| LU | 48 | ▲ 14 | 9 | ▲ 2 | 40 | ▼ 13 | 3 | 49 | ▼ 11 |
| AT | 43 | = | 6 | ▲ 2 | 49 | = | 2 | 55 | ▲ 2 |
| SE | 38 | ▲ 1 | 3 | ▼ 1 | 54 | = | 5 | 57 | ▼ 1 |
| IE | 37 | ▲ 3 | 5 | ▼ 4 | 48 | ▼ 2 | 10 | 53 | ▼ 6 |
| FI | 36 | ▲ 12 | 3 | ▼ 5 | 58 | ▼ 2 | 3 | 61 | ▼ 7 |
| FR | 34 | ▲ 4 | 12 | ▲ 7 | 52 | ▼ 7 | 2 | 64 | = |
| SK | 34 | ▲ 2 | 6 | ▼ 2 | 58 | ▲ 2 | 2 | 64 | = |
| SI | 33 | ▼ 4 | 5 | ▼ 1 | 58 | ▲ 2 | 4 | 63 | ▲ 1 |
| DK | 32 | ▲ 5 | 6 | ▲ 4 | 60 | ▼ 7 | 2 | 66 | ▼ 3 |
| CY | 32 | ▲ 7 | 7 | ▼ 1 | 61 | ▼ 3 | 0 | 68 | ▼ 4 |
| DE | 31 | ▼ 2 | 3 | = | 57 | ▼ 3 | 9 | 60 | ▼ 3 |
| EL | 30 | ▲ 7 | 12 | ▼ 3 | 56 | ▼ 4 | 2 | 68 | ▼ 7 |
| LT | 29 | ▲ 2 | 7 | ▲ 1 | 56 | ▼ 6 | 8 | 63 | ▼ 5 |
| ES | 29 | ▲ 8 | 9 | ▲ 2 | 57 | ▼ 8 | 5 | 66 | ▼ 6 |
| PL | 28 | ▲ 2 | 10 | ▼ 2 | 54 | ▲ 1 | 8 | 64 | ▼ 1 |
| NL | 27 | = | 5 | = | 62 | = | 6 | 67 | = |
| UK | 26 | ▼ 5 | 9 | ▲ 2 | 41 | ▼ 5 | 24 | 50 | ▼ 3 |
| PT | 26 | ▲ 1 | 12 | ▼ 1 | 41 | ▼ 8 | 21 | 53 | ▼ 9 |
| RO | 26 | ▲ 4 | 11 | ▼ 5 | 58 | ▲ 9 | 5 | 69 | ▲ 4 |
| BE | 24 | ▼ 4 | 10 | ▼ 1 | 61 | ▲ 8 | 5 | 71 | ▲ 7 |
| EE | 24 | ▲ 5 | 2 | ▲ 1 | 70 | ▼ 4 | 4 | 72 | ▼ 3 |
| HR | 23 | ▼ 3 | 12 | ▼ 1 | 58 | ▲ 4 | 7 | 70 | ▲ 3 |
| MT | 23 | ▼ 6 | 4 | ▼ 3 | 71 | ▲ 12 | 2 | 75 | ▲ 9 |
| CZ | 22 | = | 6 | ▲ 2 | 67 | ▲ 2 | 5 | 73 | ▲ 4 |
| HU | 18 | ▲ 8 | 5 | = | 72 | ▼ 10 | 5 | 77 | ▼ 10 |
| LV | 17 | ▼ 2 | 8 | ▲ 1 | 71 | ▲ 1 | 4 | 79 | ▲ 2 |
| IT | 15 | ▼ 10 | 3 | ▼ 4 | 80 | ▲ 20 | 2 | 83 | ▲ 16 |
| BG | 13 | ▲ 2 | 8 | ▲ 2 | 67 | ▼ 1 | 12 | 75 | ▲ 1 |
| AL | 20 | ▲ 11 | 4 | = | 53 | ▼ 30 | 23 | 57 | ▼ 30 |
| TR | 18 | ▲ 4 | 15 | ▼ 8 | 60 | ▲ 4 | 7 | 75 | ▼ 4 |
| ME | 18 | ▼ 22 | 5 | ▼ 16 | 77 | ▲ 38 | 0 | 82 | ▲ 22 |
| RS | 14 | ▼ 7 | 9 | = | 76 | ▲ 7 | 1 | 85 | ▲ 7 |
| MK | 12 | ▼ 4 | 18 | ▲ 16 | 43 | ▼ 37 | 27 | 61 | ▼ 21 |
| NO | 42 | ▲ 12 | 2 | ▼ 3 | 52 | ▼ 9 | 4 | 54 | ▼ 12 |
| IS | 38 | ▲ 6 | 10 | ▲ 2 | 45 | ▲ 2 | 7 | 55 | ▲ 4 |
| MD | 35 | NA* | 11 | NA* | 53 | NA* | 1 | 64 | NA* |
| US | 30 | ▼ 4 | 9 | ▼ 3 | 55 | ▲ 6 | 6 | 64 | ▲ 3 |

*Base: All SMEs (12,913)*

**Question not asked: this country was not included in the previous survey.*

## b. Proportion of SMEs' turnover generated by green products or services

For SMEs that currently sell green products or services, these make up a relatively small proportion of their most recent annual turnover[57]. For 39%, green products or services represent no more than 5% of their annual turnover, while for a further 12% these products or services represented 6-10% turnover. Twelve percent of SMEs say green products or services represented 11-30% of turnover, while 6% say they accounted for 31%-50% of turnover and 5% say green products or services represented 51%-75% of turnover.

More than one in ten (13%) say green products or services accounted for more than 75% of their most recent annual turnover.

There have been relatively small changes since 2013. The exception is a five percentage point increase in the proportion of SMEs who say up to 5% of turnover was from green products or services.

**Q15** How much did these green products or services represent in your annual turnover of the latest available fiscal year?
**(% - EU28)**

*Base: SMEs that offer green products or services = 3,392*

**Company breakdown**

A comparison of SMEs with large companies was not possible, due to low base size (48).

Micro SMEs that sell green products or services are the most likely to say that up to 5% of turnover comes from the sale of these products or services (41% vs. 29%-30%)[58]. SMEs with fewer than 50 employees are the least likely to say 6-10% of turnover comes from green products or services (12-14% vs. 25%), but they are the most likely to say 11-30% (12%-15% vs. 4%), or more than 75% of turnover comes from green products or services (13%-16% vs. 6%).

[57] Q15. How much did these green products or services represent in your annual turnover of the latest available fiscal year? (M) Up to 5% (M); 6-10% (M); 11-30% (M); 31-50% (M); 51-75% (M); More than 75% (M); DK/NA

[58] Care should be taken when interpreting the results for large SMEs, due to low base size (112).

SMEs in the manufacturing and retail sectors are the most likely to say that up to 5% of turnover comes from green products or services (40% and 41% vs. 30%-33%), but manufacturing SMEs are the least likely to say 6%-10% of turnover comes from these products or services (6% vs. 12%-16%). Retail SMEs are less likely than those in other sectors to say more than 75% of turnover comes from green products or services (9% vs. 16%-19%).

**Q15** How much did these green products or services represent in your annual turnover of the latest available fiscal year?

| | Up to 5% | 6-10% | 11-30% | 31-50% | 51-75% | More than 75% | Don't know |
|---|---|---|---|---|---|---|---|
| EU28 | 39 | 12 | 12 | 6 | 5 | 13 | 13 |
| **Company size** | | | | | | | |
| 1-9 | 41 | 12 | 12 | 5 | 5 | 13 | 12 |
| 10-49 | 29 | 14 | 15 | 10 | 3 | 16 | 13 |
| 50-249 | 30 | 25 | 4 | 6 | 2 | 6 | 27 |
| **Sectors grouped (NACE)** | | | | | | | |
| Manufacturing (C) | 40 | 6 | 12 | 8 | 5 | 19 | 10 |
| Retail (G) | 41 | 15 | 12 | 4 | 6 | 9 | 13 |
| Services (I/J/K/H/L/M) | 30 | 16 | 13 | 5 | 3 | 16 | 17 |
| Industry (B/D/E/F) | 33 | 12 | 14 | 7 | 3 | 17 | 14 |

*Base: SMEs that offer green products or services = 3,392*

SMEs whose turnover has decreased in the past two years are more likely to say up to 5% of turnover came from green products or services, compared to those whose turnover has increased (37%) or remained the same (36%).

SMEs whose turnover has increased or remained the same are more likely than those whose turnover has decreased to say more than 75% of turnover came from green products or services (15% vs. 10%).

**Q15** How much did these green products or services represent in your annual turnover of the latest available fiscal year?

| | Up to 5% | 6-10% | 11-30% | 31-50% | 51-75% | More than 75% | Don't know |
|---|---|---|---|---|---|---|---|
| EU28 | 39 | 12 | 12 | 6 | 5 | 13 | 13 |
| **Turnover 2014** | | | | | | | |
| 100,000 euros or less | 44 | 14 | 7 | 6 | 5 | 15 | 9 |
| More than 100-500,000 euros | 39 | 13 | 15 | 7 | 5 | 14 | 7 |
| More than 500,000 - 2 mil. euros | 42 | 9 | 17 | 2 | 7 | 14 | 9 |
| More than 2- 10 mil. euros | 34 | 16 | 11 | 12 | 9 | 15 | 3 |
| More than 10 mil. euros | 32 | 11 | 15 | 16 | 2 | 12 | 12 |
| **Company's turnover (past 2 years)** | | | | | | | |
| Increased | 37 | 14 | 12 | 4 | 8 | 15 | 10 |
| Decreased | 43 | 14 | 9 | 6 | 3 | 10 | 15 |
| Remained unchanged | 36 | 11 | 17 | 7 | 4 | 15 | 10 |

*Base: SMEs that offer green products or services = 3,392*

**Comparison between the EU and US**

SMEs in the US are more likely to report a higher turnover from green products or services than their EU counterparts: 69% report a green products or services represented at least 6% of turnover, compared to 48% of SMEs in the EU[59]. Most of the difference is in the lower end of the range: 39% of EU SMEs say up to 5% of their turnover was from green products or services, compared to 26% of US SMEs.

However, 26% of US SMEs say 6-10% of turnover came from green products or services, compared to 12% of those in the EU.

**National analysis**

It was not possible to perform a national analysis due to low base sizes.

[59] Care should be taken when interpreting the results for the US, due to low base size (115).

## c. Length of time since when SMEs are offering green products or services

Most SMEs that sell green products or services have been doing so for more than three years (69%)[60]. One in five (20%) have been selling them for one to three years, while 8% have been selling green products or services for less than one year. There have only been minor changes since 2013. The proportion of SMEs that have been selling green products or services for less than one year has increased two percentage points, while the proportion selling them for between one and three years has decreased by three points.

**Q16** For how long has your company been selling green products or services?
**(% - EU)**

*(September 2015 - September 2013)*

*Base: SMEs that offer green products or services = 3,392*

**Company breakdown**

A comparison with large companies was not possible, due to low base size (48).

Micro SMEs are the most likely to have been offering green products or services for less than one year (9% vs. 3%-4%), and the least likely to have been offering these products or services for more than three years (67% vs. 72%-76%)[61].

Industry sector SMEs are slightly more likely than those in other sectors to have been offering green products or services for less than one year (12% vs. 7%-8%).

[60] Q16. For how long has your company been selling green products or services? Less than 1 year; Between 1 and 3 years; More than 3 years; DK/NA

[61] Care should be taken when interpreting the results for large SMEs, due to low base size (112).

**Q16** For how long has your company been selling green products or services?
**(% - EU)**

| | Less than one year | Between 1 and 3 years | More than 3 years | Don't know |
|---|---|---|---|---|
| EU28 | 8 | 20 | 69 | 3 |
| **Company size** | | | | |
| 1-9 | 9 | 21 | 67 | 3 |
| 10-49 | 4 | 18 | 76 | 2 |
| 50-249 | 3 | 20 | 72 | 5 |
| **Sectors grouped (NACE)** | | | | |
| Manufacturing (C) | 7 | 18 | 71 | 4 |
| Retail (G) | 8 | 21 | 69 | 2 |
| Services (I/J/K/H/L/M) | 7 | 23 | 68 | 2 |
| Industry (B/D/E/F) | 12 | 19 | 66 | 3 |

*Base: SMEs that offer green products or services = 3,392*

SMEs with the lowest turnover are the most likely to have been offering green products or services for less than one year (13% vs. 2%-6%)[62].

SMEs whose turnover has increased in the last two years are less likely to have been selling these products or services for less than one year (5% vs. 11%).

SMEs that only sell to consumers are the most likely to have been selling green products or services for less than one year (13% vs. 1%-7%), and the least likely to have been selling them for 1-3 years (17% vs. 21%-29%), or more than three years (64% vs. 70%).

SMEs that are taking no resource efficiency actions are much more likely than those taking actions to have been selling green products or services for less than one year (23% vs. 5%-8%). They are also the least likely to have been selling green products or services for more than three years (55% vs. 68%-73%).

SMEs that say green products or services represented more than 10% of their turnover are the most likely to say they have been selling these for more than three years (83% vs. 61%).

[62] Results for SMEs with a turnover of more than 10 million euros have been excluded from the discussion, due to low base size (99).

**Q16** For how long has your company been selling green products or services?
**(% - EU)**

| | Less than one year | Between 1 and 3 years | More than 3 years | Don't know |
|---|---|---|---|---|
| EU28 | 8 | 20 | 69 | 3 |
| **Turnover 2014** | | | | |
| 100,000 euros or less | 13 | 21 | 64 | 2 |
| More than 100-500,000 euros | 4 | 22 | 72 | 2 |
| More than 500,000 - 2 mil. euros | 6 | 23 | 70 | 1 |
| More than 2- 10 mil. euros | 2 | 21 | 75 | 2 |
| More than 10 mil. euros | 2 | 14 | 82 | 2 |
| **Company's turnover (past 2 years)** | | | | |
| Increased | 5 | 24 | 70 | 1 |
| Decreased | 11 | 18 | 67 | 4 |
| Remained unchanged | 7 | 20 | 72 | 1 |
| **Clients** | | | | |
| Directly to consumers | 9 | 20 | 68 | 3 |
| Other companies | 6 | 21 | 71 | 2 |
| Public administration | 5 | 23 | 71 | 1 |
| **Actions undertaken** | | | | |
| Many actions | 8 | 21 | 69 | 2 |
| Some actions | 5 | 18 | 73 | 4 |
| Few actions | 8 | 21 | 68 | 3 |
| No action | 23 | 21 | 55 | 1 |
| **Turnover green products** | | | | |
| 1 to 5% | 13 | 24 | 61 | 2 |
| 6 to 10% | 9 | 27 | 61 | 3 |
| More than 10% | 1 | 16 | 83 | 0 |

*Base: SMEs that offer green products or services = 3,392*

## Comparison between the EU and US

SMEs in the US are more likely to have been selling green products or services for longer than their EU counterparts[63]. More than eight out of ten US SMEs selling green products or services have been doing so for more than three years (81%), compared to 69% of those in the EU.

None of the US SMEs surveyed have been selling these for less than one year, compared to 8% of EU SMEs.

## National analysis

It was not possible to perform a national analysis due to low base sizes.

[63] Care should be taken when interpreting the results for the US, due to low base size (115).

## d. Where do SMEs sell their green products or services?

SMEs were asked about the main markets, in terms of turnover in the last two years, for their green products or services[64]. For the large majority (91%), their national market is the main market for their green products or services. Almost one in five (17%) say their main market is the EU plus Iceland, Lichtenstein, Norway and Switzerland.

Other areas are the main markets for 3% or less of SMEs that sell green products or services.

There have been no notable changes in the main markets for green products and services since 2013.

**Q17** In terms of turnover over the past 2 years, what were the main markets (countries/ geographical regions) for your green products or services? (MULTIPLE ANSWERS POSSIBLE)
**(% - EU28)**

*Base: SMEs that offer green products or services = 3,392*

**Company breakdown**

It was not possible to compare SMEs with large companies, due to low base size (48).

SMEs with fewer than 50 employees are more likely than medium-sized SMEs to say the national market is their main market for green products or services (90%-92% vs. 82%)[65]. The larger the SME, the more likely it is that their main market is the EU plus Iceland, Lichtenstein, Norway and Switzerland: 15% of micro SMEs say this is their main market, compared to 21% of small SMEs and 46% of medium-sized SMEs. Medium-sized SMEs are generally more likely to say each region is one of their main markets, with the exception of Brazil, China, Hong Kong and Macau, South Korea and Japan.

[64] Q17. In terms of turnover over the past 2 years, what were the main markets (countries/geographical regions) for your green products or services? National market; European Union (EU-28) + Iceland + Lichtenstein + Norway + Switzerland; Other European countries excluding Russia (M); Russia; North American countries except USA; USA; South America and Central America excluding Brazil; Brazil; Africa; Middle East China, Hong Kong and Macau; South Korea; Japan; Other Asian countries; Australia and New Zealand + Oceania.
[65] Care should be taken when interpreting the results for large SMEs, due to low base size (112).

Manufacturing (22%) and services (21%) SMEs are more likely than those in retail (16%) and industry (12%) to say that the EU plus Iceland, Lichtenstein, Norway and Switzerland is a main market for their green products or services. Retail and services SMEs are the most likely to say the national market is their main market (88% vs. 92%-94%).

**Q17** In terms of turnover over the past 2 years, what were the main markets (countries/ geographical regions) for your green products or services? (DO NOT READ OUT - MULTIPLE ANSWERS POSSIBLE)
**(% - EU)**

| | National market | European Union (EU-28) + Iceland + Lichtenstein + Norway + Switzerland | Other European countries excluding Russia |
|---|---|---|---|
| EU28 | 91 | 17 | 3 |
| **Company size** | | | |
| 1-9 | 92 | 15 | 2 |
| 10-49 | 90 | 21 | 5 |
| 50-249 | 82 | 46 | 15 |
| **Sectors grouped (NACE)** | | | |
| Manufacturing (C) | 88 | 22 | 6 |
| Retail (G) | 92 | 16 | 1 |
| Services (I/J/K/H/L/M) | 88 | 21 | 5 |
| Industry (B/D/E/F) | 94 | 12 | 1 |

*Base: SMEs that offer green products or services = 3,392*

SMEs with a turnover of 500,000 or less are the most likely to say the national market is their main market for green products or services (92%-93% vs. 83%-88%). SMEs with a turnover of more than two million to ten million, on the other hand, are the most likely to say their main market is the EU plus Iceland, Lichtenstein, Norway and Switzerland (26% vs. 11%-20%)[66].

SMEs whose turnover has decreased in the last two years are the most likely to say the national market is their main market (96% vs. 88%), and are much less likely to say the main market is the EU plus Iceland, Lichtenstein, Norway and Switzerland compared to SMEs whose turnover has increased or remained the same (8% vs. 24% and 20%).

**Q17** In terms of turnover over the past 2 years, what were the main markets (countries/ geographical regions) for your green products or services? (DO NOT READ OUT - MULTIPLE ANSWERS POSSIBLE)
**(% - EU)**

| | National market | European Union (EU-28) + Iceland + Lichtenstein + Norway + Switzerland | Other European countries excluding Russia |
|---|---|---|---|
| EU28 | 91 | 17 | 3 |
| **Turnover 2014** | | | |
| 100,000 euros or less | 92 | 20 | 1 |
| More than 100-500,000 euros | 93 | 11 | 2 |
| More than 500,000 - 2 mil. euros | 88 | 20 | 1 |
| More than 2- 10 mil. euros | 86 | 26 | 10 |
| More than 10 mil. euros | 83 | 29 | 4 |
| **Company's turnover (past 2 years)** | | | |
| Increased | 88 | 24 | 4 |
| Decreased | 96 | 8 | 1 |
| Remained unchanged | 88 | 20 | 4 |

*Base: SMEs that offer green products or services = 3,392*

It was not possible to perform a national analysis due to low base sizes.

[66] Results for SMEs with a turnover of more than 10 million euros have been excluded from the discussion, due to low base size (99).

# 2 Do policies help SMEs to offer green products or services?

## a. General overview

SMEs were asked about the kind of support they rely on to produce their green products or services[67].

**- SMEs are much more likely to rely on their own resources, rather than external support, to produce green products or services –**

Almost six out of ten SMEs that offer green products or services rely on their own financial resources to produce these green products or services (59%), while almost as many (57%) rely on their own technical expertise. More than one in five says they rely on external support (23%).

There have been no notable changes since 2013.

**Q18** What type of support does your company rely on for the production of its green products or services? (MULTIPLE ANSWERS POSSIBLE)
**(% - EU28)**

*Base: SMEs that offer green products or services = 3,392*

It was not possible to compare SMEs with large companies, due to low base size (48).

SMEs with 50-249 employees are much more likely than smaller SMEs to rely on their own financial resources (73% vs. 57%-59%)[68]. Those with at least 10 employees are more likely than micro SMEs to rely on their own technical expertise (64%-67% vs. 55%), but there is no notable difference in the proportions who rely on external support to produce their green products or services.

Manufacturing SMEs are the most likely to rely on their own financial resources (70% vs. 54%-60%). They are also the most likely to rely on their own technical expertise (73%), followed by SMEs in industry (65%), services (58%) and retail (47%).

[67] Q18. What type of support does your company rely on for the production of its green products or services? Its own financial resources; Its own technical expertise; External support; Other (DO NOT READ OUT); DK/NA

[68] Care should be taken when interpreting the results for large SMEs, due to low base size (112).

SMEs in Industry and services are more likely than those in manufacturing and retail to say they rely on external support to produce their green products or services (32% and 27% vs. 20%-21%).

**Q18** What type of support does your company rely on for the production of its green products or services?
**(% - EU)**

| | Its own financial resources | Its own technical expertise | External support | Other (SPONTANEOUS) | Don't know |
|---|---|---|---|---|---|
| EU28 | 59 | 57 | 23 | 4 | 8 |
| **Company size** | | | | | |
| 1-9 | 59 | 55 | 22 | 4 | 8 |
| 10-49 | 57 | 64 | 26 | 2 | 7 |
| 50-249 | 73 | 67 | 25 | 2 | 5 |
| **Sectors grouped (NACE)** | | | | | |
| Manufacturing (C) | 70 | 73 | 21 | 1 | 2 |
| Retail (G) | 54 | 47 | 20 | 6 | 12 |
| Services (I/J/K/H/L/M) | 58 | 58 | 27 | 4 | 5 |
| Industry (B/D/E/F) | 60 | 65 | 32 | 3 | 4 |

*Base: SMEs that offer green products or services = 3,392*

SMEs whose turnover has remained the same or increased in the past two years are more likely to say they rely on external support to produce their green products or services, compared to SMEs whose turnover has decreased (26% and 25% vs. 17%).

Companies that only sell to consumers (17%) are less likely than those that sell to consumers and other companies (27%) or to companies and administration (36%) to rely on external support to produce their green products or services. Companies that sell to other companies and administration are the most likely to rely on their own technical expertise (69% vs. 50%-55%).

**Q18** What type of support does your company rely on for the production of its green products or services?
**(% - EU)**

| | Its own financial resources | Its own technical expertise | External support | Other (SPONTANEOUS) | Don't know |
|---|---|---|---|---|---|
| EU28 | 59 | 57 | 23 | 4 | 8 |
| **Turnover 2014** | | | | | |
| 100,000 euros or less | 62 | 63 | 16 | 2 | 4 |
| More than 100-500,000 euros | 67 | 56 | 21 | 4 | 7 |
| More than 500,000 - 2 mil. euros | 55 | 55 | 29 | 3 | 12 |
| More than 2- 10 mil. euros | 46 | 52 | 34 | 9 | 7 |
| More than 10 mil. euros | 71 | 79 | 37 | 1 | 2 |
| **Clients** | | | | | |
| Directly to consumers | 58 | 54 | 22 | 4 | 8 |
| Other companies | 63 | 60 | 24 | 3 | 7 |
| Public administration | 62 | 61 | 27 | 3 | 8 |

*Base: SMEs that offer green products or services = 3,392*

**Comparison between the EU and US**

SMEs in the US are much more likely than those in the EU to rely on external support to produce green products or services (41% vs. 23%)[69]. SMEs in the EU are more likely than those in the US to rely on their own financial resources (59% vs. 49%) or their own technical expertise (57% vs. 52%).

It was not possible to perform a national analysis due to low base sizes.

## b. Types of external support used by SMEs for the production of green products or services

SMEs that receive external support for the production of green products or services were asked about the form that support takes[70].

At least one in five receive advice or other non-financial assistance from business associations (27%) or from private consulting and audit companies (23%). Fifteen percent receive private funding from a bank, investment company or venture capital fund, while 13% receive advice or other non-financial assistance from public administration and 12% receive public funding such as grants, guarantees or loans. Just, three percent receive private funding from friends or relatives, while 26% receive other external support.

The proportion of SMEs receiving advice or other non-financial assistance from private consulting and audit companies has decreased by thirteen percentage points since 2013.

The proportion of SMEs advice or other non-financial assistance from public administration has declined five points, while the proportion receiving advice or other non-financial assistance from business associations has also declined by four points.

It worth to highlight that there has been a ten percentage point increase in the proportion of SMEs receiving other external support for the production of their green products or services.

[69] Care should be taken when interpreting the results for the US, due to low base size (115).

[70] Q19. Which type of external support does your company get for the production of its green products or services? Public funding such as grants, guarantees or loans (M); Private funding (e.g. from a bank, investment company or venture capital fund) (M); Private funding from friends or relatives (M); Advice or other non-financial assistance from public administration; Advice or other non-financial assistance from private consulting and audit companies; Advice or other non-financial assistance from business associations; Other (DO NOT READ OUT); DK/NA

**Q19** Which type of external support does your company get for the production of its green products or services? (MULTIPLE ANSWERS POSSIBLE)
**(% - EU28)**

*Base: SMEs that receive external support to produce its green products or services = 767*

## Company breakdown

It was not possible to compare SMEs with large companies, due to low base size (10).

Micro SMEs are less likely than small SMEs to rely on private sector support (53% vs. 69%). In particular, small SMEs are much more likely than micro SMEs to rely on private funding from a bank, investment company or venture capital fund (31% vs. 11%), and are also more likely to rely on advice or other non-financial assistance from private consulting and audit companies (30% vs 21%). There is no difference between these two groups for public sector support[71].

Manufacturing SMEs are the most likely to rely on advice or other non-financial assistance from business associations (38% vs. 20%-26%) or public funding (20% vs. 6%-14%)[72]. Manufacturing and industry SMEs are more likely than those in retail to rely on advice or other non-financial assistance from private consulting and audit companies (26% and 24% vs. 18%). Industry sector SMEs are the most likely to rely on private funding from a bank, investment company or venture capital fund to produce their green products or services (31% vs. 8%-12%).

[71] Large SMEs were excluded from the analysis due to very low base size (28). Care should be taken when interpreting the results for mid-sized SMEs, due to low base size (143).
[72] Service sector SMEs have been excluded from the analysis, due to very low base size (85).

**Q19** Which type of external support does your company get for the production of its green products or services? (MULTIPLE ANSWERS POSSIBLE)
**(% - EU)**

| | Public funding such as grants, guarantees or loans | Private funding from a bank, investment company or venture capital fund | Private funding from friends or relatives | Advice or other non-financial assistance from public administration | Advice or other non-financial assistance from private consulting and audit companies | Advice or other non-financial assistance from business associations |
|---|---|---|---|---|---|---|
| EU28 | 12 | 15 | 3 | 13 | 23 | 27 |
| **Company size** | | | | | | |
| 1-9 | 11 | 11 | 4 | 14 | 21 | 26 |
| 10-49 | 14 | 31 | 0 | 11 | 30 | 28 |
| 50-249 | 13 | 39 | 0 | 17 | 31 | 44 |
| **Sectors grouped (NACE)** | | | | | | |
| Manufacturing (C) | 20 | 12 | 7 | 6 | 26 | 38 |
| Retail (G) | 9 | 8 | 1 | 16 | 18 | 26 |
| Services (I/J/K/H/L/M) | 14 | 23 | 7 | 16 | 33 | 22 |
| Industry (B/D/E/F) | 6 | 31 | 2 | 13 | 24 | 20 |

*Base: SMEs that receive external support to produce its green products or services = 767*

SMEs whose turnover has increased in the last two years are the most likely to say they rely on public funding (20% vs. 6%-8%), or advice or other non-financial assistance from business associations (32% vs. 24%-26%) to produce their green products or services. SMEs whose turnover has decreased are the most likely to rely on advice or other non-financial assistance from private consulting and audit companies (33% vs. 20%-21%).

**Q19** Which type of external support does your company get for the production of its green products or services? (MULTIPLE ANSWERS POSSIBLE)
**(% - EU)**

| | Public funding such as grants, guarantees or loans | Private funding from a bank, investment company or venture capital fund | Private funding from friends or relatives | Advice or other non-financial assistance from public administration | Advice or other non-financial assistance from private consulting and audit companies | Advice or other non-financial assistance from business associations |
|---|---|---|---|---|---|---|
| EU28 | 12 | 15 | 3 | 13 | 23 | 27 |
| **Turnover 2014** | | | | | | |
| 100,000 euros or less | 6 | 11 | 13 | 18 | 14 | 20 |
| More than 100-500,000 euros | 15 | 9 | 2 | 15 | 27 | 26 |
| More than 500,000 - 2 mil. euros | 11 | 16 | 2 | 11 | 26 | 25 |
| More than 2- 10 mil. euros | 22 | 30 | 0 | 14 | 25 | 34 |
| More than 10 mil. euros | 6 | 31 | 6 | 4 | 25 | 56 |
| **Company's turnover (past 2 years)** | | | | | | |
| Increased | 20 | 18 | 1 | 15 | 21 | 32 |
| Decreased | 6 | 12 | 2 | 15 | 33 | 24 |
| Remained unchanged | 8 | 15 | 7 | 11 | 20 | 26 |

*Base: SMEs that receive external support to produce its green products or services = 767*

It was not possible to perform a national analysis due to low base sizes.

## c. Does public support work?

SMEs that receive public funding or other public support to produce their green products or services were asked how satisfied they are with the level of this support[73].

Overall, two thirds are satisfied (66%), with 5% saying they are very satisfied. Thirty one percent are dissatisfied, with five percent saying they are very dissatisfied.

Compared to 2013, SMEs are more likely to be fairly satisfied (+9 pp) or fairly dissatisfied (+5 pp).

**Q20** How satisfied or dissatisfied are you with the level of public support for your green products or services?
**(% - EU)**

*(September 2015 - September 2013)*

*Base: SMEs that receive public funding or advice or other non-financial assistance from public administration to produce its green products or services = 174*

It was not possible to compare SMEs with large companies, due to low base size (2).

National analysis, and an analysis based on company characteristics were not possible due to very low base sizes.

[73] Q20 How satisfied or dissatisfied are you with the level of public support for your green products or services? (M) Very satisfied; Fairly satisfied; Fairly dissatisfied; Very dissatisfied; DK/NA

## d. Encouraging new green products and services: where the focus should lie

SMEs that offer green products or services were asked what kind of support would help them most to expand their offering in this area[74].

**- Financial incentives and assistance identifying potential markets or customers are seen as most helpful in expanding green product or service offerings –**

SMEs are most likely to say financial incentives for developing products, services or new production processes would most help them expand their range of green products or services (35%), closely followed by assistance with identifying potential markets or customers (32%). More than one quarter say technical support and consultancy for the development of products, services and production processes would help (28%), while 23% say this about consultancy services for marketing or distribution.

Almost one in five SMEs that offer green products or services say none of these types of support would help them expand their range of green products or services (18%).

SMEs offering green products or services are less likely than they were in 2013 to say financial incentives would most help them expand their range of green products or services (-11 percentage points). However, they are more likely to mention technical support and consultancy (+6 pp), assistance with identifying potential markets or customers (+5 pp) or consultancy services for marketing or distribution (+4 pp).

**Q21A** What type of support would help you the most to expand your range of green products or services ? (MAX. 2 ANSWERS)
**(% - EU28)**

*Base: SMEs that offer green products or services = 3,392*

[74] Q21A. What type of support would help you the most to expand your range of green products or services? Financial incentives for developing products, services or new production processes; Assistance with identifying potential markets or customers; Technical support and consultancy for the development of products, services and production processes; Consultancy services for marketing or distribution; Other (DO NOT READ OUT); None (DO NOT READ OUT) ; DK/NA

## Company breakdown

It was not possible to compare SMEs with large companies, due to low base size (48).

Small SMEs are the most likely to say financial incentives for developing products, services or new production processes (45% vs. 33%) or technical support and consultancy (33% vs. 26%-27%) would most help them expand their range of green products or services[75]. SMEs with fewer than 50 employees are the most likely to mention consultancy services for marketing or distribution (23% vs. 17%).

The larger the SME, the less likely it is to say assistance with identifying potential markets or customers would help expand their range of green products or services: 33% of micro SMEs mention this kind of support, compared to 27% of small SMEs and 18% of medium-sized SMEs.

Services (42%) and manufacturing (38%) SMEs are more likely than those in retail (33%) and industry (31%) to mention financial incentives for developing products, services or new production processes. Manufacturing (35%) and retail (34%) SMEs are the most likely to mention assistance with identifying potential markets or customers, while industry SMEs are the most likely to mention consultancy services for marketing and distribution (28% vs. 17%-22%).

**Q21A** What type of support would help you the most to expand your range of green products or services ? (MAX. 2 ANSWERS POSSIBLE)

| | Financial incentives for developing products, services or new production processes | Assistance with identifying potential markets or customers | Technical support and consultancy for the development of products, services and production | Consultancy services for marketing or distribution | Other (SPONTANEOUS) | None (SPONTANEOUS) | Don't know |
|---|---|---|---|---|---|---|---|
| EU28 | 35 | 32 | 28 | 23 | 2 | 18 | 5 |
| **Company size** | | | | | | | |
| 1-9 | 33 | 33 | 27 | 23 | 2 | 19 | 5 |
| 10-49 | 45 | 27 | 33 | 23 | 3 | 12 | 5 |
| 50-249 | 33 | 18 | 26 | 17 | 1 | 20 | 13 |
| **Sectors grouped (NACE)** | | | | | | | |
| Manufacturing (C) | 38 | 35 | 30 | 21 | 1 | 17 | 5 |
| Retail (G) | 33 | 34 | 25 | 22 | 2 | 19 | 5 |
| Services (I/J/K/H/L/M) | 42 | 24 | 29 | 17 | 3 | 13 | 7 |
| Industry (B/D/E/F) | 31 | 24 | 32 | 28 | 2 | 18 | 7 |

*Base: SMEs that offer green products or services = 3,392*

SMEs with a turnover of more than two million to ten million euros are the most likely to say financial incentives would most help them, particularly compared to SMEs with the lowest turnover (29%)[76]. SMEs with a turnover of two million euros or less are the most likely to say that consultancy services for marketing or distribution would most help them expand their range of green products or services (23%-24% vs. 11%).

SMEs that sell to other companies are the most likely to say assistance with identifying potential markets or customers would help them expand their range of green products or services (36% vs. 28%-30%).

[75] Care should be taken when interpreting the results for large SMEs, due to low base size (112).
[76] Results for SMEs with a turnover of more than 10 million euros have been excluded from the discussion, due to low base size (99).

SMEs that receive public sector support for the production of their green products or services are more likely than those receiving private support to mention financial incentives for developing products, services or new production processes (41% vs. 35%) or technical support and consultancy for the development of products, services and production processes (46% vs. 35%).

**Q21A** What type of support would help you the most to expand your range of green products or services ? (MAX. 2 ANSWERS POSSIBLE)

| | Financial incentives for developing products, services or new production processes | Assistance with identifying potential markets or customers | Technical support and consultancy for the development of products, services and production | Consultancy services for marketing or distribution | Other (SPONTANEOUS) | None (SPONTANEOUS) | Don't know |
|---|---|---|---|---|---|---|---|
| EU28 | 35 | 32 | 28 | 23 | 2 | 18 | 5 |
| **Turnover 2014** | | | | | | | |
| 100,000 euros or less | 29 | 38 | 28 | 24 | 1 | 17 | 4 |
| More than 100-500,000 euros | 41 | 29 | 34 | 24 | 1 | 14 | 5 |
| More than 500,000 - 2 mil. euros | 37 | 34 | 27 | 23 | 2 | 16 | 2 |
| More than 2- 10 mil. euros | 46 | 33 | 32 | 11 | 3 | 18 | 2 |
| More than 10 mil. euros | 36 | 33 | 36 | 17 | 1 | 20 | 4 |
| **Clients** | | | | | | | |
| Directly to consumers | 34 | 30 | 27 | 23 | 2 | 19 | 6 |
| Other companies | 37 | 36 | 27 | 20 | 2 | 17 | 4 |
| Public administration | 41 | 28 | 31 | 19 | 2 | 17 | 4 |
| **Type of external support in relation to actions** | | | | | | | |
| Public sector | 44 | 42 | 35 | 28 | 1 | 4 | 8 |
| Private sector | 39 | 41 | 36 | 21 | 0 | 10 | 5 |
| Others | 37 | 49 | 30 | 30 | 2 | 4 | 0 |

*Base: SMEs that offer green products or services = 3,392*

## Comparison between the EU and US

Compared to SMEs in the EU, those in the US are more likely to say financial incentives for developing products, services or new production processes would most help them expand their range of green products or services (45% vs. 35%)[77].

SMEs in the EU, on the other hand, are more likely than their EU counterparts to mention consultancy services for marketing or distribution (23% vs. 13%).

It was not possible to perform a national analysis due to low base sizes.

[77] Care should be taken when interpreting the results for the US, due to low base size (115).

## SMEs that do not offer green products or services

SMEs that do not offer green products or services were asked what kind of support would help them to launch a range of green products or services[78].

**– Financial incentives are considered the best support for launching green products or services –**

Amongst SMEs that do not currently offer green products or services, one quarter say financial incentives for developing products, services or new production processes would be the most help in launching green products or services (25%).

Almost one in five mention assistance with identifying potential markets or customers (19%), while 15% say technical support and consultancy for the development of products, services and production processes would help them the most. Just over one in ten say consultancy services for marketing or distribution would most help them launch their own green products or services (12%).

However, almost half of this group of SMEs say none of these things would help them launch their own range of green products or services (46%).

In general the changes since 2013 have been relatively small, although there has been a four percentage point decrease in the proportion of SMEs that say financial incentives would most help them launch their own green products or services. The largest change has been a nine point increase in the proportion of SMEs that say none of these kinds of support would help them.

**Q21B** What type of support would help you the most to launch your range of green products or services ? (MAX. 2 ANSWERS)
**(% - EU28)**

*Base: SMEs that do not offer green products or services = 8,669*

[78] Q21B. What type of support would help you the most to launch your range of green products or services? Financial incentives for developing products, services or new production processes; Assistance with identifying potential markets or customers; Technical support and consultancy for the development of products, services and production processes; Consultancy services for marketing or distribution; Other (DO NOT READ OUT); None (DO NOT READ OUT) ; DK/NA

**Company breakdown**

It was not possible to compare SMEs with large companies, due to low base size (85).

Small SMEs are the most likely to say that financial incentives for developing products, services or new production processes would most help them launch their own green products or services (30% vs. 24%). Looking specifically at micro SMEs, those with 2-9 employees are much more likely than solo operators to mention financial incentives (45% vs. 24%) or technical support and consultancy (25% vs. 9%).

Industry sector SMEs are the most likely to mention financial incentives, particularly compared to those in the services sector (29% vs. 20%). Manufacturing SMEs are the most likely to mention assistance with identifying potential markets or customers (22%), particularly compared to SMEs in the services (15%) and industry sectors (16%).

**Q21B** What type of support would help you the most to launch your range of green products or services ? (MAX. 2 ANSWERS POSSIBLE)
**(% - EU)**

| | Financial incentives for developing products, services or new production processes | Assistance with identifying potential markets or customers | Technical support and consultancy for the development of products, services and production | Consultancy services for marketing or distribution | Other (SPONTANEOUS) | None (SPONTANEOUS) | Don't know |
|---|---|---|---|---|---|---|---|
| EU28 | 25 | 19 | 15 | 12 | 2 | 46 | 5 |
| **Company size** | | | | | | | |
| 1-9 | 24 | 19 | 14 | 12 | 2 | 48 | 5 |
| 10-49 | 30 | 20 | 19 | 11 | 1 | 42 | 5 |
| 50-249 | 24 | 19 | 17 | 13 | 5 | 44 | 8 |
| **Sectors grouped (NACE)** | | | | | | | |
| Manufacturing (C) | 26 | 22 | 17 | 11 | 2 | 43 | 5 |
| Retail (G) | 24 | 19 | 14 | 13 | 2 | 48 | 5 |
| Services (I/J/K/H/L/M) | 20 | 15 | 12 | 10 | 2 | 53 | 6 |
| Industry (B/D/E/F) | 29 | 16 | 19 | 11 | 1 | 43 | 5 |
| **One person company** | | | | | | | |
| Yes | 24 | 21 | 9 | 14 | 1 | 50 | 3 |
| No | 45 | 18 | 25 | 18 | 5 | 21 | 7 |

*Base: SMEs that do not offer green products or services = 8,669*

SMEs with the largest turnover in 2014 are the least likely to say financial incentives would help them launch their own green products or services (17% vs. 25%-30%). SMEs with a turnover of more than 100,000 up to 500,000 euros are the most likely to say that assistance in identifying potential markets or customers would help them (22% vs. 11%-17%).

SMEs that are planning to offer green products or services are much more likely to say that each type of support would help them, compared to those not planning to do so. For example 52% say financial incentives would help them launch green products or services, compared to 22% of SMEs with no plans to offer green products or services.

**Q21B** What type of support would help you the most to launch your range of green products or services ? (MAX. 2 ANSWERS POSSIBLE)
**(% - EU)**

| | Financial incentives for developing products, services or new production processes | Assistance with identifying potential markets or customers | Technical support and consultancy for the development of products, services and production | Consultancy services for marketing or distribution | Other (SPONTANEOUS) | None (SPONTANEOUS) | Don't know |
|---|---|---|---|---|---|---|---|
| EU28 | 25 | 19 | 15 | 12 | 2 | 46 | 5 |
| **Turnover 2014** | | | | | | | |
| 100,000 euros or less | 26 | 17 | 14 | 12 | 3 | 47 | 4 |
| More than 100-500,000 euros | 30 | 22 | 20 | 16 | 1 | 36 | 5 |
| More than 500,000 - 2 mil. euros | 25 | 22 | 14 | 11 | 1 | 48 | 4 |
| More than 2- 10 mil. euros | 27 | 15 | 15 | 14 | 1 | 47 | 5 |
| More than 10 mil. euros | 17 | 11 | 14 | 10 | 1 | 57 | 7 |
| **Offer green products or services** | | | | | | | |
| Yes | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| No, but planning to do so | 52 | 42 | 27 | 28 | 1 | 6 | 1 |
| No, and not planning to do so | 22 | 16 | 14 | 10 | 2 | 51 | 6 |

*Base: SMEs that do not offer green products or services = 8,669*

## Comparison between the EU and US

In general, there are only minor differences between SMEs in the US and those in the EU. US SMEs are slightly more likely to mention assistance with identifying potential markets or customers (22% vs. 19%) or consultancy services for marketing or distribution (15% vs. 12%), while those in the EU are slightly more likely to mention technical support and consultancy (15% vs. 12% in the US).

The largest difference is the proportion of SMEs that say none of these kinds of support would help them launch their own green products or services: 46% of this group of SMEs in the EU say this, compared to 35% in the US.

## National analysis

In 24 Member States, SMEs that are not currently offering green products or services are most likely to say **financial incentives** for developing products, services or new production processes would most help them launch green products or services[79]. The highest proportions are observed amongst SMEs in France, Poland (both 45%) and Greece (42%), and the lowest proportions amongst those in Italy (9%) and Estonia (13%).

SMEs in Spain (30%), Austria (21%), Slovakia (20%), Sweden (17%), Germany (16%) and Estonia (14%) are most likely to say **assistance identifying potential markets or customers** would be the most help. This option is also widely mentioned by SMEs in France (39%), Ireland (29%), Greece and Portugal (both 27%). At the other end of the scale 7% of this group of SMEs in Hungary, 8% in Italy and 9% in Bulgaria say the same.

Along with financial incentives and assistance identifying potential markets or customers, SMEs in Sweden are most likely to mention **technical support and consultancy for the development of products, services and production processes** (all 17%). This kind of support is also widely mentioned by SMEs in Portugal (28%), France and Greece (both 25%).

By contrast 4% of SMEs in Italy and Cyprus and 5% in Estonia say the same.

[79] Results for Cyprus (136) and Luxembourg (96) should be interpreted with caution due to low base size.

SMEs in Luxembourg (27%), Portugal and Belgium (both 20%) that don't offer green products or services are the most likely to say **consultancy services for marketing or distribution** would help them launch these products or services, compared to 5% in Italy and Estonia. In eight Member States at least half of this group of SMEs say none of these types of support would help them: Italy (76%), Estonia (64%), Cyprus (59%), Hungary (58%), Denmark (57%), the Netherlands (53%), the Czech Republic (52%) and Sweden (50%).

Including non-EU countries in the analysis shows that SMEs in Turkey are the most likely of all countries to say each of these types of support would help them launch their own green products or services. The exception is financial incentives, where (along with SMEs in Greece) they are the second most likely to mention this (42%) after those in France and Poland. SMEs in Macedonia are the most likely of all countries studied to say consultancy services for marketing or distribution would help them (37%)[80].

[80] Due to low base sizes, care should be taken when interpreting results for Albania (53), Macedonia (121), Montenegro (78), Iceland (109) and Moldova (65).

**Q21B** What type of support would help you the most to launch your range of green products or services ? (MAX. 2 ANSWERS) **(%)**

| | Financial incentives for developing products, services or new production processes | Assistance with identifying potential markets or customers | Technical support and consultancy for the development of products, services and production processes | Consultancy services for marketing or distribution | Other (SPONTANEOUS) | None (SPONTANEOUS) | Don't know |
|---|---|---|---|---|---|---|---|
| EU28 | 25 | 19 | 15 | 12 | 2 | 46 | 5 |
| BE | **26** | 22 | 22 | *20* | 0 | 39 | 5 |
| BG | **25** | *9* | 12 | 19 | 3 | 41 | 9 |
| CZ | **22** | 13 | 16 | *12* | 1 | 52 | 6 |
| DK | **27** | 12 | 15 | *6* | 2 | 57 | 3 |
| DE | **16** | **16** | *9* | 13 | 6 | 46 | 12 |
| EE | 13 | **14** | *5* | *5* | 7 | 64 | 3 |
| IE | **34** | 29 | 23 | *8* | 1 | 22 | 14 |
| EL | **42** | 27 | 25 | *9* | 4 | 29 | 0 |
| ES | 28 | **30** | 22 | *15* | 1 | 34 | 2 |
| FR | **45** | 39 | 25 | *17* | 1 | 20 | 2 |
| HR | **32** | 17 | *11* | 14 | 4 | 43 | 5 |
| IT | **9** | 8 | *4* | 5 | 0 | 76 | 5 |
| CY | **29** | 11 | *4* | 15 | 1 | 59 | 0 |
| LV | **29** | *14* | 18 | 15 | 4 | 42 | 3 |
| LT | **20** | 19 | 14 | *13* | 2 | 41 | 13 |
| LU | **35** | *19* | 24 | 27 | 1 | 28 | 0 |
| HU | **23** | *7* | 12 | 9 | 3 | 58 | 2 |
| MT | **29** | 13 | 15 | *8* | 1 | 43 | 5 |
| NL | **17** | 15 | 16 | *11* | 2 | 53 | 3 |
| AT | 20 | **21** | 17 | *15* | 5 | 49 | 1 |
| PL | **45** | *15* | 23 | 16 | 1 | 30 | 3 |
| PT | **32** | 27 | 28 | *20* | 1 | 29 | 6 |
| RO | **36** | *15* | 18 | 18 | 4 | 32 | 5 |
| SI | **28** | *11* | *11* | 13 | 5 | 44 | 3 |
| SK | 18 | **20** | *10* | 16 | 1 | 39 | 10 |
| FI | **32** | *11* | 16 | 14 | 1 | 42 | 2 |
| SE | **17** | **17** | **17** | *8* | 3 | 50 | 8 |
| UK | **33** | 19 | 19 | *10* | 3 | 32 | 13 |
| AL | 7 | 20 | 0 | 1 | 13 | 60 | 2 |
| MK | 36 | 11 | 20 | 37 | 3 | 32 | 2 |
| ME | 38 | 22 | 22 | 20 | 6 | 31 | 0 |
| RS | 32 | 13 | 15 | 6 | 0 | 50 | 6 |
| TR | 42 | 40 | 37 | 28 | 0 | 11 | 2 |
| IS | 29 | 18 | 16 | 16 | 5 | 15 | 29 |
| MD | 27 | 18 | 14 | 17 | 16 | 31 | 3 |
| NO | 18 | 22 | 2 | 13 | 3 | 47 | 8 |
| US | 27 | 22 | 12 | 15 | 2 | 35 | 13 |

**Highest percentage per country** | *Lowest percentage per country* | Highest percentage per item | Lowest percentage per item

*Base: SMEs that do not offer green products or services = 8,669*

**Evolution since 2013**

Although at the EU28 level changes since 2013 are relatively small, this is not the case in all Member States[81]. There have been large increases in the proportion of SMEs in France (18 percentage points), Luxembourg (+16 pp) and Malta (+13 pp) that mention financial incentives, and large decreases in the proportions of SMEs in Italy (-19 pp), Slovakia (-16 pp), Lithuania (-15 pp) and Bulgaria (-13 pp, compared to 2013.

In general there have only been small changes (six points or less) in the proportions mentioning assistance in identifying potential markets or customers. The exceptions are SMEs in France (+23 pp), Austria (+9 pp) and Croatia (+8 pp) where there have been larger increases, and Romania (-8 pp) and Hungary (-7 pp) where there have been slightly larger decreases.

The largest increases in the proportion of SMEs mentioning technical support and consultancy are observed amongst SMEs in Luxembourg (+17 pp), Austria (+8 pp) and the Netherlands (+7 pp), while the largest decreases are observed amongst those in Croatia (-11 pp) and Slovakia (-8 pp).

Changes in the proportions of SMEs mentioning consultancy services for marketing or distribution have also generally been small (five points or less). The exceptions are SMEs in Luxembourg (+13 pp), France (+7 pp), Austria (+6 pp), Greece (-15 pp) and Italy (-8 pp).

There has been a very large increase in the proportion of SMEs in Italy saying none of these kinds of support would help them launch their own green products or services (+35 pp), as well as large increases amongst SMEs in Bulgaria and Estonia (both +18 pp). During the same period the proportions saying this in Malta (-16 pp), Austria (-14 pp) and France (-12 pp) have declined.

[81] Results for Cyprus (136) and Luxembourg (96) should be interpreted with caution due to low base size.

**Q21B** What type of support would help you the most to launch your range of green products or services ? (MAX. 2 ANSWERS) **(%)**

| | Financial incentives for developing products, services or new production processes | Sept. 2015 - Sept. 2013 | Assistance with identifying potential markets or customers | Sept. 2015 - Sept. 2013 | Technical support and consultancy for the development of products, services and production processes | Sept. 2015 - Sept. 2013 | Consultancy services for marketing or distribution | Sept. 2015 - Sept. 2013 | Other (SPONTANEOUS) | Sept. 2015 - Sept. 2013 | None (SPONTANEOUS) | Sept. 2015 - Sept. 2013 | Don't know |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| EU28 | 25 | ▼4 | 19 | ▲2 | 15 | ▼1 | 12 | = | 2 | = | 46 | ▲9 | 5 |
| BE | 26 | ▼1 | 22 | ▼1 | 22 | = | 20 | ▲3 | 0 | = | 39 | ▲7 | 5 |
| BG | 25 | ▼13 | 9 | = | 12 | ▲1 | 19 | = | 3 | ▼2 | 41 | ▲18 | 9 |
| CZ | 22 | ▲4 | 13 | ▲1 | 16 | ▲1 | 12 | = | 1 | = | 52 | ▲8 | 6 |
| DK | 27 | ▲5 | 12 | ▲2 | 15 | ▲6 | 6 | ▼1 | 2 | ▼5 | 57 | ▲9 | 3 |
| DE | 16 | ▼8 | 16 | = | 9 | = | 13 | = | 6 | ▲6 | 46 | ▼2 | 12 |
| EE | 13 | ▼4 | 14 | ▲3 | 5 | ▼3 | 5 | ▼4 | 7 | ▼7 | 64 | ▲18 | 3 |
| IE | 34 | ▲4 | 29 | ▼2 | 23 | ▲4 | 8 | ▼5 | 1 | ▼1 | 22 | ▲7 | 14 |
| EL | 42 | ▼6 | 27 | ▲2 | 25 | ▼2 | 9 | ▼15 | 4 | ▲4 | 29 | ▲7 | 0 |
| ES | 28 | ▼2 | 30 | ▲3 | 22 | = | 15 | ▲4 | 1 | = | 34 | ▲1 | 2 |
| FR | 45 | ▲18 | 39 | ▲23 | 25 | ▲4 | 17 | ▲7 | 1 | ▼1 | 20 | ▼12 | 2 |
| HR | 32 | ▼6 | 17 | ▲8 | 11 | ▼11 | 14 | = | 4 | = | 43 | = | 5 |
| IT | 9 | ▼19 | 8 | ▼6 | 4 | ▼7 | 5 | ▼8 | 0 | ▼6 | 76 | ▲35 | 5 |
| CY | 29 | ▲11 | 11 | ▲4 | 4 | ▼2 | 15 | ▼1 | 1 | = | 59 | ▲5 | 0 |
| LV | 29 | ▼5 | 14 | ▼5 | 18 | ▼1 | 15 | ▲1 | 4 | ▲3 | 42 | ▲13 | 3 |
| LT | 20 | ▼15 | 19 | ▲4 | 14 | ▼4 | 13 | ▼3 | 2 | ▼1 | 41 | ▲6 | 13 |
| LU | 35 | ▲16 | 19 | ▲1 | 24 | ▲17 | 27 | ▲13 | 1 | ▼5 | 28 | ▼9 | 0 |
| HU | 23 | ▼9 | 7 | ▼7 | 12 | ▲3 | 9 | ▲2 | 3 | ▼1 | 58 | ▲9 | 2 |
| MT | 29 | ▲13 | 13 | ▲5 | 15 | ▲4 | 8 | ▼3 | 1 | ▼6 | 43 | ▼16 | 5 |
| NL | 17 | ▲10 | 15 | ▼2 | 16 | ▲7 | 11 | ▲4 | 2 | = | 53 | ▼7 | 3 |
| AT | 20 | ▲4 | 21 | ▲9 | 17 | ▲8 | 15 | ▲6 | 5 | ▲3 | 49 | ▼14 | 1 |
| PL | 45 | ▲2 | 15 | ▲2 | 23 | = | 16 | = | 1 | ▼1 | 30 | ▲3 | 3 |
| PT | 32 | = | 27 | ▲6 | 28 | ▲4 | 20 | ▲1 | 1 | = | 29 | ▲2 | 6 |
| RO | 36 | ▲1 | 15 | ▼8 | 18 | = | 18 | ▲1 | 4 | ▲2 | 32 | ▲11 | 5 |
| SI | 28 | ▼3 | 11 | ▲3 | 11 | = | 13 | ▼1 | 5 | ▲4 | 44 | ▼5 | 3 |
| SK | 18 | ▼16 | 20 | ▼2 | 10 | ▼8 | 16 | = | 1 | ▼1 | 39 | ▲8 | 10 |
| FI | 32 | ▼2 | 11 | ▼3 | 16 | ▼1 | 14 | ▼2 | 1 | ▲1 | 42 | ▲7 | 2 |
| SE | 17 | = | 17 | ▲4 | 17 | ▲1 | 8 | ▲2 | 3 | ▼3 | 50 | ▲10 | 8 |
| UK | 33 | ▼5 | 19 | ▲3 | 19 | ▲5 | 10 | ▼2 | 3 | ▲2 | 32 | ▲4 | 13 |
| AL | 7 | ▼55 | 20 | ▼2 | 0 | ▼10 | 1 | ▼3 | 13 | ▲13 | 60 | ▲37 | 2 |
| MK | 36 | ▲2 | 11 | ▼2 | 20 | ▼3 | 37 | ▲17 | 3 | ▲3 | 32 | ▼4 | 2 |
| ME | 38 | ▼13 | 22 | ▼3 | 22 | ▲6 | 20 | ▲1 | 6 | ▼2 | 31 | ▲23 | 0 |
| RS | 32 | ▲14 | 13 | ▲4 | 15 | ▲4 | 6 | ▲1 | 0 | ▼5 | 50 | ▼9 | 6 |
| TR | 42 | ▲8 | 40 | ▲5 | 37 | ▲15 | 28 | ▲2 | 0 | ▼1 | 11 | = | 2 |
| IS | 29 | ▲2 | 18 | ▲2 | 16 | = | 16 | ▲8 | 5 | ▲2 | 15 | ▲9 | 29 |
| MD | 27 | NA* | 18 | NA* | 14 | NA* | 17 | NA* | 16 | NA* | 31 | NA* | 3 |
| NO | 18 | ▼3 | 22 | ▲12 | 2 | ▼18 | 13 | ▲2 | 3 | ▲2 | 47 | ▲9 | 8 |
| US | 27 | ▼4 | 22 | ▼6 | 12 | ▼8 | 15 | ▼3 | 2 | ▲1 | 35 | ▲4 | 13 |

*Base: Businesses that do not offer green products or services = 8,669*
**Question not asked: this country was not included in the previous survey.*

# 3. Green employment in the SME sector

All companies were asked about employees working in green jobs at least some of the time[82]. A "green job" was defined in this survey as a job that directly deals with information, technologies, or materials that preserves or restores environmental quality. This requires specialised skills, knowledge, training, or experience (e.g. verifying compliance with environmental legislation, monitoring resource efficiency within the company, promoting and selling green products and services).

**- More than one third of SMEs have at least one full time employee working in green jobs some or all of the time –**

Almost three in ten SMEs have 1-5 full time employees working in green jobs at least some of the time (29%). A further three percent have 6-9 employees working in green jobs, while two percent have 10-50 employees in green jobs.

Most SMEs (60%) have no full time employees in green jobs at least some of the time. Compared to 2013, there has been a seven percentage point decrease in the proportion of SMEs with at least one employee in green jobs. Much of this is attributable to the six percentage point decrease in the proportion with 1-5 employees in green jobs. The proportion of SMEs with no employees in green jobs has increased by eight points.

**Q22** In your company, how many of your full time employees, including yourself, work in green jobs some or all of the time? **(% - EU28)**

*Base: All SMEs (12,913)*

Compared to SMEs, large companies are more likely to have at least one full time employee in green jobs at least some of the time (45% vs. 35%)[83]. In fact, 24% have 10 or more full time employees in green jobs at least some of the time, compared to 2% of SMEs. For SMEs the average number of full time employees in green jobs is 5.3, compared to 50.6 for large companies.

The larger the SME, the more likely it is to have at least one full time employee working in a green job: 33% of micro SMEs have at least one employee in a green job, compared to 39% of small SMEs and 45% of medium-sized SMEs. The average number of green employees also increases with company size from 3.2 for micro SMEs to 33.2 for large SMEs.

SMEs in the industry (40%) and manufacturing (39%) sector are the most likely to have at least on green employee, compared to 33% of services SMEs and 39% of manufacturing SMEs. However, the average number of green employees in services sector SMEs is the highest (10.0 vs. 4.4-5.3).

[82] Q22. In your company, how many of your full time employees, including yourself, work in green jobs some or all of the time?
[83] Care should be taken when interpreting the results for large companies, due to low base size (146).

More than half of all SMEs with a turnover of more than 10 million euros have at least one full time employee working in a green job at least some of the time (54%), compared to 34%-38% of SMEs with smaller turnovers. The higher an SMEs turnover, the higher their average number of green employees: SMEs with a turnover of 100,000 or less have an average of 3.7, compared to 12.0 for SMEs with the largest turnover.

The more resource efficiency actions an SME is taking, the more likely they are to have at least one green employee: 18% of SMEs taking no actions have at least one green employee, compared to 46% of those taking many actions. SMEs taking many actions also have the highest average number of green employees (6.3 vs. 3.4-4.9).
SMEs that bid successfully on a public procurement contract with environmental requirements have a much higher average number of green employees than those who were unsuccessful, or who did not bid (13.1 vs. 5.3 and 4.6 respectively).

## National analysis

There are only three Member States where at least half of all SMEs have one or more full time employee working in a green job at least some of the time: Spain (67%), Slovakia (52%) and Finland (50%). This compares to 14% of SMEs in Estonia, 19% in Lithuania and 20% in the Czech Republic. The map illustrates that SMEs with at least one full time employee working in green jobs are more likely to be found in Northern, Eastern and some Southern areas of the EU.

*Base: All SMEs (12,913)*

**Q22** In your company, how many of your full time employees, including yourself, work in green jobs some or all of the time?

| | Average | Sept. 2015 - Sept. 2013 |
|---|---|---|
| EU28 | 1.7 | ▼ 0.4 |
| BG | 3.5 | ▲ 1.4 |
| NL | 2.5 | ▲ 1.4 |
| FR | 2.0 | ▲ 1.2 |
| MT | 2.4 | ▲ 1.2 |
| CY | 1.4 | ▲ 0.7 |
| HU | 1.7 | ▲ 0.7 |
| LT | 1.4 | ▲ 0.5 |
| ES | 2.3 | ▲ 0.2 |
| RO | 3.6 | ▼ 0.1 |
| EE | 0.4 | ▼ 0.2 |
| CZ | 1.2 | ▼ 0.3 |
| IE | 1.4 | ▼ 0.4 |
| BE | 1.4 | ▼ 0.5 |
| EL | 2.8 | ▼ 0.5 |
| LU | 2.3 | ▼ 0.6 |
| AT | 1.6 | ▼ 0.6 |
| SI | 1.7 | ▼ 0.7 |
| DK | 1.6 | ▼ 0.8 |
| PT | 1.2 | ▼ 0.8 |
| DE | 2.0 | ▼ 0.9 |
| IT | 1.0 | ▼ 1.2 |
| SK | 2.4 | ▼ 1.2 |
| FI | 1.7 | ▼ 1.2 |
| PL | 1.4 | ▼ 1.3 |
| LV | 2.1 | ▼ 1.3 |
| UK | 1.1 | ▼ 1.4 |
| SE | 2.0 | ▼ 1.8 |
| HR | 3.0 | ▼ 1.9 |
| RS | 4.4 | ▲ 1.8 |
| MK | 1.2 | ▲ 0.3 |
| TR | 1.7 | ▲ 0.6 |
| AL | 1.5 | ▼ 0.6 |
| ME | 3.3 | ▼ 6.6 |
| NO | 5.0 | ▲ 1.6 |
| IS | 3.5 | ▲ 0.3 |
| US | 1.6 | ▼ 2.1 |
| MD | 7.3 | NA* |

*Base: All SMEs (12,913)*

## Comparison between the EU and the US

When looking at the difference between the average number of green jobs in SMEs in the US and the EU taken as a whole, the results prove to be very similar. In the US, the average number of green jobs is 1.6, whereas in the EU, the average is 1.7. However, the US has witnessed a steep decrease since 2013 when the average was 3.7.

## National analysis

Overall, 13 Member States have averages of at least two green employees. SMEs in Romania (3.6), Bulgaria (3.5) and Croatia (3.0) have the largest average number of green jobs with at least three. By comparison, Estonian SMEs only have 0.4 employees working in green jobs, followed by Italian SMEs (1.0) and SMEs in the UK (1.1).

## Evolution since 2013

The majority of countries across the EU have witnessed a decrease in the number of employees working in green jobs since 2013. The sharpest decreases are seen in Croatia (-1.9) and Sweden (-1.8) while the largest increases are observed in Bulgaria (+1.4) and the Netherlands (+1.4).

The average number of full time employees in green jobs in Serbia (4.4) and Norway (5.0) are amongst the highest of all countries studied.

The following section analyses the average number of green jobs by country, but only looking at the SMEs that have at least one employee working in a green job.

## Comparison between the EU and US

Taking into consideration the SMEs that have at least one green job, for EU SMEs as a whole, the average number of full time employees working in green jobs is 5.3, a slight increase since 2013 when the average was 4.8. Compared to the EU, SMEs in the US have a lower average number of employees in green jobs (3.4).

## National analysis

In terms of the SMEs which have at least one green employee, SMEs in Germany have the highest average number working in green jobs at least some of the time (12.7), followed by SMEs in Slovakia (9.9), the Netherlands (9.2), Romania (8.9) and Bulgaria (8.5). The lowest averages are found amongst SMEs in Estonia (3.0), Finland, Portugal and Spain (all 3.2).

## Evolution since 2013

Since 2013, the largest increases in the average number of full time employees doing green jobs at least some of the time occurred amongst SMEs in the Netherlands (+5.7), followed by Germany (+5), France (+4.5) and Slovakia (+4.3). The largest decreases are observed amongst SMEs in Estonia (-2.6) and Latvia (-2.5).

**Q22** In your company, how many of your full time employees, including yourself, work in green jobs some or all of the time?

| | Average | Sept. 2015 - Sept. 2013 |
|---|---|---|
| EU28 | 5.3 | ▲ 0,5 |
| NL | 9.2 | ▲ 5,7 |
| DE | 12.7 | ▲ 5 |
| FR | 7.1 | ▲ 4,5 |
| SK | 9.9 | ▲ 4,3 |
| CY | 5.8 | ▲ 2,9 |
| BE | 7.6 | ▲ 2,7 |
| HU | 7.0 | ▲ 2,2 |
| LT | 6.9 | ▲ 2,1 |
| MT | 7.5 | ▲ 1,2 |
| CZ | 5.8 | ▲ 1,1 |
| BG | 8.5 | ▲ 0,9 |
| HR | 5.9 | ▲ 0,7 |
| RO | 8.9 | ▲ 0,5 |
| IT | 3.3 | ▼ 0,4 |
| SI | 4.7 | ▼ 0,5 |
| ES | 3.2 | ▼ 0,6 |
| IE | 3.3 | ▼ 0,8 |
| EL | 5.8 | ▼ 1,3 |
| LU | 5.2 | ▼ 1,3 |
| PT | 3.2 | ▼ 1,4 |
| PL | 3.8 | ▼ 1,5 |
| SE | 4.8 | ▼ 1,7 |
| AT | 4.5 | ▼ 1,9 |
| DK | 5.9 | ▼ 2,1 |
| FI | 3.2 | ▼ 2,3 |
| UK | 4.1 | ▼ 2,3 |
| LV | 4.0 | ▼ 2,5 |
| EE | 3.0 | ▼ 2,6 |
| AL | 9.1 | ▲ 6,2 |
| RS | 9.9 | ▲ 2,5 |
| MK | 7.0 | ▲ 2,4 |
| TR | 6.6 | ▼ 0,6 |
| ME | 8.5 | ▼ 4,5 |
| NO | 9.6 | ▲ 1,4 |
| IS | 6.8 | ▲ 1,1 |
| US | 3.4 | ▼ 4,8 |
| MD | 12.3 | NA* |

*Base: SMEs that have at least one green employee (4,494)*
**Question not asked: this country was not included in the previous survey*

## TECHNICAL SPECIFICATIONS

Between the 1st of September and the 18th of September 2015, TNS political & social, a consortium created between TNS political & social, TNS UK and TNS opinion, carried out the FLASH EUROBAROMETER 426 survey on request of the EUROPEAN COMMISSION, Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs. It is a business to business survey co-ordinated by the Directorate-General for Communication, "Strategy, Corporate Communication Actions and Eurobarometer" Unit.

The FLASH EUROBAROMETER 426 survey has been held in the 28 Member states of the European Union and in Albania, Iceland, FYROM, Moldova, Montenegro, Norway, Serbia, Turkey and USA. It covers businesses employing 1 or more people that are active in one of the following sectors (Nace codes):

- B Mining and quarrying;
- C Manufacturing;
- D Electricity, gas, steam and air conditioning supply;
- E Water supply; sewerage, waste management and remediation activities;
- F Construction;
- G Wholesale and retail trade, repair of motor vehicles and motorcycles;
- H Transportation and storage;
- I Accommodation and food service activities;
- J Information and communication;
- K Financial and insurance activities;
- L Real estate activities;
- M Professional, scientific and technical activities.

The survey covers large companies and SMEs; and SMEs have been benchmarked against large companies as it was done in the Flash Eurobarometer 342.

All interviews were carried using the TNS e-Call centre (our centralised CATI system). The sample was selected from an international business database, with some additional sample from local sources in countries where necessary.

Quotas were applied on both company size and sectors. These quotas were adjusted according to the country's universe but were also reasoned in order to ensure that the sample was large enough in every cell.

| | COUNTRIES | INSTITUTES | N° INTERVIEWS | DATES FIELDWORK | | Businesses 1+ | PROPORTION EU28 |
|---|---|---|---|---|---|---|---|
| BE | Belgium | TNS Dimarso | 500 | 01/09/15 | 18/09/15 | 468,652 | 2.38% |
| BG | Bulgaria | TNS BBSS | 501 | 01/09/15 | 18/09/15 | 279,614 | 1.42% |
| CZ | Czech Rep. | TNS Aisa | 500 | 01/09/15 | 18/09/15 | 920,722 | 4.68% |
| DK | Denmark | TNS Gallup DK | 500 | 01/09/15 | 18/09/15 | 190,894 | 0.97% |
| DE | Germany | TNS Infratest | 500 | 01/09/15 | 18/09/15 | 1,927,013 | 9.79% |
| EE | Estonia | TNS Emor | 500 | 01/09/15 | 18/09/15 | 48,076 | 0.24% |
| IE | Ireland | IMS Millward Brown | 500 | 01/09/15 | 18/09/15 | 141,717 | 0.72% |
| EL | Greece | TNS ICAP | 500 | 01/09/15 | 18/09/15 | 49,484 | 0.25% |
| ES | Spain | TNS Demoscopia | 500 | 01/09/15 | 18/09/15 | 2,367,950 | 12.03% |
| FR | France | TNS Sofres | 500 | 01/09/15 | 18/09/15 | 2,343,372 | 11.90% |
| HR | Croatia | HENDAL | 502 | 01/09/15 | 18/09/15 | 156,667 | 0.80% |
| IT | Italy | TNS Italia | 500 | 01/09/15 | 18/09/15 | 3,688,052 | 18.73% |
| CY | Rep. Of Cyprus | CYMAR | 200 | 01/09/15 | 18/09/15 | 44,164 | 0.22% |
| LV | Latvia | TNS Latvia | 500 | 01/09/15 | 18/09/15 | 76,655 | 0.39% |
| LT | Lithuania | TNS LT | 500 | 01/09/15 | 18/09/15 | 108,581 | 0.55% |
| LU | Luxembourg | TNS Dimarso | 200 | 01/09/15 | 18/09/15 | 26,488 | 0.13% |
| HU | Hungary | TNS Hoffmann | 503 | 01/09/15 | 18/09/15 | 507,749 | 2.58% |
| MT | Malta | MISCO | 200 | 01/09/15 | 18/09/15 | 43,297 | 0.22% |
| NL | Netherlands | TNS NIPO | 500 | 01/09/15 | 18/09/15 | 687,791 | 3.49% |
| AT | Austria | TNS Austria | 500 | 01/09/15 | 18/09/15 | 286,334 | 1.45% |
| PL | Poland | TNS OBOP | 501 | 01/09/15 | 18/09/15 | 1,407,090 | 7.15% |
| PT | Portugal | TNS Euroteste | 500 | 01/09/15 | 18/09/15 | 710,382 | 3.61% |
| RO | Romania | TNS CSOP | 500 | 01/09/15 | 18/09/15 | 426,134 | 2.16% |
| SI | Slovenia | RM PLUS | 507 | 01/09/15 | 18/09/15 | 109,188 | 0.55% |
| SK | Slovakia | TNS AISA Slovakia | 500 | 01/09/15 | 18/09/15 | 386,735 | 1.96% |
| FI | Finland | TNS Gallup Oy | 500 | 01/09/15 | 18/09/15 | 208,736 | 1.06% |
| SE | Sweden | TNS Sifo | 500 | 01/09/15 | 18/09/15 | 585,723 | 2.97% |
| UK | United Kingdom | TNS UK | 500 | 01/09/15 | 18/09/15 | 1,492,015 | 7.58% |
| | | TOTAL EU28 | 13,114 | 1/09/15 | 18/09/15 | 19,689,275 | 100%* |
| TR | Turkey | TNS Piar | 300 | 01/09/15 | 18/09/15 | 57,006 | |
| MK | Former Yugoslav Republic of Macedonia | TNS BRIMA | 200 | 01/09/15 | 18/09/15 | 31,278 | |
| ME | Montenegro | TNS Medium Gallup | 103 | 01/09/15 | 18/09/15 | 21,583 | |
| RS | Serbia | TNS Medium Gallup | 200 | 01/09/15 | 18/09/15 | 49,579 | |
| AL | Albania | TNS BBSS | 100 | 01/09/15 | 18/09/15 | 88,741 | |
| IS | Iceland | Capacent | 200 | 01/09/15 | 18/09/15 | 11,640 | |
| NO | Norway | TNS Gallup Norway | 300 | 01/09/15 | 18/09/15 | 249,638 | |
| MD | Moldova | IMAS-INC SRL | 103 | 01/09/15 | 18/09/15 | 372,112 | |
| US | United States of America | TNS CUSTOM RESEARCH | 400 | 01/09/15 | 18/09/15 | 18,477,363 | |

Readers are reminded that survey results are estimations, the accuracy of which, everything being equal, rests upon the sample size and upon the observed percentage. With samples of about 1,000 interviews, the real percentages vary within the following confidence limits:

Statistical Margins due to the sampling process

(at the 95% level of confidence)

*various sample sizes are in rows* *various observed results are in columns*

| | 5% | 10% | 15% | 20% | 25% | 30% | 35% | 40% | 45% | 50% | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | 95% | 90% | 85% | 80% | 75% | 70% | 65% | 60% | 55% | 50% | |
| N=50 | 6,0 | 8,3 | 9,9 | 11,1 | 12,0 | 12,7 | 13,2 | 13,6 | 13,8 | 13,9 | N=50 |
| N=500 | 1,9 | 2,6 | 3,1 | 3,5 | 3,8 | 4,0 | 4,2 | 4,3 | 4,4 | 4,4 | N=500 |
| N=1000 | 1,4 | 1,9 | 2,2 | 2,5 | 2,7 | 2,8 | 3,0 | 3,0 | 3,1 | 3,1 | N=1000 |
| N=1500 | 1,1 | 1,5 | 1,8 | 2,0 | 2,2 | 2,3 | 2,4 | 2,5 | 2,5 | 2,5 | N=1500 |
| N=2000 | 1,0 | 1,3 | 1,6 | 1,8 | 1,9 | 2,0 | 2,1 | 2,1 | 2,2 | 2,2 | N=2000 |
| N=3000 | 0,8 | 1,1 | 1,3 | 1,4 | 1,5 | 1,6 | 1,7 | 1,8 | 1,8 | 1,8 | N=3000 |
| N=4000 | 0,7 | 0,9 | 1,1 | 1,2 | 1,3 | 1,4 | 1,5 | 1,5 | 1,5 | 1,5 | N=4000 |
| N=5000 | 0,6 | 0,8 | 1,0 | 1,1 | 1,2 | 1,3 | 1,3 | 1,4 | 1,4 | 1,4 | N=5000 |
| N=6000 | 0,6 | 0,8 | 0,9 | 1,0 | 1,1 | 1,2 | 1,2 | 1,2 | 1,3 | 1,3 | N=6000 |
| N=7000 | 0,5 | 0,7 | 0,8 | 0,9 | 1,0 | 1,1 | 1,1 | 1,1 | 1,2 | 1,2 | N=7000 |
| N=7500 | 0,5 | 0,7 | 0,8 | 0,9 | 1,0 | 1,0 | 1,1 | 1,1 | 1,1 | 1,1 | N=7500 |
| N=8000 | 0,5 | 0,7 | 0,8 | 0,9 | 0,9 | 1,0 | 1,0 | 1,1 | 1,1 | 1,1 | N=8000 |
| N=9000 | 0,5 | 0,6 | 0,7 | 0,8 | 0,9 | 0,9 | 1,0 | 1,0 | 1,0 | 1,0 | N=9000 |
| N=10000 | 0,4 | 0,6 | 0,7 | 0,8 | 0,8 | 0,9 | 0,9 | 1,0 | 1,0 | 1,0 | N=10000 |
| N=11000 | 0,4 | 0,6 | 0,7 | 0,7 | 0,8 | 0,9 | 0,9 | 0,9 | 0,9 | 0,9 | N=11000 |
| N=12000 | 0,4 | 0,5 | 0,6 | 0,7 | 0,8 | 0,8 | 0,9 | 0,9 | 0,9 | 0,9 | N=12000 |
| N=13000 | 0,4 | 0,5 | 0,6 | 0,7 | 0,7 | 0,8 | 0,8 | 0,8 | 0,9 | 0,9 | N=13000 |
| N=14000 | 0,4 | 0,5 | 0,6 | 0,7 | 0,7 | 0,8 | 0,8 | 0,8 | 0,8 | 0,8 | N=14000 |
| N=15000 | 0,3 | 0,5 | 0,6 | 0,6 | 0,7 | 0,7 | 0,8 | 0,8 | 0,8 | 0,8 | N=15000 |
| | 5% | 10% | 15% | 20% | 25% | 30% | 35% | 40% | 45% | 50% | |
| | 95% | 90% | 85% | 80% | 75% | 70% | 65% | 60% | 55% | 50% | |

## QUESTIONNAIRE

*Q1: ROTATE ITEMS 1 TO 8 (M)*
*Q1: ITEM 10 SINGLE CODE: (M)*

**Q1 What actions is your company undertaking to be more resource efficient?**

*(READ OUT – MULTIPLE ANSWERS POSSIBLE)*

| | |
|---|---|
| Saving water | 1, |
| Saving energy | 2, |
| Using predominantly renewable energy (e.g. including own production through solar panels, etc.) | 3, |
| Saving materials | 4, |
| Minimising waste | 5, |
| Selling your scrap material to another company | 6, |
| Recycling, by reusing material or waste within the company | 7, |
| Designing products that are easier to maintain, repair or reuse (N) | 8, |
| Other (SP.) | 9, |
| None (SP.) | 10 |
| DK/NA | 11 |

*FL381 Q2B TREND MODIFIED*

*Q2: ROTATE ITEMS 1 TO 8 (M)*
*Q2: ITEM 10 SINGLE CODE (M)*

**Q2 Over the next two years, what are the additional resource efficiency actions that your company is planning to implement?**

*(READ OUT – MULTIPLE ANSWERS POSSIBLE)*

| | |
|---|---|
| Save water | 1, |
| Save energy | 2, |
| Use predominantly renewable energy (e.g. including own production through solar panels, etc.) | 3, |
| Save materials | 4, |
| Minimise waste | 5, |
| Sell your scrap material to another company | 6, |
| Recycle, by reusing material or waste within the company | 7, |
| Design products that are easier to maintain, repair or reuse (N) | 8, |
| Other (SP.) | 9, |
| None (SP.) | 10 |
| DK/NA | 11 |

*FL381 Q3B TREND MODIFIED*

***ASK Q3 TO Q6 IF CODE 1 TO 8 IN Q1, OTHERS GO TO Q7 (N)***

*Q3: ROTATE ITEMS 1 TO 8*
*Q3: ITEM 10 SINGLE CODE*

**Q3 What are the main reasons why your company is taking actions to be more resource efficient?**

*(READ OUT – MAX. 3 ANSWERS)*

| | |
|---|---|
| Financial and fiscal incentives or other forms of public support | 1, |
| Anticipation of future changes in legislation | 2, |
| Anticipation of future changes to the standards of products or processes (M) | 3, |
| Demand from customers or providers | 4, |
| Creation of a competitive advantage or business opportunity | 5, |
| Catching up with main competitors who have already taken action | 6, |
| Cost savings | 7, |
| The environment is one of your company's top priorities (M) | 8, |
| Other (SP.) | 9, |
| None (SP.) | 10 |
| DK/NA | 11 |

*FL381 Q4B TREND MODIFIED*

**Q4** **What impact have the undertaken resource efficiency actions had on the production costs over the past two years? The production costs have... (M)**

*(READ OUT – ONE ANSWER ONLY)*

| | |
|---|---|
| Significantly decreased (M) | 1 |
| Slightly decreased (M) | 2 |
| Slightly increased (M) | 3 |
| Significantly increased (M) | 4 |
| Not changed (SP.) (M) | 5 |
| DK/NA | 6 |

*FL381 Q5 TREND MODIFIED*

**Q5** **Over the past two years, how much have you invested on average per year to be more resource efficient?**

*(READ OUT – ONE ANSWER ONLY)*

| | |
|---|---|
| Nothing (N) | 1 |
| Less than 1% of annual turnover | 2 |
| 1% - 5% of annual turnover | 3 |
| 6% - 10% of annual turnover | 4 |
| 11% - 30% of annual turnover | 5 |
| More than 30% of annual turnover (M) | 6 |
| DK/NA | 7 |

*FL381 Q6 TREND MODIFIED*

***ASK Q6 IF CODE 2 TO 6 IN Q5***

**Q6** **Overall, how satisfied or dissatisfied are you with the return on the investments you have made on resource efficiency? (M)**

*(READ OUT – ONE ANSWER ONLY)*

| | |
|---|---|
| Very satisfied | 1 |
| Fairly satisfied | 2 |
| Fairly dissatisfied | 3 |
| Very dissatisfied | 4 |
| DK/NA | 5 |

*FL381 Q7 TREND MODIFIED*

***ASK ALL***

**Q7** **In the last two years, did your company bid for a public procurement tender that included environmental requirements? (M)**

*(READ OUT – ONE ANSWER ONLY)*

| | |
|---|---|
| Yes, successfully | 1 |
| Yes, unsuccessfully | 2 |
| Yes, but outcome is unknown | 3 |
| No | 4 |
| DK/NA | 5 |

*FL381 Q9 TREND MODIFIED*

***ASK Q8a IF CODE 1 TO 3 IN Q7 (M)***

**Q8a** **Did your company experience any difficulties when bidding for a public procurement tender that included environmental requirements?**

*(READ OUT – ONE ANSWER ONLY)*

| | |
|---|---|
| Yes | 1 |
| No | 2 |
| DK/NA | 3 |

*FL381 Q10A*

***ASK Q8b IF CODE 4 IN Q7 (M)***

*Q8b: ROTATE ITEMS 1 TO 6 (M)*

**Q8b** **Why did your company not apply for a public procurement tender that included environmental requirements?**

*(READ OUT – MULTIPLE ANSWERS POSSIBLE)*

| | |
|---|---|
| You didn't even try to bid because you assumed it was too complicated (M) | 1, |
| You have never been confronted with such a tender (M) | 2, |
| The costs were too high | 3, |
| Too much paperwork to be submitted | 4, |
| Technical tests of the environmental performance or functionalities of your products or services were too complicated to obtain (M) | 5, |
| The costs of the technical tests of the environmental performance or functionalities of your products or services were too high (N) | 6, |
| Other (SP.) | 7, |
| DK/NA | 8 |

*FL381 Q10B TREND MODIFIED*

***ASK Q9 IF CODE 1 IN Q8A (M)***

*Q9: ROTATE ITEMS 1 TO 3 (M)*

**Q9** **What was the most prominent difficulty that you faced when bidding for a public procurement tender with environmental requirements?**

*(READ OUT – ONE ANSWER ONLY)*

| | |
|---|---|
| Costs | 1 |
| Technical tests of the environmental performance or functionalities of your products or services (M) | 2 |
| Too much paperwork to be submitted | 3 |
| Other | 4 |
| DK/NA | 5 |

*FL381 Q11*

***ASK Q10 IF CODE 1 TO 8 IN Q1 (M)***

*Q10: ROTATE ITEMS 1 TO 3*

**Q10** **Which type of support does your company rely on in its efforts to be more resource efficient?**

*(READ OUT – MULTIPLE ANSWERS POSSIBLE)*

| | |
|---|---|
| Its own financial resources | 1, |
| Its own technical expertise | 2, |
| External support | 3, |
| Other (SP.) | 4, |
| DK/NA | 5 |

*FL381 Q12*

***ASK Q11 IF CODE 3 IN Q10 (M)***

*Q11: ROTATE ITEMS 1 TO 6 (M)*

**Q11 More precisely, which type of external support is it?**

*(READ OUT – MULTIPLE ANSWERS POSSBILE)*

| | |
|---|---|
| Public funding such as grants, guarantees or loans (M) | 1, |
| Private funding from a bank, investment company or venture capital fund (M) | 2, |
| Private funding from friends and relatives (M) | 3, |
| Advice or other non-financial assistance from public administration | 4, |
| Advice or other non-financial assistance from private consulting and audit companies | 5, |
| Advice or other non-financial assistance from business associations | 6, |
| Other (SP.) | 7, |
| DK/NA | 8 |

*FL381 Q13 TREND MODIFIED*

***ASK Q12 IF CODE 1 TO 8 IN Q1***

*Q12: ROTATE ITEMS 1 TO 8 (M)*
*Q12: ITEM 10 SINGLE CODE (M)*

**Q12 Did your company encounter any of the following difficulties when trying to set up resource efficiency actions?**

*(READ OUT – MULTIPLE ANSWERS POSSIBLE)*

| | |
|---|---|
| Complexity of administrative or legal procedures | 1, |
| Difficulty to adapt environmental legislation to your company (M) | 2, |
| Technical requirements of the legislation not being up to date | 3, |
| Difficulty in choosing the right resource efficiency actions for your company | 4, |
| Cost of environmental actions | 5, |
| Lack of specific environmental expertise | 6, |
| Lack of supply of required materials, parts, products or services (N) | 7, |
| Lack of demand for resource efficient products or services (N) | 8, |
| Other (SP.) | 9, |
| None (SP.) | 10 |
| DK/NA | 11 |

*FL381 Q15 TREND MODIFIED*

***ASK ALL***

*Q13: ROTATE ITEMS 1 TO 8 (M)*
*Q13: ITEM 10 SINGLE CODE (M)*

**Q13 Which of the following would help your company the most to be more resource efficient?**

*(READ OUT – MAX. 3 ANSWERS)*

| | |
|---|---|
| A tool to self-assess how resource efficient your company is with respect to other companies (M) | 1, |
| Consultancy on how to improve resource efficiency in your company (M) | 2, |
| Grants or subsidies | 3, |
| Advice on funding possibilities and financial planning for resource efficiency investments (M) | 4, |
| Demonstration of new technologies or processes to improve resource efficiency | 5, |
| Database with case studies that show the benefits of resource efficiency for companies | 6, |
| Better cooperation between companies across sectors so that new processes to re-use waste and by-products can be developed (M) | 7, |
| Abolition of legislative obstacles to the use of waste and by-products (N) | 8, |
| Other (SP.) | 9, |
| None (SP.) | 10 |
| DK/NA | 11 |

*FL381 Q16 TREND MODIFIED*

**Green products and services are those with a predominant function of reducing environmental risk and minimise pollution and resources. For the purpose of this survey, this may also include products with environmental features (e.g. organically produced, eco-labelled, with significant recycled content, or eco-designed...) (M)**

**Q14 Does your company offer green products or services?**

*(READ OUT – ONE ANSWER ONLY)*

| | |
|---|---|
| Yes | 1 |
| No but you are planning to do so in the next 2 years (M) | 2 |
| No and you are not planning to do so (M) | 3 |
| DK/NA | 4 |

*FL381 Q17*

***ASK Q15 TO Q18 IF CODE 1 IN Q14 (M)***

**Q15 How much did these green products or services represent in your annual turnover of the latest available fiscal year? (M)**

*(READ OUT – ONE ANSWER ONLY)*

| | |
|---|---|
| Up to 5% (M) | 1 |
| 6% - 10% (M) | 2 |
| 11% - 30% (M) | 3 |
| 31% - 50% (M) | 4 |
| 51% - 75% (M) | 5 |
| More than 75% (M) | 6 |
| DK/NA | 7 |

*FL381 Q20 TREND MODIFIED*

**Q16 For how long has your company been selling green products or services?**

*(READ OUT – ONE ANSWER ONLY)*

| | |
|---|---|
| Less than one year (M) | 1 |
| Between 1 and 3 years (M) | 2 |
| More than 3 years | 3 |
| DK/NA | 4 |

*FL381 Q21 TREND MODIFIED*

**Q17 In terms of turnover over the past 2 years, what were the main markets (countries/ geographical regions) for your green products or services?**

*(DO NOT READ OUT – MULTIPLE ANSWERS POSSIBLE)*

| | |
|---|---|
| National market | 1, |
| European Union (EU-28) + Iceland + Lichtenstein + Norway + Switzerland | 2, |
| Other European countries excluding Russia (M) | 3, |
| Russia | 4, |
| North America countries except USA | 5, |
| USA | 6, |
| South America + Central America excluding Brazil | 7, |
| Brazil | 8, |
| Africa | 9, |
| Middle East | 10, |
| China + Hong Kong + Macau | 11, |
| South Korea | 12, |
| Japan | 13, |
| Other Asian countries | 14, |
| Australia + New Zealand + Oceania | 15, |

*FL381 Q23*

*Q18: ROTATE ITEMS 1 TO 3 (M)*

**Q18 What type of support does your company rely on for the production of its green products or services? (M)**

*(READ OUT – MULTIPLE ANSWERS POSSIBLE)*

| | |
|---|---|
| Its own financial resources | 1, |
| Its own technical expertise | 2, |
| External support | 3, |
| Other (SP.) | 4, |
| DK/NA | 5 |

*FL381 Q24*

***ASK Q19 IF CODE 3 IN Q18 (M)***

*Q19: ROTATE ITEMS 1 TO 6 (M)*

**Q19 Which type of external support does your company get for the production of its green products or services?**

*(READ OUT – MULTIPLE ANSWERS POSSIBLE)*

| | |
|---|---|
| Public funding such as grants, guarantees or loans (M) | 1, |
| Private funding from a bank, investment company or venture capital fund (M) | 2, |
| Private funding from friends or relatives (M) | 3, |
| Advice or other non-financial assistance from public administration | 4, |
| Advice or other non-financial assistance from private consulting and audit companies | 5, |
| Advice or other non-financial assistance from business associations | 6, |
| Other (SP.) | 7, |
| DK/NA | 8 |

*FL381 Q25 TREND MODIFIED*

***ASK Q20 IF CODE 1 OR 4 IN Q19 (M)***

**Q20 How satisfied or dissatisfied are you with the level of public support for your green products or services? (M)**

*(ONE ANSWER ONLY)*

| | |
|---|---|
| Very satisfied | 1 |
| Fairly satisfied | 2 |
| Fairly dissatisfied | 3 |
| Very dissatisfied | 4 |
| DK/NA | 5 |

*FL381 Q26*

***ASK Q21a IF CODE 1 IN Q14 (M)***

*Q21a: ROTATE ITEMS 1 TO 4 (M)*
*Q21a: ITEM 6 SINGLE CODE*

**Q21a What type of support would help you the most to expand your range of green products or services ?**

*(READ OUT – MAX. 2 ANSWERS)*

| | |
|---|---|
| Financial incentives for developing products, services or new production processes | 1, |
| Assistance with identifying potential markets or customers | 2, |
| Technical support and consultancy for the development of products, services and production processes | 3, |
| Consultancy services for marketing or distribution | 4, |
| Other (SP.) | 5, |
| None (SP.) | 6 |
| DK/NA | 7 |

*FL381 Q27A*

***ASK Q21b IF CODE 2 TO 3 IN Q14***

*Q21b: ROTATE ITEMS 1 TO 4*
*Q21b: ITEM 6 SINGLE CODE*

**Q21b** **What type of support would help you the most to launch your range of green products or services ?**

*(READ OUT – MAX. 2 ANSWERS)*

| | |
|---|---|
| Financial incentives for developing products, services or new production processes | 1, |
| Assistance with identifying potential markets or customers | 2, |
| Technical support and consultancy for the development of products, services and production processes | 3, |
| Consultancy services for marketing or distribution | 4, |
| Other (SP.) | 5, |
| None (SP.) | 6 |
| DK/NA | 7 |

*FL381 Q27B*

***ASK ALL***

**A green job is one that directly deals with information, technologies, or materials that preserves or restores environmental quality. This requires specialised skills, knowledge, training, or experience (e.g. verifying compliance with environmental legislation, monitoring resource efficiency within the company, promoting and selling green products and services).**

**Q22** **In your company, how many of your full time employees, including yourself, work in green jobs some or all of the time?**

*(WRITE DOWN)*

| | | | employees |
|---|---|---|---|

*FL381 Q28*

## TABLES OF RESULTS

**Q1** What actions is your company undertaking to be more resource efficient?
**(ROTATE - MULTIPLE ANSWERS POSSIBLE) (%)**

| | Saving water | | Saving energy | | Using predominantly renewable energy (e.g. including own production through solar panels, etc.) | | Saving materials | | Minimising waste | | Selling your scrap material to another company | | Recycling, by reusing material or waste within the company | | Designing products that are easier to maintain, repair or reuse | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Sept. 2015 | Sept. 2015 - Sept. 2013 | Sept. 2015 | Sept. 2015 - Sept. 2013 | Sept. 2015 | Sept. 2015 - Sept. 2013 | Sept. 2015 | Sept. 2015 - Sept. 2013 | Sept. 2015 | Sept. 2015 - Sept. 2013 | Sept. 2015 | Sept. 2015 - Sept. 2013 | Sept. 2015 | Sept. 2015 - Sept. 2013 | Sept. 2015 | Sept. 2015 - Sept. 2013 |
| EU28 | 44 | -7 | 59 | -8 | 11 | -5 | 54 | -5 | 60 | -7 | 25 | -4 | 40 | -11 | 22 | N.A. |
| BE | 47 | -12 | 64 | -4 | 22 | 1 | 58 | -4 | 73 | -6 | 30 | -2 | 39 | -4 | 32 | N.A. |
| BG | 28 | -3 | 43 | 2 | 3 | -2 | 44 | 6 | 34 | 7 | 20 | -8 | 22 | 2 | 12 | N.A. |
| CZ | 46 | -10 | 67 | -8 | 9 | -1 | 51 | -15 | 65 | -13 | 32 | -4 | 42 | -7 | 26 | N.A. |
| DK | 52 | 19 | 71 | 12 | 8 | -4 | 61 | 16 | 63 | 24 | 39 | 11 | 39 | 17 | 29 | N.A. |
| DE | 32 | -21 | 62 | -12 | 20 | -10 | 45 | -16 | 42 | -26 | 22 | -18 | 38 | -19 | 12 | N.A. |
| EE | 15 | 2 | 30 | 3 | 3 | 0 | 24 | -10 | 19 | 1 | 11 | 4 | 18 | 4 | 9 | N.A. |
| IE | 44 | 1 | 57 | -5 | 12 | -12 | 53 | 7 | 75 | -2 | 32 | 2 | 68 | -13 | 22 | N.A. |
| EL | 29 | -25 | 46 | -23 | 7 | -4 | 44 | -24 | 24 | -17 | 29 | -6 | 35 | -10 | 19 | N.A. |
| ES | 46 | -32 | 64 | -27 | 5 | -8 | 59 | -32 | 51 | -34 | 25 | -9 | 50 | -28 | 19 | N.A. |
| FR | 67 | 13 | 70 | 8 | 8 | 1 | 66 | 25 | 77 | 17 | 23 | 1 | 36 | -5 | 40 | N.A. |
| HR | 51 | 12 | 64 | 0 | 3 | -4 | 53 | 9 | 66 | 12 | 27 | -1 | 33 | -6 | 18 | N.A. |
| IT | 25 | -7 | 37 | -7 | 10 | -7 | 38 | -2 | 59 | -6 | 17 | -1 | 25 | -15 | 10 | N.A. |
| CY | 21 | -17 | 51 | 6 | 11 | 1 | 47 | 13 | 39 | 15 | 21 | 3 | 32 | -7 | 15 | N.A. |
| LV | 41 | -10 | 61 | -12 | 6 | 1 | 58 | -3 | 38 | -11 | 17 | -5 | 16 | -7 | 19 | N.A. |
| LT | 45 | -5 | 50 | -11 | 4 | -5 | 46 | -9 | 33 | -1 | 24 | -3 | 12 | -7 | 13 | N.A. |
| LU | 43 | -6 | 50 | -19 | 11 | 2 | 53 | -8 | 65 | -5 | 32 | 8 | 38 | -14 | 14 | N.A. |
| HU | 44 | -8 | 59 | -12 | 7 | 0 | 49 | -4 | 48 | 2 | 20 | -4 | 19 | -1 | 14 | N.A. |
| MT | 47 | 5 | 64 | -12 | 16 | 1 | 60 | 10 | 75 | 15 | 28 | -2 | 59 | 15 | 31 | N.A. |
| NL | 29 | 2 | 59 | -8 | 26 | -4 | 57 | -8 | 63 | -3 | 34 | 6 | 45 | -10 | 24 | N.A. |
| AT | 39 | -17 | 67 | -13 | 26 | -8 | 57 | -6 | 61 | -14 | 30 | 6 | 47 | -13 | 31 | N.A. |
| PL | 52 | 1 | 64 | 0 | 5 | -5 | 64 | 8 | 54 | 6 | 27 | -3 | 31 | 3 | 16 | N.A. |
| PT | 66 | -11 | 74 | -16 | 7 | -2 | 74 | -11 | 62 | -11 | 30 | -3 | 63 | -15 | 51 | N.A. |
| RO | 29 | -28 | 37 | -35 | 3 | -5 | 32 | -28 | 26 | -26 | 16 | -3 | 28 | -4 | 12 | N.A. |
| SI | 29 | -3 | 44 | 4 | 13 | 3 | 45 | 18 | 40 | 0 | 20 | 0 | 30 | 11 | 19 | N.A. |
| SK | 62 | -6 | 62 | -12 | 6 | -4 | 56 | -21 | 57 | -22 | 20 | -13 | 30 | -22 | 21 | N.A. |
| FI | 36 | -2 | 63 | -7 | 15 | 1 | 71 | -9 | 64 | -16 | 25 | -9 | 35 | -6 | 30 | N.A. |
| SE | 43 | 14 | 67 | 8 | 30 | 8 | 65 | 7 | 68 | 7 | 40 | 13 | 60 | 4 | 32 | N.A. |
| UK | 57 | -6 | 72 | -7 | 10 | -8 | 64 | -7 | 91 | -3 | 35 | -7 | 74 | -9 | 26 | N.A. |
| AL | 26 | -22 | 35 | -22 | 4 | 2 | 20 | -23 | 18 | -29 | 9 | 8 | 12 | -16 | 5 | N.A. |
| MK | 19 | -22 | 29 | -44 | 2 | -3 | 25 | -28 | 24 | -27 | 10 | -2 | 17 | 2 | 4 | N.A. |
| ME | 61 | 45 | 68 | 26 | 4 | 0 | 52 | 33 | 54 | 10 | 24 | 6 | 11 | 0 | 11 | N.A. |
| RS | 34 | 6 | 53 | 6 | 11 | 5 | 41 | 11 | 33 | 5 | 27 | 6 | 21 | -2 | 10 | N.A. |
| TR | 58 | -6 | 67 | -10 | 9 | 4 | 82 | 17 | 61 | 3 | 43 | 4 | 46 | 8 | 46 | N.A. |
| IS | 26 | -7 | 49 | -13 | 29 | 6 | 65 | -8 | 72 | 6 | 38 | 2 | 53 | -3 | 23 | N.A. |
| MD | 52 | N.A. | 71 | N.A. | 5 | N.A. | 48 | N.A. | 26 | N.A. | 16 | N.A. | 30 | N.A. | 16 | N.A. |
| NO | 13 | -4 | 30 | -34 | 21 | -13 | 34 | -26 | 51 | -20 | 20 | -7 | 39 | -21 | 14 | N.A. |
| US | 51 | -11 | 66 | -9 | 5 | -21 | 58 | -21 | 79 | -9 | 43 | 2 | 64 | -19 | 34 | N.A. |

**Q1** What actions is your company undertaking to be more resource efficient?
**(ROTATE - MULTIPLE ANSWERS POSSIBLE) (%)**

| | Other (SP.) | | None (SP.) | | Don't know | Many actions | | Some actions | | Few actions | | No action | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 |
| EU28 | 2 | -1 | 13 | 7 | 0 | 30 | -5 | 29 | -3 | 28 | 2 | 13 | 7 |
| BE | 0 | 0 | 9 | 6 | 0 | 38 | 2 | 33 | -2 | 19 | -7 | 9 | 6 |
| BG | 2 | -1 | 22 | 11 | 0 | 13 | 4 | 23 | 3 | 42 | -16 | 22 | 11 |
| CZ | 1 | 0 | 12 | 8 | 0 | 35 | -3 | 30 | -7 | 23 | 3 | 12 | 8 |
| DK | 2 | -1 | 7 | -7 | 1 | 35 | 21 | 35 | 5 | 22 | -20 | 7 | -7 |
| DE | 3 | 3 | 11 | 7 | 1 | 21 | -21 | 29 | -6 | 38 | 20 | 11 | 7 |
| EE | 2 | -2 | 42 | 5 | 1 | 6 | 3 | 13 | 0 | 37 | -8 | 42 | 5 |
| IE | 2 | 2 | 4 | 4 | 0 | 34 | -3 | 37 | 5 | 26 | -4 | 4 | 4 |
| EL | 0 | 0 | 25 | 18 | 0 | 19 | -6 | 25 | -19 | 31 | 8 | 25 | 18 |
| ES | 0 | -8 | 13 | 11 | 1 | 32 | -32 | 26 | -5 | 29 | 25 | 13 | 11 |
| FR | 0 | -7 | 6 | -5 | 1 | 41 | 15 | 39 | 9 | 13 | -18 | 6 | -5 |
| HR | 2 | 0 | 7 | 6 | 1 | 24 | 14 | 41 | -9 | 28 | -10 | 7 | 6 |
| IT | 3 | 1 | 18 | 9 | 0 | 16 | -3 | 22 | -8 | 44 | 2 | 18 | 9 |
| CY | 1 | 1 | 21 | 0 | 0 | 17 | 3 | 26 | 6 | 37 | -5 | 21 | 0 |
| LV | 1 | -3 | 21 | 12 | 0 | 17 | -1 | 30 | -16 | 31 | 4 | 21 | 12 |
| LT | 6 | 6 | 25 | 8 | 3 | 18 | -2 | 28 | -1 | 26 | -6 | 25 | 8 |
| LU | 3 | -1 | 10 | 6 | 0 | 30 | -2 | 27 | -12 | 33 | 10 | 10 | 6 |
| HU | 0 | -2 | 18 | 12 | 0 | 18 | 1 | 30 | -3 | 34 | -10 | 18 | 12 |
| MT | 1 | -1 | 6 | -2 | 0 | 40 | 13 | 36 | -2 | 18 | -7 | 6 | -2 |
| NL | 2 | 0 | 11 | 4 | 0 | 34 | 2 | 31 | -4 | 25 | 0 | 11 | 4 |
| AT | 1 | -1 | 9 | 4 | 0 | 39 | -6 | 29 | -5 | 23 | 7 | 9 | 4 |
| PL | 2 | -1 | 17 | 11 | 1 | 30 | 8 | 31 | 0 | 21 | -17 | 17 | 11 |
| PT | 1 | -1 | 5 | 1 | 1 | 50 | -10 | 31 | 2 | 14 | 7 | 5 | 1 |
| RO | 2 | -1 | 35 | 26 | 3 | 15 | -10 | 18 | -12 | 30 | -5 | 35 | 26 |
| SI | 4 | 0 | 21 | 8 | 1 | 22 | 16 | 20 | -5 | 36 | -19 | 21 | 8 |
| SK | 1 | 0 | 8 | 1 | 1 | 27 | -24 | 36 | 10 | 28 | 12 | 8 | 1 |
| FI | 2 | -2 | 10 | 4 | 0 | 29 | -5 | 36 | -4 | 24 | 5 | 10 | 4 |
| SE | 1 | -3 | 12 | 5 | 0 | 50 | 21 | 22 | -11 | 16 | -9 | 12 | 5 |
| UK | 3 | 2 | 3 | 3 | 0 | 51 | -4 | 32 | -3 | 13 | 3 | 3 | 3 |
| AL | 0 | 0 | 37 | 20 | 4 | 2 | -8 | 17 | -16 | 41 | 1 | 37 | 20 |
| MK | 2 | 2 | 43 | 30 | 0 | 2 | -10 | 23 | -10 | 33 | -9 | 43 | 30 |
| ME | 3 | -4 | 9 | -3 | 0 | 24 | 20 | 34 | 19 | 33 | -36 | 9 | -3 |
| RS | 2 | -6 | 15 | 4 | 0 | 10 | 3 | 30 | 8 | 44 | -16 | 15 | 4 |
| TR | 0 | 0 | 9 | 7 | 0 | 49 | 20 | 27 | -13 | 14 | -14 | 9 | 7 |
| IS | 0 | -3 | 5 | 1 | 5 | 35 | 0 | 31 | -6 | 24 | 4 | 5 | 1 |
| MD | 7 | N.A. | 10 | N.A. | 0 | 14 | N.A. | 36 | N.A. | 39 | N.A. | 10 | N.A. |
| NO | 2 | 2 | 22 | 19 | 4 | 17 | -11 | 24 | -16 | 32 | 3 | 22 | 19 |
| US | 2 | 1 | 5 | 4 | 1 | 47 | -9 | 28 | -3 | 20 | 9 | 5 | 4 |

**Q2** Over the next two years, what are the additional resource efficiency actions that your company is planning to implement ?
**(ROTATE - MULTIPLE ANSWERS POSSIBLE) (%)**

| | Save water | | Save energy | | Use predominantly renewable energy (e.g. including own production through solar panels, etc.) | | Save materials | | Minimise waste | | Sell your scrap material to another company | | Recycle, by reusing material or waste within the company | | Design products that are easier to maintain, repair or reuse | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 |
| EU28 | 38 | -5 | 50 | -8 | 16 | -4 | 43 | -6 | 47 | -9 | 22 | -3 | 34 | -7 | 21 | N.A. |
| BE | 48 | -1 | 64 | -4 | 32 | 0 | 54 | 4 | 68 | 3 | 29 | 3 | 37 | 3 | 35 | N.A. |
| BG | 33 | 2 | 48 | 0 | 13 | 2 | 45 | 4 | 39 | 6 | 23 | -5 | 21 | 6 | 15 | N.A. |
| CZ | 21 | -31 | 33 | -32 | 7 | -2 | 22 | -41 | 27 | -38 | 13 | -17 | 16 | -28 | 16 | N.A. |
| DK | 27 | 10 | 37 | -1 | 6 | -6 | 31 | 5 | 29 | 9 | 15 | 0 | 16 | 0 | 15 | N.A. |
| DE | 15 | -25 | 31 | -32 | 13 | -16 | 21 | -21 | 19 | -27 | 9 | -22 | 19 | -20 | 8 | N.A. |
| EE | 8 | -2 | 20 | -6 | 4 | 2 | 16 | -5 | 11 | -4 | 9 | 5 | 10 | 0 | 7 | N.A. |
| IE | 51 | 15 | 56 | 8 | 23 | -1 | 47 | 9 | 64 | 17 | 28 | 10 | 56 | 12 | 29 | N.A. |
| EL | 25 | -21 | 45 | -16 | 19 | -5 | 33 | -19 | 21 | -14 | 30 | 0 | 37 | 3 | 25 | N.A. |
| ES | 49 | -33 | 62 | -29 | 14 | -8 | 58 | -33 | 50 | -35 | 31 | -8 | 53 | -28 | 24 | N.A. |
| FR | 63 | 26 | 74 | 26 | 20 | 13 | 56 | 22 | 70 | 25 | 29 | 10 | 46 | 15 | 40 | N.A. |
| HR | 41 | 10 | 51 | 5 | 13 | -8 | 44 | 16 | 50 | 8 | 22 | 0 | 22 | -6 | 17 | N.A. |
| IT | 18 | -6 | 30 | -11 | 11 | -7 | 29 | -4 | 40 | -14 | 11 | -2 | 20 | -7 | 8 | N.A. |
| CY | 5 | -16 | 16 | -18 | 13 | -4 | 8 | -15 | 6 | -3 | 6 | -3 | 8 | -16 | 3 | N.A. |
| LV | 41 | -20 | 56 | -21 | 15 | 1 | 53 | -12 | 39 | -13 | 18 | -15 | 13 | -5 | 19 | N.A. |
| LT | 35 | -10 | 42 | -10 | 4 | -12 | 34 | -13 | 27 | -6 | 20 | -3 | 11 | -5 | 12 | N.A. |
| LU | 27 | -8 | 39 | -7 | 14 | -7 | 23 | -14 | 31 | -5 | 12 | -5 | 17 | -13 | 14 | N.A. |
| HU | 40 | 7 | 49 | 4 | 15 | -3 | 43 | 3 | 40 | 1 | 18 | 3 | 20 | 9 | 11 | N.A. |
| MT | 10 | -31 | 12 | -54 | 22 | -18 | 7 | -44 | 8 | -41 | 4 | -25 | 12 | -31 | 7 | N.A. |
| NL | 21 | -1 | 52 | -2 | 34 | -4 | 40 | 1 | 39 | -7 | 18 | -5 | 29 | -5 | 17 | N.A. |
| AT | 14 | -6 | 27 | -16 | 21 | -11 | 19 | -8 | 22 | -10 | 12 | -3 | 18 | -3 | 15 | N.A. |
| PL | 52 | 13 | 58 | 2 | 12 | -8 | 51 | 5 | 49 | -2 | 27 | -3 | 24 | -9 | 18 | N.A. |
| PT | 56 | -9 | 64 | -8 | 23 | -8 | 59 | -9 | 53 | -7 | 28 | -6 | 55 | -5 | 45 | N.A. |
| RO | 28 | -37 | 38 | -31 | 11 | -6 | 28 | -32 | 28 | -21 | 19 | -7 | 25 | -12 | 13 | N.A. |
| SI | 26 | 6 | 40 | 14 | 15 | 0 | 29 | 9 | 28 | 8 | 15 | 2 | 22 | 8 | 12 | N.A. |
| SK | 56 | 1 | 59 | -2 | 14 | -3 | 53 | -5 | 49 | -11 | 18 | -11 | 23 | -19 | 20 | N.A. |
| FI | 29 | -2 | 45 | -11 | 17 | 1 | 40 | -21 | 43 | -16 | 24 | -6 | 28 | 0 | 20 | N.A. |
| SE | 33 | 12 | 55 | 15 | 30 | 8 | 49 | 12 | 46 | 7 | 35 | 17 | 44 | 10 | 27 | N.A. |
| UK | 62 | 7 | 74 | 2 | 23 | -2 | 70 | 3 | 85 | 6 | 35 | -3 | 74 | 0 | 33 | N.A. |
| AL | 22 | -25 | 28 | -22 | 1 | -15 | 16 | -29 | 17 | -29 | 2 | 1 | 9 | -3 | 2 | N.A. |
| MK | 23 | -28 | 40 | -36 | 7 | -6 | 26 | -28 | 22 | -38 | 8 | -7 | 13 | -10 | 4 | N.A. |
| ME | 37 | -1 | 46 | 9 | 5 | -20 | 30 | -2 | 34 | 4 | 14 | 3 | 25 | 10 | 17 | N.A. |
| RS | 19 | -7 | 26 | -17 | 14 | 2 | 18 | -17 | 21 | -3 | 13 | -11 | 22 | -6 | 8 | N.A. |
| TR | 62 | 1 | 71 | -1 | 25 | 3 | 73 | 1 | 67 | 0 | 42 | -4 | 53 | -1 | 52 | N.A. |
| IS | 35 | -7 | 56 | 0 | 37 | 0 | 70 | -4 | 76 | 2 | 43 | -1 | 58 | 6 | 29 | N.A. |
| MD | 31 | N.A. | 38 | N.A. | 10 | N.A. | 23 | N.A. | 22 | N.A. | 10 | N.A. | 18 | N.A. | 12 | N.A. |
| NO | 5 | 1 | 17 | -11 | 8 | -1 | 14 | -1 | 18 | -9 | 9 | -1 | 16 | -5 | 8 | N.A. |
| US | 44 | -20 | 58 | -9 | 19 | -12 | 52 | -20 | 63 | -15 | 35 | -9 | 50 | -23 | 33 | N.A. |

**Q2** Over the next two years, what are the additional resource efficiency actions that your company is planning to implement ?
**(ROTATE - MULTIPLE ANSWERS POSSIBLE) (%)**

| | Other (SP.) | | None (SP.) | | Don't know | Many actions | | Some actions | | Few actions | | No action | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 |
| EU28 | 3 | -1 | 25 | 8 | 3 | 29 | -4 | 19 | -1 | 24 | -3 | 25 | 8 |
| BE | 0 | -2 | 17 | 4 | 0 | 45 | 13 | 21 | -8 | 16 | -10 | 17 | 4 |
| BG | 2 | 0 | 24 | 17 | 3 | 19 | 7 | 23 | 0 | 31 | -18 | 24 | 17 |
| CZ | 2 | 1 | 54 | 38 | 1 | 15 | -22 | 13 | -12 | 17 | -5 | 54 | 38 |
| DK | 5 | -2 | 44 | 2 | 1 | 15 | 7 | 18 | -1 | 23 | -5 | 44 | 2 |
| DE | 6 | 3 | 39 | 15 | 5 | 11 | -22 | 12 | -12 | 34 | 16 | 39 | 15 |
| EE | 4 | -1 | 54 | 7 | 5 | 5 | 1 | 7 | -2 | 28 | -5 | 54 | 7 |
| IE | 2 | 0 | 15 | -5 | 1 | 40 | 9 | 18 | 5 | 26 | -7 | 15 | -5 |
| EL | 2 | 2 | 29 | 8 | 2 | 22 | -5 | 14 | -13 | 33 | 9 | 29 | 8 |
| ES | 0 | -8 | 18 | 14 | 0 | 41 | -31 | 18 | -4 | 23 | 21 | 18 | 14 |
| FR | 1 | -3 | 13 | -10 | 1 | 47 | 26 | 28 | 9 | 10 | -23 | 13 | -10 |
| HR | 6 | -4 | 20 | 7 | 3 | 22 | 12 | 30 | -6 | 26 | -13 | 20 | 7 |
| IT | 5 | 2 | 26 | 8 | 9 | 11 | -5 | 16 | -2 | 38 | -7 | 26 | 8 |
| CY | 1 | -3 | 65 | 27 | 0 | 3 | -4 | 6 | -8 | 27 | -7 | 65 | 27 |
| LV | 1 | -2 | 33 | 20 | 2 | 25 | -4 | 24 | -13 | 17 | -3 | 33 | 20 |
| LT | 8 | 5 | 32 | 3 | 10 | 15 | -5 | 21 | -5 | 21 | 1 | 32 | 3 |
| LU | 6 | -3 | 36 | 16 | 1 | 18 | -11 | 10 | 4 | 35 | -2 | 36 | 16 |
| HU | 1 | -1 | 28 | 3 | 0 | 19 | 3 | 26 | 9 | 27 | -12 | 28 | 3 |
| MT | 13 | 13 | 32 | 15 | 11 | 5 | -30 | 3 | -15 | 49 | 19 | 32 | 15 |
| NL | 3 | -1 | 25 | 3 | 3 | 25 | -2 | 20 | 4 | 27 | -5 | 25 | 3 |
| AT | 5 | -2 | 48 | 10 | 1 | 13 | -3 | 11 | -7 | 27 | -1 | 48 | 10 |
| PL | 4 | 3 | 24 | 8 | 1 | 30 | 3 | 22 | 4 | 22 | -16 | 24 | 8 |
| PT | 2 | 1 | 16 | 2 | 4 | 48 | -8 | 12 | -2 | 20 | 9 | 16 | 2 |
| RO | 2 | -6 | 37 | 29 | 6 | 18 | -16 | 14 | -13 | 25 | -4 | 37 | 29 |
| SI | 6 | 4 | 33 | -2 | 1 | 15 | 10 | 15 | 1 | 36 | -8 | 33 | -2 |
| SK | 2 | -1 | 18 | -4 | 4 | 27 | -16 | 29 | 14 | 23 | 6 | 18 | -4 |
| FI | 2 | -2 | 31 | 5 | 3 | 26 | -1 | 16 | -12 | 24 | 6 | 31 | 5 |
| SE | 7 | 2 | 26 | -1 | 3 | 38 | 13 | 15 | 7 | 17 | -15 | 26 | -1 |
| UK | 1 | -1 | 9 | 0 | 2 | 61 | 9 | 20 | -5 | 9 | -2 | 9 | 0 |
| AL | 0 | 0 | 45 | 31 | 8 | 1 | -9 | 14 | -17 | 32 | -2 | 45 | 31 |
| MK | 0 | 0 | 36 | 27 | 6 | 5 | -14 | 19 | -18 | 34 | 0 | 36 | 27 |
| ME | 2 | 1 | 35 | 30 | 2 | 16 | 10 | 25 | 13 | 22 | -52 | 35 | 30 |
| RS | 7 | 6 | 34 | 15 | 6 | 8 | 1 | 12 | -11 | 40 | -11 | 34 | 15 |
| TR | 1 | 1 | 9 | 5 | 2 | 56 | 12 | 19 | -10 | 15 | -7 | 9 | 5 |
| IS | 0 | -1 | 6 | 2 | 5 | 44 | 1 | 30 | 1 | 14 | -4 | 6 | 2 |
| MD | 23 | N.A. | 11 | N.A. | 11 | 12 | N.A. | 14 | N.A. | 51 | N.A. | 11 | N.A. |
| NO | 9 | -3 | 50 | 7 | 5 | 7 | -1 | 9 | -1 | 30 | -7 | 50 | 7 |
| US | 4 | 3 | 15 | 7 | 5 | 45 | -13 | 16 | -1 | 20 | 5 | 15 | 7 |

**Q3** What are the main reasons why your company is taking actions to be more resource efficient?
**(ROTATE - MAX. 3 ANSWERS) (%)**

***IF CODE 1 TO 8 IN Q1***

| | Financial and fiscal incentives or other forms of public support | | Anticipation of future changes in legislation | | Anticipation of future changes to the standards of products or processes | | Demand from customers or providers | | Creation of a competitive advantage or business opportunity | | Catching up with main competitors who have already taken action | | Cost savings | | The environment is one of your company's top priorities | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 |
| EU28 | 17 | -2 | 12 | 2 | 9 | -1 | 24 | 1 | 18 | 0 | 11 | 2 | 68 | 5 | 39 | 11 |
| BE | 36 | 12 | 26 | 12 | 13 | 2 | 25 | -1 | 22 | 1 | 19 | 9 | 65 | 3 | 41 | 10 |
| BG | 14 | 3 | 16 | 4 | 10 | -1 | 12 | 5 | 19 | 13 | 13 | 7 | 66 | 16 | 35 | 11 |
| CZ | 13 | 3 | 16 | 2 | 7 | -6 | 26 | -1 | 18 | -4 | 7 | 1 | 71 | -1 | 45 | 13 |
| DK | 10 | -2 | 8 | 2 | 11 | 4 | 25 | 14 | 35 | 22 | 4 | 0 | 80 | 16 | 35 | 15 |
| DE | 23 | 3 | 13 | 2 | 5 | -1 | 18 | -13 | 17 | -1 | 5 | 2 | 71 | 1 | 32 | 0 |
| EE | 5 | -8 | 4 | 1 | 8 | 6 | 16 | 1 | 22 | 1 | 10 | 2 | 82 | -1 | 24 | 12 |
| IE | 23 | 11 | 19 | -5 | 15 | 6 | 12 | -3 | 12 | -10 | 11 | 6 | 61 | -6 | 41 | 19 |
| EL | 24 | -8 | 6 | -3 | 13 | 5 | 17 | 5 | 26 | 10 | 10 | 2 | 67 | -10 | 42 | 12 |
| ES | 9 | -11 | 11 | 3 | 10 | -3 | 34 | 10 | 16 | -3 | 24 | 7 | 66 | -4 | 35 | 6 |
| FR | 23 | 7 | 17 | 5 | 16 | 2 | 43 | 22 | 20 | 13 | 9 | 4 | 66 | 8 | 36 | 12 |
| HR | 7 | 2 | 16 | 1 | 7 | -10 | 12 | 1 | 12 | 2 | 6 | 1 | 71 | 0 | 67 | 6 |
| IT | 11 | -14 | 2 | -4 | 0 | -10 | 8 | -11 | 9 | -16 | 3 | -9 | 72 | 16 | 42 | 25 |
| CY | 28 | 7 | 9 | 5 | 8 | 3 | 8 | 2 | 17 | 6 | 6 | 1 | 68 | 16 | 28 | -20 |
| LV | 10 | -9 | 13 | 3 | 8 | -1 | 21 | 0 | 20 | 7 | 12 | 6 | 67 | 8 | 26 | 0 |
| LT | 25 | -10 | 3 | -4 | 5 | 0 | 13 | 2 | 29 | 11 | 8 | -4 | 75 | 25 | 30 | 11 |
| LU | 13 | 4 | 10 | 2 | 4 | -3 | 21 | -6 | 17 | -2 | 9 | -6 | 57 | 22 | 45 | 6 |
| HU | 12 | -2 | 8 | 2 | 10 | 7 | 20 | -6 | 20 | -5 | 19 | 0 | 71 | 7 | 16 | 3 |
| MT | 20 | 4 | 23 | 9 | 17 | -1 | 7 | -1 | 14 | -16 | 16 | 2 | 79 | 7 | 58 | 14 |
| NL | 32 | -7 | 9 | -5 | 12 | 3 | 22 | 5 | 21 | 4 | 10 | 4 | 67 | -8 | 43 | 15 |
| AT | 22 | -4 | 8 | -1 | 8 | 0 | 23 | -4 | 23 | 14 | 3 | -1 | 65 | -3 | 44 | -3 |
| PL | 12 | 1 | 6 | 1 | 9 | -5 | 34 | 9 | 22 | 1 | 26 | 10 | 46 | -5 | 41 | 11 |
| PT | 18 | 3 | 12 | -3 | 8 | -2 | 25 | 7 | 26 | 7 | 20 | 5 | 72 | 0 | 57 | 21 |
| RO | 13 | 1 | 9 | -10 | 13 | 3 | 19 | 6 | 28 | 18 | 10 | 3 | 69 | 4 | 30 | 5 |
| SI | 9 | -12 | 9 | 1 | 8 | 1 | 15 | 0 | 25 | 15 | 9 | 4 | 63 | 8 | 51 | 3 |
| SK | 8 | -1 | 12 | 0 | 6 | -1 | 18 | -4 | 9 | -1 | 7 | -2 | 62 | 2 | 42 | 2 |
| FI | 20 | -1 | 14 | 0 | 16 | 4 | 36 | -2 | 34 | 3 | 7 | 4 | 66 | -9 | 29 | 15 |
| SE | 16 | 5 | 14 | 4 | 16 | 11 | 26 | -4 | 35 | 5 | 9 | 5 | 62 | 5 | 36 | 5 |
| UK | 26 | 8 | 24 | 7 | 11 | 4 | 20 | -3 | 12 | 0 | 7 | 3 | 75 | 14 | 44 | 8 |
| AL | 4 | -15 | 0 | -25 | 0 | -16 | 8 | -22 | 14 | -2 | 14 | 0 | 65 | 28 | 52 | 33 |
| MK | 28 | 13 | 11 | 3 | 10 | 1 | 10 | -14 | 9 | -21 | 24 | 7 | 55 | -5 | 60 | 14 |
| ME | 10 | -19 | 8 | 6 | 11 | -13 | 13 | -9 | 13 | -28 | 8 | -10 | 68 | 50 | 51 | 39 |
| RS | 21 | 9 | 10 | 1 | 9 | 5 | 12 | 8 | 7 | -11 | 8 | -3 | 69 | 22 | 34 | 15 |
| TR | 26 | 3 | 20 | 4 | 19 | 0 | 43 | 2 | 29 | 3 | 18 | 13 | 52 | 3 | 22 | 3 |
| IS | 9 | -4 | 11 | 6 | 8 | 2 | 16 | 5 | 14 | 2 | 9 | -4 | 64 | 7 | 42 | 15 |
| MD | 18 | N.A. | 17 | N.A. | 9 | N.A. | 26 | N.A. | 19 | N.A. | 8 | N.A. | 78 | N.A. | 27 | N.A. |
| NO | 17 | 3 | 6 | 1 | 10 | -1 | 19 | -1 | 18 | 1 | 7 | 2 | 48 | -7 | 28 | -4 |
| US | 23 | -6 | 11 | -3 | 17 | 3 | 21 | 4 | 18 | -10 | 10 | 2 | 59 | 0 | 41 | 1 |

**Q3** What are the main reasons why your company is taking actions to be more resource efficient? **(ROTATE - MAX. 3 ANSWERS) (%)**

***IF CODE 1 TO 8 IN Q1***

| | Other (SP.) | | None (SP.) | | Don't know |
|---|---|---|---|---|---|
| | Sept. 2015 | *Sept.2015 - Sept. 2013* | Sept. 2015 | *Sept.2015 - Sept. 2013* | Sept. 2015 |
| EU28 | 2 | *-1* | 4 | *1* | 1 |
| BE | 1 | *0* | 4 | *1* | 1 |
| BG | 0 | *-3* | 2 | *-6* | 1 |
| CZ | 0 | *-2* | 6 | *1* | 1 |
| DK | 3 | *-4* | 4 | *-6* | 1 |
| DE | 1 | *-4* | 9 | *5* | 1 |
| EE | 4 | *-2* | 6 | *6* | 2 |
| IE | 3 | *-5* | 2 | *2* | 2 |
| EL | 0 | *0* | 4 | *3* | 0 |
| ES | 4 | *3* | 4 | *2* | 0 |
| FR | 0 | *-6* | 3 | *-2* | 2 |
| HR | 2 | *-3* | 3 | *2* | 0 |
| IT | 2 | *-2* | 4 | *1* | 1 |
| CY | 2 | *1* | 5 | *3* | 0 |
| LV | 3 | *-1* | 5 | *2* | 1 |
| LT | 5 | *1* | 3 | *-5* | 4 |
| LU | 2 | *-6* | 10 | *8* | 0 |
| HU | 1 | *0* | 10 | *7* | 0 |
| MT | 0 | *-1* | 0 | *-1* | 0 |
| NL | 2 | *-1* | 1 | *1* | 1 |
| AT | 6 | *0* | 7 | *2* | 0 |
| PL | 3 | *2* | 5 | *3* | 2 |
| PT | 2 | *1* | 1 | *-1* | 1 |
| RO | 3 | *3* | 2 | *1* | 0 |
| SI | 3 | *2* | 2 | *1* | 1 |
| SK | 2 | *-3* | 5 | *2* | 3 |
| FI | 1 | *0* | 5 | *4* | 1 |
| SE | 4 | *-3* | 4 | *0* | 2 |
| UK | 0 | *-3* | 4 | *2* | 2 |
| AL | 6 | *6* | 2 | *-3* | 0 |
| MK | 3 | *3* | 1 | *-2* | 1 |
| ME | 0 | *0* | 6 | *6* | 0 |
| RS | 2 | *-3* | 3 | *-1* | 0 |
| TR | 1 | *0* | 0 | *0* | 6 |
| IS | 3 | *-3* | 3 | *3* | 11 |
| MD | 4 | *N.A.* | 0 | *N.A.* | 2 |
| NO | 11 | *6* | 4 | *-2* | 5 |
| US | 5 | *3* | 4 | *0* | 2 |

**Q4** What impact have the undertaken resource efficiency actions had on the production costs over the past two years? The production costs have... **(%)**

***IF CODE 1 TO 8 IN Q1***

| | Significantly decreased | | Slightly decreased | | Slightly increased | | Significantly increased | | Not changed (SP.) | | Don't know | Total 'Decreased production costs' | | Total 'Increased production costs' | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 |
| EU28 | 5 | 0 | 37 | 0 | 16 | -1 | 5 | -1 | 22 | -3 | 15 | 42 | 0 | 21 | -2 |
| BE | 3 | -2 | 39 | -1 | 16 | 2 | 5 | -1 | 25 | -2 | 12 | 42 | -3 | 21 | 1 |
| BG | 6 | 1 | 42 | 2 | 18 | 1 | 2 | -2 | 22 | 2 | 10 | 48 | 3 | 20 | -1 |
| CZ | 4 | -2 | 41 | -3 | 12 | 0 | 3 | 0 | 23 | 0 | 17 | 45 | -5 | 15 | 0 |
| DK | 5 | 1 | 36 | 3 | 10 | 0 | 2 | 2 | 35 | -6 | 12 | 41 | 4 | 12 | 2 |
| DE | 4 | 0 | 41 | 8 | 7 | -9 | 1 | -7 | 26 | 3 | 21 | 45 | 8 | 8 | -16 |
| EE | 2 | -4 | 53 | 16 | 7 | -1 | 1 | 0 | 34 | -1 | 3 | 55 | 12 | 8 | -1 |
| IE | 3 | -2 | 31 | -15 | 25 | 8 | 8 | 4 | 15 | -2 | 18 | 34 | -17 | 33 | 12 |
| EL | 15 | 5 | 50 | 1 | 8 | -4 | 3 | 1 | 15 | -9 | 9 | 65 | 6 | 11 | -3 |
| ES | 13 | 7 | 34 | -6 | 13 | -1 | 7 | 1 | 23 | -5 | 10 | 47 | 1 | 20 | 0 |
| FR | 5 | 3 | 34 | 5 | 24 | 4 | 10 | 2 | 18 | -13 | 9 | 39 | 8 | 34 | 6 |
| HR | 4 | -3 | 47 | 7 | 5 | -5 | 3 | -2 | 27 | 0 | 14 | 51 | 4 | 8 | -7 |
| IT | 4 | -2 | 42 | 4 | 13 | -7 | 1 | -8 | 26 | 7 | 14 | 46 | 2 | 14 | -15 |
| CY | 12 | 2 | 48 | 13 | 8 | -7 | 3 | -3 | 29 | 2 | 0 | 60 | 15 | 11 | -10 |
| LV | 6 | 2 | 38 | -2 | 18 | 0 | 7 | 1 | 22 | -4 | 9 | 44 | 0 | 25 | 1 |
| LT | 3 | 2 | 53 | 6 | 9 | 0 | 0 | -1 | 16 | -8 | 19 | 56 | 8 | 9 | -1 |
| LU | 3 | 2 | 27 | 5 | 30 | 14 | 2 | -4 | 30 | -8 | 8 | 30 | 7 | 32 | 10 |
| HU | 3 | -2 | 47 | -1 | 10 | -4 | 4 | 1 | 24 | 0 | 12 | 50 | -3 | 14 | -3 |
| MT | 3 | 0 | 38 | 4 | 23 | 1 | 3 | -4 | 25 | 5 | 8 | 41 | 4 | 26 | -3 |
| NL | 6 | 4 | 34 | -6 | 14 | -1 | 1 | -2 | 22 | -4 | 23 | 40 | -2 | 15 | -3 |
| AT | 3 | -3 | 32 | -6 | 15 | 1 | 4 | -1 | 21 | 0 | 25 | 35 | -9 | 19 | 0 |
| PL | 6 | 3 | 29 | -7 | 27 | 9 | 9 | 6 | 15 | -14 | 14 | 35 | -4 | 36 | 15 |
| PT | 8 | -4 | 39 | -9 | 16 | 4 | 5 | -3 | 19 | 3 | 13 | 47 | -13 | 21 | 1 |
| RO | 6 | 0 | 54 | 12 | 17 | 2 | 1 | -10 | 12 | -2 | 10 | 60 | 12 | 18 | -8 |
| SI | 6 | -9 | 55 | 17 | 8 | -5 | 2 | -2 | 22 | -4 | 7 | 61 | 8 | 10 | -7 |
| SK | 4 | 2 | 33 | -10 | 14 | -6 | 4 | 0 | 24 | 4 | 21 | 37 | -8 | 18 | -6 |
| FI | 4 | 1 | 50 | 1 | 12 | -8 | 0 | -1 | 22 | 3 | 12 | 54 | 2 | 12 | -9 |
| SE | 2 | -1 | 33 | -4 | 15 | 3 | 3 | 2 | 26 | -2 | 21 | 35 | -5 | 18 | 5 |
| UK | 2 | -1 | 30 | -1 | 21 | 3 | 4 | 1 | 19 | -12 | 24 | 32 | -2 | 25 | 4 |
| AL | 4 | -5 | 20 | -5 | 28 | 9 | 8 | 7 | 28 | 10 | 12 | 24 | -10 | 36 | 16 |
| MK | 0 | -5 | 69 | 13 | 13 | -5 | 0 | -1 | 15 | -3 | 3 | 69 | 8 | 13 | -6 |
| ME | 10 | -5 | 43 | 8 | 13 | -1 | 2 | -20 | 26 | 17 | 6 | 53 | 3 | 15 | -21 |
| RS | 11 | -1 | 35 | -11 | 10 | -5 | 9 | 2 | 31 | 17 | 4 | 46 | -12 | 19 | -3 |
| TR | 16 | 6 | 37 | -5 | 24 | 3 | 15 | 2 | 5 | -2 | 3 | 53 | 1 | 39 | 5 |
| IS | 4 | 0 | 28 | 2 | 9 | -3 | 0 | -5 | 41 | 7 | 18 | 32 | 2 | 9 | -8 |
| MD | 7 | N.A. | 23 | N.A. | 28 | N.A. | 22 | N.A. | 16 | N.A. | 4 | 30 | N.A. | 50 | N.A. |
| NO | 5 | 1 | 23 | -8 | 22 | 5 | 2 | 0 | 34 | 3 | 14 | 28 | -7 | 24 | 5 |
| US | 4 | -3 | 28 | -4 | 24 | 1 | 17 | 11 | 14 | -9 | 13 | 32 | -7 | 41 | 12 |

**Q5** Over the past two years, how much have you invested on average per year to be more resource efficient? **(%)**

***IF CODE 1 TO 8 IN Q1***

| | Less than 1% of annual turnover | | 1 to 5% of annual turnover | | 6 to 10% of annual turnover | | 11 to 30% of annual turnover | | More than 30% of annual turnover | | Don't know |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | Sept. 2015 | Sept 2015 - Sept. 2013 | Sept. 2015 | Sept 2015 - Sept. 2013 | Sept. 2015 | Sept 2015 - Sept. 2013 | Sept. 2015 | Sept 2015 - Sept. 2013 | Sept. 2015 | Sept 2015 - Sept. 2013 | Sept. 2015 |
| EU28 | 50 | 11 | 26 | -7 | 6 | -2 | 2 | -1 | 1 | -1 | 15 |
| BE | 50 | 13 | 28 | -3 | 7 | -5 | 1 | -2 | 0 | -1 | 14 |
| BG | 55 | 11 | 19 | -2 | 8 | 0 | 5 | 2 | 4 | 0 | 9 |
| CZ | 64 | 21 | 22 | -9 | 4 | 1 | 1 | -1 | 0 | 0 | 9 |
| DK | 61 | 8 | 22 | 3 | 4 | 2 | 4 | 2 | 0 | -1 | 9 |
| DE | 38 | 2 | 32 | -1 | 5 | -7 | 2 | -1 | 0 | -2 | 23 |
| EE | 60 | 11 | 21 | -5 | 6 | 2 | 2 | 1 | 3 | 1 | 8 |
| IE | 62 | 17 | 25 | -8 | 5 | -6 | 1 | -2 | 2 | 2 | 5 |
| EL | 46 | -1 | 32 | -3 | 11 | 6 | 1 | -3 | 2 | 1 | 8 |
| ES | 41 | 1 | 32 | -2 | 7 | 2 | 5 | 2 | 1 | 0 | 14 |
| FR | 58 | 10 | 25 | -2 | 6 | 1 | 2 | 1 | 2 | 1 | 7 |
| HR | 60 | 24 | 24 | -7 | 3 | -3 | 3 | -1 | 0 | -1 | 10 |
| IT | 46 | 15 | 21 | -18 | 3 | -6 | 0 | -5 | 0 | -3 | 30 |
| CY | 51 | 22 | 31 | 10 | 11 | 3 | 2 | 1 | 3 | -2 | 2 |
| LV | 63 | 18 | 18 | -9 | 5 | 0 | 1 | -2 | 3 | 2 | 10 |
| LT | 66 | 23 | 22 | -10 | 2 | -3 | 3 | 1 | 1 | -1 | 6 |
| LU | 56 | 24 | 25 | -2 | 8 | 1 | 2 | -2 | 0 | -2 | 9 |
| HU | 59 | 20 | 25 | -11 | 4 | -7 | 1 | -1 | 0 | -1 | 11 |
| MT | 45 | 0 | 30 | 0 | 6 | -3 | 0 | -1 | 2 | 0 | 17 |
| NL | 57 | 19 | 30 | -13 | 5 | -4 | 2 | 1 | 1 | -1 | 5 |
| AT | 48 | 11 | 33 | -1 | 7 | -1 | 0 | -2 | 1 | 0 | 11 |
| PL | 55 | 13 | 23 | -4 | 9 | 1 | 5 | 2 | 0 | -1 | 8 |
| PT | 47 | 12 | 30 | -9 | 7 | -3 | 2 | -2 | 1 | 0 | 13 |
| RO | 46 | 8 | 32 | -6 | 10 | 0 | 3 | -1 | 3 | 1 | 6 |
| SI | 52 | 3 | 31 | 9 | 6 | -2 | 2 | -2 | 0 | -4 | 9 |
| SK | 51 | 18 | 19 | -14 | 9 | -1 | 2 | 0 | 0 | -2 | 19 |
| FI | 54 | 8 | 30 | -3 | 6 | -2 | 4 | 2 | 2 | -1 | 4 |
| SE | 48 | 12 | 33 | -1 | 8 | 0 | 3 | -3 | 1 | -1 | 7 |
| UK | 57 | 11 | 20 | -12 | 6 | 0 | 1 | -1 | 0 | 0 | 16 |
| AL | 17 | -3 | 39 | 23 | 2 | 1 | 12 | 8 | 0 | 0 | 30 |
| MK | 70 | 28 | 18 | -8 | 3 | -12 | 0 | -5 | 1 | 1 | 8 |
| ME | 34 | 14 | 33 | -12 | 11 | -6 | 6 | -4 | 2 | -2 | 14 |
| RS | 42 | 11 | 34 | 0 | 7 | -7 | 4 | -2 | 4 | 1 | 9 |
| TR | 43 | 21 | 29 | -5 | 13 | -2 | 6 | -6 | 3 | -4 | 6 |
| IS | 71 | 16 | 12 | -10 | 2 | 1 | 1 | -3 | 1 | 1 | 13 |
| MD | 37 | N.A. | 17 | N.A. | 9 | N.A. | 12 | N.A. | 9 | N.A. | 16 |
| NO | 54 | -4 | 31 | 8 | 3 | -5 | 1 | 1 | 0 | 0 | 11 |
| US | 47 | 11 | 35 | -1 | 10 | -1 | 5 | 0 | 0 | -4 | 3 |

**Q6** Overall, how satisfied or dissatisfied are you with the return on the investments you have made on resource efficiency? **(%)**

***IF CODE 1 TO 8 IN Q1 + IF CODE 2 TO 6 IN Q5***

| | Very satisfied | | Fairly satisfied | | Fairly dissatisfied | | Very dissatisfied | | Don't know | Total 'Satisfied' | | Total 'Dissatisfied' | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 |
| EU28 | 13 | 1 | 67 | 11 | 13 | 1 | 3 | -1 | 4 | 80 | 12 | 16 | 0 |
| BE | 12 | 0 | 76 | 12 | 8 | -1 | 2 | 0 | 2 | 88 | 12 | 10 | -1 |
| BG | 13 | 7 | 57 | 7 | 26 | 8 | 3 | -2 | 1 | 70 | 14 | 29 | 6 |
| CZ | 7 | 4 | 69 | 7 | 16 | 5 | 1 | -1 | 7 | 76 | 11 | 17 | 4 |
| DK | 22 | -3 | 64 | 21 | 4 | 0 | 0 | -2 | 10 | 86 | 18 | 4 | -2 |
| DE | 15 | -1 | 71 | 12 | 11 | 1 | 0 | -2 | 3 | 86 | 11 | 11 | -1 |
| EE | 12 | 7 | 67 | 5 | 4 | -6 | 1 | 0 | 16 | 79 | 12 | 5 | -6 |
| IE | 16 | 2 | 69 | 3 | 7 | -2 | 3 | 1 | 5 | 85 | 5 | 10 | -1 |
| EL | 8 | 2 | 71 | 11 | 11 | -5 | 2 | -5 | 8 | 79 | 13 | 13 | -10 |
| ES | 21 | 0 | 67 | 4 | 7 | 3 | 2 | 0 | 3 | 88 | 4 | 9 | 3 |
| FR | 11 | 5 | 64 | 11 | 17 | 3 | 5 | 1 | 3 | 75 | 16 | 22 | 4 |
| HR | 7 | -1 | 59 | 13 | 17 | 6 | 5 | -2 | 12 | 66 | 12 | 22 | 4 |
| IT | 5 | -3 | 61 | 12 | 24 | 0 | 6 | -5 | 4 | 66 | 9 | 30 | -5 |
| CY | 11 | 0 | 78 | 16 | 7 | 0 | 0 | -3 | 4 | 89 | 16 | 7 | -3 |
| LV | 8 | 0 | 57 | 10 | 21 | 8 | 7 | 2 | 7 | 65 | 10 | 28 | 10 |
| LT | 7 | -4 | 70 | 11 | 18 | 5 | 2 | 1 | 3 | 77 | 7 | 20 | 6 |
| LU | 17 | 9 | 68 | 14 | 15 | 3 | 0 | -2 | 0 | 85 | 23 | 15 | 1 |
| HU | 15 | 8 | 67 | 13 | 11 | -9 | 5 | 1 | 2 | 82 | 21 | 16 | -8 |
| MT | 12 | 7 | 75 | 20 | 12 | -3 | 0 | -10 | 1 | 87 | 27 | 12 | -13 |
| NL | 22 | 2 | 66 | 7 | 8 | 3 | 0 | -2 | 4 | 88 | 9 | 8 | 1 |
| AT | 21 | -3 | 69 | 13 | 4 | -1 | 1 | 0 | 5 | 90 | 10 | 5 | -1 |
| PL | 5 | 0 | 66 | 8 | 19 | 5 | 2 | -1 | 8 | 71 | 8 | 21 | 4 |
| PT | 8 | -19 | 79 | 40 | 9 | 3 | 1 | -7 | 3 | 87 | 21 | 10 | -4 |
| RO | 10 | 6 | 68 | 4 | 20 | 0 | 0 | -5 | 2 | 78 | 10 | 20 | -5 |
| SI | 14 | -10 | 68 | 11 | 12 | 5 | 1 | -3 | 5 | 82 | 1 | 13 | 2 |
| SK | 5 | -1 | 64 | 12 | 28 | 8 | 1 | -3 | 2 | 69 | 11 | 29 | 5 |
| FI | 13 | 0 | 78 | 16 | 5 | -2 | 1 | -1 | 3 | 91 | 16 | 6 | -3 |
| SE | 9 | -1 | 76 | 18 | 7 | -1 | 2 | 2 | 6 | 85 | 17 | 9 | 1 |
| UK | 21 | 6 | 68 | 9 | 6 | 1 | 1 | 1 | 4 | 89 | 15 | 7 | 2 |
| AL | 1 | -1 | 95 | 38 | 4 | -2 | 0 | -11 | 0 | 96 | 37 | 4 | -13 |
| MK | 8 | -9 | 83 | 17 | 6 | -7 | 0 | -4 | 3 | 91 | 8 | 6 | -11 |
| ME | 14 | 5 | 59 | -10 | 15 | 4 | 10 | 3 | 2 | 73 | -5 | 25 | 7 |
| RS | 19 | 12 | 54 | 21 | 13 | -16 | 8 | -1 | 6 | 73 | 33 | 21 | -17 |
| TR | 18 | 5 | 57 | -7 | 14 | 4 | 8 | -2 | 3 | 75 | -2 | 22 | 2 |
| IS | 19 | 7 | 62 | 19 | 12 | 9 | 0 | 0 | 7 | 81 | 26 | 12 | 9 |
| MD | 8 | N.A. | 41 | N.A. | 30 | N.A. | 15 | N.A. | 6 | 49 | N.A. | 45 | N.A. |
| NO | 15 | 2 | 68 | 13 | 5 | -2 | 3 | 3 | 9 | 83 | 15 | 8 | 1 |
| US | 21 | -8 | 53 | 0 | 14 | 7 | 5 | 1 | 7 | 74 | -8 | 19 | 8 |

**Q7** In the last two years, did your company bid for a public procurement tender that included environmental requirements?

**(%)**

| | Yes, successfully | | Yes, unsuccessfully | | Yes, but outcome is unknown | | No | | Don't know | Total 'Yes' | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept. 2015 | Sept.2015 - Sept. 2013 |
| EU28 | 6 | -1 | 3 | 0 | 2 | 0 | 86 | 1 | 3 | 11 | -1 |
| BE | 7 | 0 | 3 | -1 | 5 | 3 | 83 | 0 | 2 | 15 | 2 |
| BG | 3 | 0 | 3 | 1 | 1 | -1 | 91 | 4 | 2 | 7 | 0 |
| CZ | 7 | -4 | 6 | 2 | 1 | 1 | 86 | 3 | 0 | 14 | -1 |
| DK | 8 | 0 | 4 | 2 | 2 | 1 | 85 | 4 | 1 | 14 | 3 |
| DE | 14 | 6 | 2 | -1 | 1 | 0 | 74 | -10 | 9 | 17 | 5 |
| EE | 4 | 0 | 1 | 1 | 0 | 0 | 95 | 0 | 0 | 5 | 1 |
| IE | 8 | 1 | 4 | 2 | 6 | 3 | 74 | -9 | 8 | 18 | 6 |
| EL | 10 | 7 | 2 | 1 | 0 | -1 | 85 | -9 | 3 | 12 | 7 |
| ES | 5 | 1 | 1 | -1 | 2 | 1 | 92 | 2 | 0 | 8 | 1 |
| FR | 8 | -5 | 5 | 2 | 4 | 2 | 82 | 3 | 1 | 17 | -1 |
| HR | 6 | -1 | 4 | -1 | 1 | -1 | 85 | 3 | 4 | 11 | -3 |
| IT | 3 | -2 | 2 | -1 | 0 | -1 | 94 | 5 | 1 | 5 | -4 |
| CY | 4 | -3 | 2 | 0 | 3 | 0 | 90 | 4 | 1 | 9 | -3 |
| LV | 4 | -2 | 2 | 0 | 0 | -1 | 94 | 5 | 0 | 6 | -3 |
| LT | 4 | -1 | 3 | 0 | 0 | -1 | 91 | 1 | 2 | 7 | -2 |
| LU | 6 | 0 | 3 | -2 | 4 | 0 | 85 | 2 | 2 | 13 | -2 |
| HU | 5 | -3 | 2 | -1 | 2 | 1 | 90 | 4 | 1 | 9 | -3 |
| MT | 0 | -8 | 2 | -1 | 0 | -3 | 93 | 7 | 5 | 2 | -12 |
| NL | 3 | 0 | 2 | -1 | 3 | 2 | 91 | -1 | 1 | 8 | 1 |
| AT | 9 | -2 | 3 | 2 | 2 | 1 | 84 | -2 | 2 | 14 | 1 |
| PL | 4 | -1 | 4 | 1 | 2 | 0 | 89 | 3 | 1 | 10 | 0 |
| PT | 3 | 1 | 3 | 3 | 1 | 0 | 93 | -3 | 0 | 7 | 4 |
| RO | 6 | 1 | 2 | 0 | 0 | -2 | 92 | 2 | 0 | 8 | -1 |
| SI | 4 | -7 | 4 | 0 | 0 | -1 | 91 | 9 | 1 | 8 | -8 |
| SK | 4 | -1 | 2 | -5 | 3 | 1 | 89 | 7 | 2 | 9 | -5 |
| FI | 3 | -5 | 5 | -2 | 1 | -1 | 86 | 6 | 5 | 9 | -8 |
| SE | 8 | -11 | 9 | 1 | 3 | 1 | 76 | 7 | 4 | 20 | -9 |
| UK | 3 | -2 | 1 | -2 | 2 | 0 | 73 | -6 | 21 | 6 | -4 |
| AL | 7 | 1 | 4 | 3 | 2 | 2 | 82 | -10 | 5 | 13 | 6 |
| MK | 4 | -2 | 1 | -4 | 1 | 0 | 91 | 3 | 3 | 6 | -6 |
| ME | 13 | 1 | 1 | -4 | 5 | 4 | 81 | 1 | 0 | 19 | 1 |
| RS | 11 | 4 | 4 | -1 | 2 | -2 | 81 | -2 | 2 | 17 | 1 |
| TR | 5 | -6 | 3 | 1 | 3 | 1 | 87 | 6 | 2 | 11 | -4 |
| IS | 8 | 1 | 5 | 2 | 1 | 1 | 83 | 0 | 3 | 14 | 4 |
| MD | 14 | N.A. | 4 | N.A. | 1 | N.A. | 81 | N.A. | 0 | 19 | N.A. |
| NO | 7 | 1 | 4 | -2 | 3 | 2 | 84 | 1 | 2 | 14 | 1 |
| US | 7 | 1 | 0 | -2 | 2 | -2 | 87 | 3 | 4 | 9 | -3 |

**Q8a** Did your company experience any difficulties when bidding for a public procurement tender that included environmental requirements?
**(%)**

***IF CODE 1 TO 3 IN Q7***

| | Yes | | No | | Don't know |
|---|---|---|---|---|---|
| | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 |
| EU28 | 20 | -1 | 78 | 1 | 2 |
| BE | 29 | 5 | 71 | -5 | 0 |
| BG | 29 | -16 | 71 | 18 | 0 |
| CZ | 18 | 0 | 80 | 4 | 2 |
| DK | 39 | 19 | 57 | -21 | 4 |
| DE | 2 | -9 | 96 | 7 | 2 |
| EE | 15 | 8 | 69 | -22 | 16 |
| IE | 26 | 9 | 72 | -7 | 2 |
| EL | 33 | 19 | 67 | -19 | 0 |
| ES | 14 | 8 | 86 | -7 | 0 |
| FR | 33 | 0 | 66 | 0 | 1 |
| HR | 50 | 29 | 50 | -27 | 0 |
| IT | 3 | -19 | 97 | 20 | 0 |
| CY | 15 | -12 | 85 | 12 | 0 |
| LV | 42 | 13 | 57 | -14 | 1 |
| LT | 42 | 0 | 51 | -6 | 7 |
| LU | 6 | -9 | 94 | 9 | 0 |
| HU | 39 | 5 | 48 | -14 | 13 |
| MT | 29 | 12 | 71 | -11 | 0 |
| NL | 20 | -21 | 80 | 22 | 0 |
| AT | 11 | -4 | 86 | 1 | 3 |
| PL | 37 | 26 | 63 | -23 | 0 |
| PT | 9 | 5 | 83 | -1 | 8 |
| RO | 8 | -14 | 92 | 14 | 0 |
| SI | 31 | -15 | 69 | 16 | 0 |
| SK | 45 | 26 | 55 | -25 | 0 |
| FI | 42 | 20 | 58 | -19 | 0 |
| SE | 26 | 1 | 73 | 1 | 1 |
| UK | 2 | -13 | 87 | 3 | 11 |
| AL | 44 | -8 | 47 | -1 | 9 |
| MK | 33 | -1 | 67 | 1 | 0 |
| ME | 15 | 10 | 85 | -10 | 0 |
| RS | 31 | 9 | 63 | -13 | 6 |
| TR | 20 | 10 | 80 | -7 | 0 |
| IS | 5 | -5 | 90 | 0 | 5 |
| MD | 24 | N.A. | 71 | N.A. | 5 |
| NO | 25 | 15 | 74 | -15 | 1 |
| US | 40 | 24 | 59 | -24 | 1 |

**Q8b** Why did your company not apply for a public procurement tender that included environmental requirements?
**(ROTATE - MULTIPLE ANSWERS POSSIBLE) (%)**

***IF CODE 4 IN Q7***

| | You didn't even try to bid because you assumed it was too complicated | | You have never been confronted with such a tender | | The costs were too high | | Too much paperwork to be submitted | | Technical tests of the environmental performance or functionalities of your products or services were too complicated to obtain | | The costs of the technical tests of the environmental performance or functionalities of your products or services were too high | | Other (SP.) | | Don't know |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 |
| EU28 | 19 | 5 | 51 | -4 | 10 | 2 | 16 | 7 | 8 | 2 | 8 | N.A. | 25 | 1 | 8 |
| BE | 32 | 11 | 63 | -4 | 22 | 5 | 34 | 9 | 19 | 4 | 21 | N.A. | 6 | -8 | 17 |
| BG | 10 | 7 | 47 | -7 | 7 | 5 | 5 | 1 | 3 | 3 | 2 | N.A. | 33 | 8 | 5 |
| CZ | 23 | -1 | 45 | 3 | 8 | -1 | 10 | -3 | 9 | -1 | 4 | N.A. | 20 | -5 | 14 |
| DK | 8 | 2 | 65 | 17 | 7 | 0 | 5 | 2 | 5 | 2 | 2 | N.A. | 26 | -5 | 3 |
| DE | 9 | -1 | 37 | -15 | 8 | 1 | 8 | 1 | 4 | -5 | 4 | N.A. | 31 | 14 | 17 |
| EE | 6 | 2 | 54 | -11 | 2 | -1 | 2 | 0 | 2 | 1 | 1 | N.A. | 38 | 4 | 6 |
| IE | 14 | 1 | 65 | 14 | 13 | 2 | 16 | 7 | 8 | 2 | 8 | N.A. | 7 | -9 | 15 |
| EL | 13 | -8 | 46 | -15 | 8 | 0 | 17 | 1 | 7 | -2 | 9 | N.A. | 24 | 4 | 8 |
| ES | 16 | 0 | 59 | 6 | 7 | -1 | 11 | 1 | 4 | -3 | 7 | N.A. | 18 | -11 | 7 |
| FR | 38 | 28 | 64 | 4 | 25 | 23 | 45 | 41 | 22 | 21 | 23 | N.A. | 8 | -19 | 6 |
| HR | 23 | 8 | 23 | -9 | 7 | -1 | 18 | 3 | 6 | -1 | 4 | N.A. | 39 | 4 | 4 |
| IT | 7 | -4 | 40 | -4 | 1 | -5 | 2 | -1 | 0 | -3 | 0 | N.A. | 52 | 14 | 3 |
| CY | 14 | 1 | 41 | -21 | 8 | 7 | 4 | 3 | 0 | -3 | 0 | N.A. | 40 | 26 | 1 |
| LV | 22 | 5 | 61 | -5 | 8 | 3 | 11 | 0 | 8 | 2 | 8 | N.A. | 28 | 10 | 3 |
| LT | 14 | 8 | 53 | -10 | 5 | 4 | 5 | 0 | 0 | -2 | 1 | N.A. | 28 | 3 | 6 |
| LU | 11 | 0 | 69 | 22 | 9 | 2 | 10 | 3 | 1 | -2 | 5 | N.A. | 14 | -5 | 4 |
| HU | 17 | 4 | 32 | -8 | 7 | -4 | 11 | 4 | 2 | -1 | 2 | N.A. | 41 | 4 | 4 |
| MT | 9 | -2 | 61 | 10 | 3 | 2 | 1 | 0 | 2 | -2 | 0 | N.A. | 21 | 2 | 6 |
| NL | 6 | 2 | 75 | -5 | 3 | 0 | 5 | 1 | 4 | 1 | 3 | N.A. | 14 | 5 | 10 |
| AT | 11 | 6 | 40 | -8 | 3 | 0 | 7 | 5 | 5 | 1 | 5 | N.A. | 49 | 12 | 6 |
| PL | 32 | 8 | 47 | -8 | 21 | 11 | 26 | 11 | 16 | 8 | 16 | N.A. | 18 | 6 | 7 |
| PT | 28 | 8 | 69 | 3 | 17 | 1 | 24 | 10 | 19 | 9 | 16 | N.A. | 7 | -15 | 8 |
| RO | 17 | 1 | 46 | -10 | 6 | -5 | 8 | -8 | 6 | 1 | 2 | N.A. | 31 | 14 | 5 |
| SI | 33 | 5 | 20 | -10 | 10 | -2 | 13 | -1 | 12 | -3 | 4 | N.A. | 34 | 15 | 2 |
| SK | 24 | 5 | 40 | 1 | 7 | -9 | 18 | -4 | 7 | -5 | 5 | N.A. | 23 | -8 | 10 |
| FI | 12 | 3 | 79 | -4 | 6 | 2 | 11 | 8 | 8 | 3 | 7 | N.A. | 3 | -7 | 6 |
| SE | 17 | 13 | 73 | -4 | 14 | 11 | 18 | 13 | 11 | 9 | 10 | N.A. | 6 | -6 | 7 |
| UK | 28 | 7 | 55 | -15 | 14 | 1 | 23 | 8 | 10 | -3 | 9 | N.A. | 4 | -3 | 25 |
| AL | 7 | -20 | 7 | -42 | 9 | -20 | 5 | -16 | 0 | -1 | 0 | N.A. | 28 | 16 | 44 |
| MK | 14 | 5 | 39 | -19 | 4 | 0 | 3 | 2 | 5 | 4 | 0 | N.A. | 47 | 12 | 5 |
| ME | 11 | -12 | 62 | 11 | 4 | 3 | 3 | -11 | 0 | -5 | 0 | N.A. | 25 | 3 | 3 |
| RS | 24 | 5 | 43 | -14 | 4 | 3 | 8 | 3 | 5 | 4 | 2 | N.A. | 12 | -8 | 15 |
| TR | 47 | 19 | 61 | -13 | 33 | 9 | 34 | 18 | 36 | 15 | 34 | N.A. | 2 | 0 | 12 |
| IS | 11 | 0 | 65 | -7 | 10 | 2 | 8 | 0 | 7 | 2 | 9 | N.A. | 8 | 3 | 25 |
| MD | 26 | N.A. | 55 | N.A. | 13 | N.A. | 8 | N.A. | 0 | N.A. | 11 | N.A. | 14 | N.A. | 3 |
| NO | 3 | 0 | 58 | -24 | 5 | 2 | 2 | -6 | 3 | 3 | 0 | N.A. | 29 | 15 | 7 |
| US | 29 | 4 | 56 | -13 | 23 | 3 | 38 | 9 | 14 | -1 | 18 | N.A. | 7 | 0 | 15 |

**Q9** What was the most prominent difficulty that you faced when bidding for a public procurement tender with environmental requirements?
**(ROTATE) (%)**

***IF CODE 1 IN Q8a***

| | Costs | | Technical tests of the environmental performance or functionalities of your products or services | | Too much paperwork to be submitted | | Other | | Don't know |
|---|---|---|---|---|---|---|---|---|---|
| | Sept. 2015 | Sept. 2015 - Sept. 2013 | Sept. 2015 | Sept. 2015 - Sept. 2013 | Sept. 2015 | Sept. 2015 - Sept. 2013 | Sept. 2015 | Sept. 2015 - Sept. 2013 | Sept. 2015 |
| EU28 | 28 | 9 | 10 | -1 | 40 | 1 | 17 | -13 | 5 |
| BE | 0 | -8 | 24 | 24 | 61 | -23 | 15 | 7 | 0 |
| BG | 14 | -12 | 0 | -22 | 75 | 55 | 0 | -30 | 11 |
| CZ | 4 | -6 | 1 | -2 | 54 | 15 | 31 | -17 | 10 |
| DK | 20 | -4 | 25 | -1 | 14 | -26 | 41 | 34 | 0 |
| DE | 0 | -52 | 11 | 11 | 1 | -47 | 88 | 88 | 0 |
| EE | 1 | -24 | 0 | 0 | 98 | 23 | 1 | 1 | 0 |
| IE | 13 | -19 | 2 | -23 | 47 | 37 | 38 | 5 | 0 |
| EL | 16 | 16 | 0 | -24 | 80 | 46 | 4 | -29 | 0 |
| ES | 84 | 27 | 0 | 0 | 16 | -13 | 0 | -14 | 0 |
| FR | 31 | 17 | 8 | -13 | 38 | 3 | 12 | -18 | 11 |
| HR | 36 | 34 | 13 | -1 | 38 | 12 | 13 | -45 | 0 |
| IT | 96 | 72 | 0 | -3 | 4 | -24 | 0 | -45 | 0 |
| CY | 0 | -46 | 5 | 0 | 95 | 55 | 0 | -9 | 0 |
| LV | 10 | 5 | 0 | -3 | 83 | 26 | 7 | -28 | 0 |
| LT | 0 | -10 | 0 | 0 | 17 | -32 | 60 | 19 | 23 |
| LU | 0 | -14 | 75 | 68 | 16 | -63 | 9 | 9 | 0 |
| HU | 33 | 4 | 1 | -7 | 41 | -1 | 25 | 4 | 0 |
| MT | 0 | -7 | 0 | -52 | 2 | 2 | 97 | 56 | 1 |
| NL | 8 | -20 | 8 | 1 | 11 | -30 | 73 | 49 | 0 |
| AT | 38 | 6 | 0 | -4 | 28 | -15 | 34 | 13 | 0 |
| PL | 36 | -1 | 37 | 37 | 26 | -22 | 0 | -10 | 1 |
| PT | 3 | 3 | 0 | 0 | 94 | -6 | 3 | 3 | 0 |
| RO | 0 | -4 | 0 | -36 | 60 | 35 | 6 | -29 | 34 |
| SI | 39 | -29 | 0 | -4 | 16 | -6 | 26 | 20 | 19 |
| SK | 13 | 0 | 0 | -3 | 67 | 23 | 20 | -20 | 0 |
| FI | 5 | -5 | 0 | -36 | 86 | 65 | 9 | -24 | 0 |
| SE | 16 | 15 | 4 | -7 | 60 | 14 | 18 | -20 | 2 |
| UK | 1 | 1 | 32 | 32 | 67 | -6 | 0 | -27 | 0 |
| AL | 0 | -74 | 0 | -9 | 54 | 37 | 46 | 46 | 0 |
| MK | 0 | -39 | 71 | 66 | 0 | -41 | 29 | 14 | 0 |
| ME | 0 | 0 | 0 | 0 | 100 | 33 | 0 | -33 | 0 |
| RS | 0 | -8 | 0 | 0 | 47 | 10 | 53 | -2 | 0 |
| TR | 36 | -2 | 19 | 3 | 17 | 8 | 28 | -9 | 0 |
| IS | 0 | 0 | 99 | 99 | 1 | -99 | 0 | 0 | 0 |
| MD | 39 | N.A. | 0 | N.A. | 23 | N.A. | 38 | N.A. | 0 |
| NO | 6 | -48 | 6 | -2 | 88 | 58 | 0 | -8 | 0 |
| US | 22 | -10 | 0 | -33 | 78 | 43 | 0 | 0 | 0 |

**Q10** Which type of support does your company rely on in its efforts to be more resource efficient? **(ROTATE - MULTIPLE ANSWERS POSSIBLE) (%)**

***IF CODE 1 TO 8 IN Q1***

| | Its own financial resources | | Its own technical expertise | | External support | | Other (SP.) | | Don't know |
|---|---|---|---|---|---|---|---|---|---|
| | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 |
| EU28 | 63 | 3 | 61 | 8 | 19 | 0 | 2 | 0 | 5 |
| BE | 74 | -4 | 50 | 6 | 28 | 11 | 1 | -2 | 8 |
| BG | 67 | 8 | 67 | 18 | 11 | -2 | 1 | -2 | 1 |
| CZ | 72 | -7 | 63 | 1 | 12 | -3 | 1 | 0 | 5 |
| DK | 63 | 10 | 62 | 17 | 29 | 11 | 5 | 1 | 8 |
| DE | 56 | -5 | 47 | -6 | 21 | -9 | 2 | 1 | 10 |
| EE | 74 | -8 | 62 | -1 | 9 | -1 | 5 | 1 | 4 |
| IE | 60 | 0 | 42 | 0 | 16 | -2 | 0 | -1 | 8 |
| EL | 67 | -8 | 53 | 11 | 7 | -7 | 0 | -4 | 2 |
| ES | 65 | 4 | 58 | 9 | 24 | 6 | 0 | -3 | 1 |
| FR | 78 | 19 | 66 | 27 | 28 | 14 | 2 | 1 | 3 |
| HR | 82 | -9 | 65 | -27 | 8 | -3 | 3 | 3 | 2 |
| IT | 42 | -5 | 67 | 8 | 17 | -2 | 3 | 0 | 2 |
| CY | 70 | 5 | 37 | -11 | 12 | 4 | 5 | 5 | 0 |
| LV | 70 | -8 | 63 | 8 | 12 | 3 | 2 | 2 | 7 |
| LT | 78 | 9 | 44 | 8 | 7 | 1 | 1 | -1 | 6 |
| LU | 51 | -13 | 41 | 10 | 22 | 11 | 3 | 3 | 8 |
| HU | 67 | 7 | 67 | 17 | 13 | -10 | 4 | -1 | 2 |
| MT | 59 | -13 | 55 | 10 | 18 | 1 | 1 | 0 | 2 |
| NL | 52 | 3 | 54 | 0 | 28 | -1 | 1 | 0 | 6 |
| AT | 56 | -11 | 57 | -4 | 38 | 6 | 0 | -2 | 5 |
| PL | 70 | 8 | 74 | 11 | 12 | 1 | 1 | 1 | 1 |
| PT | 76 | 8 | 61 | 16 | 15 | 3 | 2 | 2 | 4 |
| RO | 90 | 3 | 23 | -2 | 5 | 3 | 1 | 0 | 1 |
| SI | 67 | -2 | 68 | 24 | 11 | -9 | 3 | 0 | 2 |
| SK | 62 | -6 | 41 | -18 | 7 | -8 | 3 | 1 | 13 |
| FI | 67 | 10 | 59 | 9 | 20 | 5 | 0 | 0 | 3 |
| SE | 61 | 7 | 54 | 6 | 18 | 2 | 3 | 0 | 8 |
| UK | 67 | 4 | 66 | 4 | 17 | -7 | 1 | 0 | 11 |
| AL | 78 | -14 | 46 | 24 | 7 | -4 | 0 | -4 | 1 |
| MK | 86 | 2 | 66 | 25 | 3 | -5 | 1 | 1 | 0 |
| ME | 71 | 0 | 60 | 22 | 17 | -4 | 0 | -1 | 1 |
| RS | 69 | 1 | 59 | 19 | 9 | -1 | 0 | -1 | 3 |
| TR | 82 | 1 | 34 | 8 | 6 | -4 | 0 | -1 | 1 |
| IS | 57 | 7 | 55 | -7 | 21 | 0 | 5 | 3 | 13 |
| MD | 84 | N.A. | 16 | N.A. | 15 | N.A. | 5 | N.A. | 1 |
| NO | 42 | -32 | 55 | 2 | 16 | -1 | 6 | 4 | 9 |
| US | 62 | 1 | 54 | -4 | 20 | -3 | 0 | -1 | 6 |

**Q11** More precisely, which type of external support is it?
**(ROTATE - MULTIPLE ANSWERS POSSIBLE) (%)**

***IF CODE 3 IN Q10***

| | Public funding such as grants, guarantees or loans | | Private funding from a bank, investment company or venture capital fund | | Private funding from friends and relatives | | Advice or other non-financial assistance from public administration | | Advice or other non-financial assistance from private consulting and audit companies | | Advice or other non-financial assistance from business associations | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 |
| EU28 | 19 | 0 | 33 | 12 | 10 | 3 | 17 | -5 | 35 | -8 | 32 | -4 |
| BE | 35 | 18 | 27 | -14 | 11 | -2 | 25 | -4 | 41 | -11 | 32 | 4 |
| BG | 42 | 10 | 29 | 8 | 12 | 5 | 23 | 7 | 22 | 8 | 17 | -5 |
| CZ | 47 | 8 | 39 | -7 | 23 | 15 | 31 | 11 | 57 | 15 | 15 | -14 |
| DK | 18 | 12 | 8 | -2 | 1 | -1 | 24 | 11 | 57 | -10 | 49 | 28 |
| DE | 26 | -4 | 19 | -4 | 5 | -3 | 17 | -11 | 31 | -7 | 37 | -7 |
| EE | 47 | -22 | 33 | 15 | 0 | -1 | 9 | -7 | 17 | 16 | 2 | -4 |
| IE | 26 | 18 | 24 | 14 | 4 | -1 | 17 | -11 | 42 | 5 | 45 | 22 |
| EL | 4 | -40 | 36 | -13 | 0 | -8 | 0 | -17 | 48 | 5 | 4 | -42 |
| ES | 14 | -3 | 45 | 28 | 12 | 1 | 11 | -1 | 48 | -16 | 27 | -11 |
| FR | 20 | 3 | 35 | 19 | 10 | 8 | 18 | -9 | 41 | 6 | 40 | 12 |
| HR | 38 | -8 | 37 | 32 | 10 | 10 | 9 | -19 | 11 | -9 | 13 | -12 |
| IT | 1 | -4 | 51 | 37 | 0 | -4 | 5 | -6 | 22 | -29 | 19 | -18 |
| CY | 64 | 61 | 28 | 8 | 11 | 6 | 8 | -41 | 31 | 13 | 14 | 6 |
| LV | 42 | -1 | 34 | -12 | 19 | 0 | 44 | 10 | 36 | -23 | 39 | -4 |
| LT | 28 | -13 | 33 | 1 | 0 | -10 | 41 | 29 | 8 | -14 | 15 | -11 |
| LU | 38 | 34 | 29 | 6 | 11 | 11 | 34 | -6 | 29 | 4 | 38 | 16 |
| HU | 21 | 13 | 38 | 22 | 3 | 3 | 17 | 9 | 33 | 6 | 38 | 7 |
| MT | 11 | -25 | 45 | 2 | 2 | 2 | 6 | -12 | 13 | -33 | 28 | -2 |
| NL | 27 | -3 | 23 | -1 | 14 | -4 | 19 | -10 | 38 | -8 | 27 | -12 |
| AT | 28 | -1 | 21 | -1 | 6 | -3 | 18 | -9 | 30 | 15 | 34 | -4 |
| PL | 38 | 14 | 20 | -1 | 23 | 6 | 31 | 8 | 22 | -4 | 43 | 30 |
| PT | 28 | -3 | 51 | -3 | 40 | 24 | 17 | -14 | 29 | -17 | 30 | -18 |
| RO | 8 | -7 | 13 | -10 | 0 | -28 | 0 | -15 | 10 | -33 | 31 | -9 |
| SI | 30 | -17 | 27 | 3 | 16 | 16 | 7 | -2 | 26 | 0 | 12 | -10 |
| SK | 33 | -11 | 11 | -27 | 5 | -2 | 24 | -17 | 46 | 1 | 12 | -24 |
| FI | 32 | 6 | 28 | -11 | 5 | 4 | 34 | -10 | 47 | -2 | 55 | 12 |
| SE | 29 | 10 | 23 | 3 | 16 | 16 | 43 | 19 | 23 | -16 | 49 | 22 |
| UK | 4 | -6 | 13 | -6 | 15 | 11 | 17 | -17 | 30 | -3 | 31 | -9 |
| AL | 9 | 9 | 0 | -56 | 0 | -44 | 0 | 0 | 0 | 0 | 0 | 0 |
| MK | 1 | 1 | 1 | -43 | 0 | -18 | 1 | -3 | 0 | -32 | 0 | -7 |
| ME | 57 | 31 | 48 | 3 | 6 | 6 | 49 | 27 | 49 | 25 | 39 | 17 |
| RS | 1 | -30 | 29 | 0 | 0 | 0 | 32 | 23 | 40 | -12 | 12 | -12 |
| TR | 54 | -3 | 41 | 18 | 46 | 20 | 15 | -12 | 37 | 7 | 49 | 13 |
| IS | 0 | -2 | 9 | -3 | 8 | 3 | 22 | 15 | 45 | -6 | 21 | 7 |
| MD | 37 | N.A. | 30 | N.A. | 0 | N.A. | 0 | N.A. | 0 | N.A. | 16 | N.A. |
| NO | 6 | -9 | 35 | 12 | 2 | 1 | 1 | -13 | 49 | 0 | 17 | -21 |
| US | 16 | -4 | 24 | 3 | 16 | -4 | 29 | -14 | 42 | 1 | 63 | 8 |

**Q11** More precisely, which type of external support is it?
**(ROTATE - MULTIPLE ANSWERS POSSIBLE) (%)**

***IF CODE 3 IN Q10***

| | Other (SP.) | | Don't know | Total 'Public sector' | | Total 'Private sector' | |
|---|---|---|---|---|---|---|---|
| | Sept. 2015 | *Sept.2015 - Sept. 2013* | Sept. 2015 | Sept. 2015 | *Sept.2015 - Sept. 2013* | Sept. 2015 | *Sept.2015 - Sept. 2013* |
| EU28 | 9 | *1* | 4 | 30 | *-5* | 79 | *4* |
| BE | 4 | *-1* | 3 | 50 | *7* | 67 | *-18* |
| BG | 26 | *20* | 3 | 48 | *1* | 41 | *-21* |
| CZ | 3 | *2* | 0 | 63 | *11* | 88 | *15* |
| DK | 8 | *0* | 3 | 35 | *16* | 82 | *-1* |
| DE | 7 | *1* | 5 | 37 | *-11* | 75 | *-2* |
| EE | 4 | *-1* | 2 | 49 | *-21* | 51 | *28* |
| IE | 1 | *-4* | 12 | 29 | *-7* | 82 | *16* |
| EL | 34 | *33* | 0 | 4 | *-48* | 65 | *-29* |
| ES | 5 | *-1* | 5 | 21 | *-3* | 91 | *7* |
| FR | 8 | *-5* | 0 | 31 | *-12* | 86 | *24* |
| HR | 7 | *-12* | 0 | 39 | *-25* | 65 | *25* |
| IT | 10 | *4* | 0 | 6 | *-9* | 85 | *-1* |
| CY | 11 | *8* | 0 | 64 | *12* | 48 | *2* |
| LV | 5 | *-3* | 7 | 54 | *-3* | 74 | *4* |
| LT | 17 | *11* | 0 | 66 | *14* | 40 | *-16* |
| LU | 11 | *10* | 0 | 61 | *19* | 62 | *-2* |
| HU | 7 | *-4* | 0 | 38 | *22* | 82 | *22* |
| MT | 13 | *11* | 11 | 16 | *-25* | 74 | *-8* |
| NL | 15 | *5* | 8 | 39 | *-6* | 63 | *-15* |
| AT | 23 | *11* | 2 | 40 | *-5* | 63 | *-3* |
| PL | 6 | *-2* | 5 | 50 | *10* | 74 | *14* |
| PT | 5 | *-1* | 7 | 37 | *-9* | 84 | *-9* |
| RO | 50 | *20* | 0 | 8 | *-15* | 41 | *-25* |
| SI | 5 | *4* | 0 | 38 | *-18* | 69 | *9* |
| SK | 6 | *0* | 12 | 52 | *-12* | 47 | *-23* |
| FI | 8 | *5* | 4 | 54 | *0* | 81 | *-2* |
| SE | 6 | *-14* | 6 | 53 | *18* | 73 | *5* |
| UK | 21 | *13* | 16 | 19 | *-20* | 64 | *-3* |
| AL | 0 | *0* | 91 | 9 | *9* | 0 | *-100* |
| MK | 98 | *98* | 0 | 1 | *-3* | 1 | *-97* |
| ME | 0 | *0* | 0 | 72 | *25* | 82 | *8* |
| RS | 6 | *-3* | 0 | 32 | *0* | 81 | *0* |
| TR | 6 | *4* | 0 | 61 | *-9* | 94 | *32* |
| IS | 17 | *4* | 16 | 22 | *13* | 55 | *-15* |
| MD | 24 | *N.A.* | 0 | 37 | *N.A.* | 46 | *N.A.* |
| NO | 5 | *1* | 0 | 6 | *-22* | 94 | *7* |
| US | 6 | *1* | 2 | 39 | *-15* | 82 | *10* |

**Q12** Did your company encounter any of the following difficulties when trying to set up resource efficiency actions? **(ROTATE - MULTIPLE ANSWERS POSSIBLE) (%)**

***IF CODE 1 TO 8 IN Q1***

| | Complexity of administrative or legal procedures | | Difficulty to adapt environmental legislation to your company | | Technical requirements of the legislation not being up to date | | Difficulty in choosing the right resource efficiency actions for your company | | Cost of environmental actions | | Lack of specific environmental expertise | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 |
| EU28 | 29 | 3 | 21 | 4 | 15 | 4 | 18 | 1 | 23 | -1 | 20 | 0 |
| BE | 35 | -3 | 27 | 2 | 21 | -1 | 25 | 4 | 25 | 1 | 29 | 2 |
| BG | 29 | -3 | 12 | 3 | 18 | 2 | 12 | 7 | 12 | 4 | 16 | 6 |
| CZ | 38 | -1 | 8 | -7 | 8 | -6 | 16 | 0 | 23 | -4 | 12 | -7 |
| DK | 15 | 4 | 16 | 8 | 8 | 4 | 17 | 8 | 30 | 11 | 15 | 3 |
| DE | 11 | -10 | 12 | -3 | 5 | -4 | 6 | -12 | 13 | -10 | 8 | -9 |
| EE | 9 | 3 | 5 | -1 | 5 | 3 | 7 | 2 | 14 | 4 | 2 | -4 |
| IE | 15 | 6 | 15 | 2 | 13 | 7 | 20 | 7 | 23 | 3 | 20 | 1 |
| EL | 44 | 7 | 23 | 3 | 29 | 4 | 19 | -2 | 30 | -6 | 29 | 6 |
| ES | 29 | -1 | 22 | 3 | 11 | -4 | 16 | -4 | 29 | -5 | 23 | -10 |
| FR | 66 | 39 | 54 | 36 | 42 | 28 | 47 | 30 | 46 | 19 | 43 | 20 |
| HR | 31 | 2 | 13 | 1 | 17 | 0 | 8 | -1 | 14 | 3 | 13 | 3 |
| IT | 13 | -12 | 8 | -11 | 5 | -3 | 4 | -11 | 8 | -12 | 8 | -7 |
| CY | 27 | 13 | 10 | 4 | 20 | 10 | 8 | 2 | 16 | 6 | 12 | 6 |
| LV | 27 | 0 | 16 | 0 | 14 | -2 | 19 | 2 | 17 | 0 | 23 | 5 |
| LT | 12 | -2 | 8 | -3 | 4 | -5 | 8 | -3 | 12 | -1 | 13 | -4 |
| LU | 19 | -10 | 20 | 0 | 11 | -6 | 13 | -8 | 16 | -6 | 11 | -6 |
| HU | 20 | -3 | 19 | 0 | 8 | -1 | 9 | -4 | 20 | 1 | 15 | 6 |
| MT | 18 | -3 | 17 | 8 | 13 | 7 | 11 | -4 | 16 | -14 | 20 | 0 |
| NL | 18 | 0 | 13 | 0 | 11 | 2 | 14 | 0 | 23 | 6 | 16 | 0 |
| AT | 21 | 2 | 17 | 8 | 8 | 0 | 13 | 2 | 20 | -6 | 16 | 2 |
| PL | 46 | 12 | 35 | 12 | 21 | 10 | 26 | 11 | 22 | 2 | 28 | 6 |
| PT | 31 | 0 | 24 | -4 | 20 | -2 | 24 | -6 | 28 | -3 | 23 | -4 |
| RO | 28 | -1 | 19 | 1 | 20 | 5 | 16 | 7 | 20 | 3 | 8 | -7 |
| SI | 20 | -5 | 13 | 1 | 13 | 5 | 9 | 2 | 17 | 4 | 13 | 5 |
| SK | 33 | -6 | 16 | -2 | 13 | 0 | 10 | -6 | 12 | -16 | 12 | -7 |
| FI | 30 | 1 | 19 | 2 | 21 | 11 | 21 | -7 | 23 | -1 | 22 | -1 |
| SE | 27 | 10 | 17 | 9 | 18 | 11 | 35 | 10 | 33 | 10 | 25 | 12 |
| UK | 18 | 4 | 15 | 2 | 6 | 1 | 16 | 2 | 23 | 4 | 17 | -2 |
| AL | 28 | -33 | 7 | -21 | 2 | -12 | 0 | -5 | 2 | -10 | 1 | -13 |
| MK | 16 | -3 | 18 | 8 | 13 | 6 | 28 | 15 | 16 | -8 | 14 | 7 |
| ME | 21 | -10 | 9 | 2 | 9 | -11 | 12 | 7 | 12 | 1 | 14 | -5 |
| RS | 25 | 1 | 9 | 2 | 11 | -1 | 9 | 4 | 18 | -4 | 15 | -6 |
| TR | 59 | 18 | 45 | 17 | 44 | 21 | 51 | 24 | 51 | 17 | 45 | 18 |
| IS | 27 | 3 | 14 | 4 | 14 | 7 | 22 | 7 | 23 | 2 | 24 | 5 |
| MD | 16 | N.A. | 15 | N.A. | 22 | N.A. | 11 | N.A. | 13 | N.A. | 9 | N.A. |
| NO | 20 | 4 | 8 | -1 | 12 | 5 | 10 | -6 | 23 | 8 | 18 | 7 |
| US | 28 | 6 | 22 | 4 | 17 | -1 | 19 | -2 | 29 | 6 | 26 | -3 |

**Q12** Did your company encounter any of the following difficulties when trying to set up resource efficiency actions? **(ROTATE - MULTIPLE ANSWERS POSSIBLE) (%)**

***IF CODE 1 TO 8 IN Q1***

| | Lack of supply of required materials, parts, products or services | | Lack of demand for resource efficient products or services | | Other (SP.) | | None (SP.) | | Don't know |
|---|---|---|---|---|---|---|---|---|---|
| | Sept. 2015 | *Sept.2015 - Sept. 2013* | Sept. 2015 | *Sept.2015 - Sept. 2013* | Sept. 2015 | *Sept.2015 - Sept. 2013* | Sept. 2015 | *Sept.2015 - Sept. 2013* | Sept. 2015 |
| EU28 | 11 | *N.A.* | 20 | *N.A.* | 2 | *0* | 37 | *-1* | 5 |
| BE | 15 | *N.A.* | 35 | *N.A.* | 0 | *-3* | 27 | *-2* | 2 |
| BG | 12 | *N.A.* | 14 | *N.A.* | 4 | *-2* | 28 | *-2* | 8 |
| CZ | 9 | *N.A.* | 18 | *N.A.* | 1 | *1* | 34 | *-5* | 6 |
| DK | 9 | *N.A.* | 14 | *N.A.* | 2 | *-2* | 39 | *-10* | 4 |
| DE | 8 | *N.A.* | 13 | *N.A.* | 3 | *2* | 47 | *2* | 8 |
| EE | 8 | *N.A.* | 13 | *N.A.* | 7 | *-1* | 49 | *-8* | 7 |
| IE | 12 | *N.A.* | 25 | *N.A.* | 2 | *-1* | 35 | *-7* | 8 |
| EL | 21 | *N.A.* | 21 | *N.A.* | 1 | *0* | 26 | *-12* | 1 |
| ES | 13 | *N.A.* | 22 | *N.A.* | 0 | *-1* | 30 | *-6* | 5 |
| FR | 21 | *N.A.* | 36 | *N.A.* | 0 | *-2* | 11 | *-18* | 2 |
| HR | 6 | *N.A.* | 12 | *N.A.* | 4 | *-2* | 41 | *-1* | 6 |
| IT | 3 | *N.A.* | 4 | *N.A.* | 4 | *2* | 58 | *19* | 8 |
| CY | 13 | *N.A.* | 15 | *N.A.* | 0 | *-2* | 43 | *-15* | 3 |
| LV | 17 | *N.A.* | 21 | *N.A.* | 5 | *2* | 31 | *-8* | 6 |
| LT | 6 | *N.A.* | 5 | *N.A.* | 9 | *4* | 48 | *-1* | 12 |
| LU | 11 | *N.A.* | 19 | *N.A.* | 0 | *-2* | 35 | *7* | 2 |
| HU | 10 | *N.A.* | 11 | *N.A.* | 2 | *1* | 38 | *1* | 2 |
| MT | 15 | *N.A.* | 10 | *N.A.* | 0 | *-7* | 36 | *-7* | 3 |
| NL | 9 | *N.A.* | 19 | *N.A.* | 2 | *1* | 46 | *-3* | 1 |
| AT | 12 | *N.A.* | 18 | *N.A.* | 1 | *-1* | 45 | *-8* | 1 |
| PL | 17 | *N.A.* | 29 | *N.A.* | 1 | *1* | 21 | *1* | 3 |
| PT | 17 | *N.A.* | 21 | *N.A.* | 2 | *1* | 33 | *-3* | 4 |
| RO | 10 | *N.A.* | 14 | *N.A.* | 2 | *-1* | 31 | *-5* | 5 |
| SI | 10 | *N.A.* | 16 | *N.A.* | 6 | *3* | 41 | *-2* | 3 |
| SK | 7 | *N.A.* | 14 | *N.A.* | 3 | *0* | 35 | *2* | 14 |
| FI | 17 | *N.A.* | 25 | *N.A.* | 1 | *0* | 25 | *-13* | 5 |
| SE | 20 | *N.A.* | 27 | *N.A.* | 2 | *1* | 31 | *-8* | 2 |
| UK | 7 | *N.A.* | 22 | *N.A.* | 0 | *-1* | 48 | *-1* | 9 |
| AL | 0 | *N.A.* | 5 | *N.A.* | 8 | *8* | 44 | *24* | 6 |
| MK | 9 | *N.A.* | 17 | *N.A.* | 4 | *-5* | 40 | *2* | 1 |
| ME | 19 | *N.A.* | 25 | *N.A.* | 4 | *4* | 37 | *8* | 9 |
| RS | 7 | *N.A.* | 7 | *N.A.* | 2 | *-3* | 31 | *4* | 3 |
| TR | 30 | *N.A.* | 41 | *N.A.* | 0 | *0* | 13 | *-9* | 2 |
| IS | 17 | *N.A.* | 19 | *N.A.* | 2 | *2* | 18 | *-10* | 18 |
| MD | 17 | *N.A.* | 18 | *N.A.* | 13 | *N.A.* | 24 | *N.A.* | 5 |
| NO | 9 | *N.A.* | 20 | *N.A.* | 4 | *3* | 40 | *-10* | 2 |
| US | 21 | *N.A.* | 29 | *N.A.* | 1 | *0* | 32 | *-11* | 5 |

**Q13** Which of the following would help your company the most to be more resource efficient?
**(ROTATE - MAX. 3 ANSWERS) (%)**

| | A tool to self-assess how resource efficient your company is with respect to other companies | | Consultancy on how to improve resource efficiency in your company | | Grants or subsidies | | Advice on funding possibilities and financial planning for resource efficiency investments | | Demonstration of new technologies or processes to improve resource efficiency | | Database with case studies that show the benefits of resource efficiency for companies | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 |
| EU28 | 11 | -5 | 21 | -4 | 32 | -2 | 19 | -3 | 17 | -2 | 13 | -3 |
| BE | 23 | -4 | 20 | -4 | 32 | -5 | 25 | -2 | 24 | -1 | 20 | 1 |
| BG | 6 | -3 | 15 | -6 | 29 | 2 | 13 | 4 | 17 | 3 | 14 | -6 |
| CZ | 5 | -2 | 20 | 1 | 26 | -12 | 20 | -1 | 28 | -1 | 16 | 1 |
| DK | 18 | 5 | 31 | 2 | 30 | 0 | 12 | -2 | 27 | 6 | 20 | 11 |
| DE | 13 | -11 | 21 | -4 | 32 | 1 | 15 | -6 | 12 | -10 | 12 | -11 |
| EE | 3 | -3 | 8 | -2 | 24 | -2 | 12 | -4 | 14 | -2 | 4 | -9 |
| IE | 15 | -5 | 24 | 2 | 40 | -1 | 24 | -5 | 21 | -4 | 18 | -10 |
| EL | 15 | -5 | 19 | -9 | 38 | -10 | 33 | 6 | 18 | -10 | 19 | 3 |
| ES | 12 | -3 | 33 | -3 | 36 | -5 | 23 | 2 | 17 | -5 | 16 | -9 |
| FR | 16 | 3 | 34 | 5 | 45 | 10 | 29 | 6 | 27 | 10 | 20 | 10 |
| HR | 7 | 1 | 34 | 2 | 48 | -10 | 25 | -4 | 12 | -5 | 13 | -4 |
| IT | 3 | -11 | 8 | -17 | 24 | -7 | 8 | -9 | 6 | -8 | 1 | -8 |
| CY | 5 | -3 | 26 | 5 | 53 | 14 | 15 | -2 | 14 | -3 | 5 | -1 |
| LV | 12 | -3 | 24 | -5 | 29 | -1 | 27 | -2 | 22 | 3 | 11 | -3 |
| LT | 11 | 1 | 20 | -7 | 26 | 1 | 17 | -8 | 22 | 0 | 5 | -7 |
| LU | 15 | -1 | 29 | 2 | 35 | -3 | 18 | -11 | 21 | 4 | 24 | 17 |
| HU | 6 | 0 | 12 | -10 | 37 | -5 | 14 | -2 | 17 | 2 | 13 | 1 |
| MT | 16 | 3 | 30 | 1 | 41 | -1 | 28 | -6 | 18 | 4 | 13 | 1 |
| NL | 13 | -14 | 18 | -1 | 29 | 6 | 13 | -10 | 18 | -5 | 12 | -9 |
| AT | 17 | -1 | 22 | -4 | 31 | -8 | 19 | -7 | 26 | -1 | 21 | 1 |
| PL | 9 | -5 | 16 | -7 | 29 | -9 | 24 | -3 | 14 | -3 | 13 | -4 |
| PT | 19 | -2 | 31 | 1 | 25 | 4 | 29 | 2 | 33 | 4 | 22 | 0 |
| RO | 7 | 2 | 18 | -1 | 22 | -9 | 21 | -1 | 13 | -2 | 12 | -1 |
| SI | 4 | -7 | 14 | -7 | 31 | -25 | 13 | -5 | 17 | 7 | 11 | 4 |
| SK | 7 | -3 | 20 | -2 | 28 | -9 | 19 | -8 | 17 | -2 | 9 | -10 |
| FI | 20 | -8 | 23 | -3 | 17 | -6 | 15 | 7 | 20 | 2 | 18 | -2 |
| SE | 22 | 4 | 30 | -1 | 26 | 0 | 22 | 4 | 24 | 8 | 15 | 2 |
| UK | 17 | -5 | 15 | 0 | 40 | 4 | 24 | -4 | 20 | 1 | 15 | -2 |
| AL | 4 | -18 | 13 | -16 | 17 | -15 | 16 | -6 | 4 | -19 | 5 | -1 |
| MK | 4 | -9 | 28 | 3 | 28 | -19 | 31 | -8 | 11 | 2 | 11 | 6 |
| ME | 2 | -3 | 21 | 6 | 58 | 13 | 16 | -3 | 29 | 15 | 11 | -6 |
| RS | 8 | 4 | 19 | 3 | 41 | 2 | 14 | -1 | 19 | 7 | 9 | 1 |
| TR | 19 | -7 | 30 | 5 | 29 | 3 | 31 | 13 | 30 | 3 | 23 | 3 |
| IS | 8 | -2 | 21 | -8 | 24 | -1 | 10 | 1 | 25 | 1 | 15 | 5 |
| MD | 4 | N.A. | 23 | N.A. | 47 | N.A. | 19 | N.A. | 27 | N.A. | 19 | N.A. |
| NO | 18 | -5 | 12 | -5 | 14 | -7 | 18 | -2 | 19 | -1 | 5 | -2 |
| US | 14 | -14 | 12 | -12 | 24 | -7 | 16 | -6 | 28 | -8 | 17 | -4 |

**Q13** Which of the following would help your company the most to be more resource efficient?
**(ROTATE - MAX. 3 ANSWERS) (%)**

| | Better cooperation between companies across sectors so that new processes to re-use waste and by-products can be developed | | Abolition of legislative obstacles to the use of waste and by-products | | Other (SP.) | | None (SP.) | | Don't know |
|---|---|---|---|---|---|---|---|---|---|
| | Sept. 2015 | *Sept.2015 - Sept. 2013* | Sept. 2015 | *Sept.2015 - Sept. 2013* | Sept. 2015 | *Sept.2015 - Sept. 2013* | Sept. 2015 | *Sept.2015 - Sept. 2013* | Sept. 2015 |
| EU28 | 18 | *-1* | 18 | *N.A.* | 3 | *1* | 22 | *7* | 5 |
| BE | 29 | *4* | 13 | *N.A.* | 0 | *-3* | 21 | *11* | 2 |
| BG | 19 | *7* | 17 | *N.A.* | 3 | *0* | 19 | *6* | 5 |
| CZ | 18 | *-4* | 22 | *N.A.* | 2 | *0* | 22 | *3* | 4 |
| DK | 20 | *10* | 11 | *N.A.* | 0 | *-7* | 25 | *4* | 2 |
| DE | 5 | *-6* | 16 | *N.A.* | 6 | *2* | 24 | *4* | 8 |
| EE | 11 | *2* | 4 | *N.A.* | 5 | *0* | 41 | *2* | 4 |
| IE | 23 | *5* | 11 | *N.A.* | 1 | *0* | 7 | *1* | 8 |
| EL | 13 | *-3* | 16 | *N.A.* | 1 | *-1* | 19 | *5* | 1 |
| ES | 16 | *-5* | 23 | *N.A.* | 1 | *0* | 14 | *3* | 3 |
| FR | 29 | *12* | 28 | *N.A.* | 1 | *-2* | 6 | *-9* | 2 |
| HR | 17 | *4* | 12 | *N.A.* | 3 | *0* | 18 | *9* | 3 |
| IT | 9 | *-12* | 13 | *N.A.* | 6 | *2* | 40 | *25* | 7 |
| CY | 9 | *-5* | 3 | *N.A.* | 1 | *-4* | 23 | *1* | 3 |
| LV | 17 | *2* | 10 | *N.A.* | 1 | *1* | 26 | *10* | 2 |
| LT | 13 | *-4* | 7 | *N.A.* | 5 | *2* | 23 | *0* | 13 |
| LU | 21 | *2* | 9 | *N.A.* | 2 | *-1* | 22 | *9* | 2 |
| HU | 15 | *0* | 8 | *N.A.* | 4 | *-1* | 26 | *10* | 2 |
| MT | 18 | *0* | 13 | *N.A.* | 1 | *-1* | 18 | *-4* | 0 |
| NL | 24 | *-2* | 19 | *N.A.* | 1 | *0* | 26 | *6* | 4 |
| AT | 18 | *-1* | 25 | *N.A.* | 2 | *1* | 18 | *2* | 1 |
| PL | 21 | *3* | 18 | *N.A.* | 2 | *1* | 23 | *11* | 5 |
| PT | 22 | *-6* | 19 | *N.A.* | 3 | *1* | 14 | *4* | 2 |
| RO | 21 | *-3* | 17 | *N.A.* | 2 | *0* | 18 | *10* | 10 |
| SI | 14 | *2* | 19 | *N.A.* | 4 | *1* | 26 | *12* | 2 |
| SK | 14 | *-13* | 22 | *N.A.* | 4 | *1* | 14 | *1* | 12 |
| FI | 26 | *-2* | 16 | *N.A.* | 0 | *-2* | 15 | *-1* | 5 |
| SE | 25 | *9* | 10 | *N.A.* | 1 | *-2* | 25 | *5* | 2 |
| UK | 21 | *8* | 15 | *N.A.* | 0 | *-1* | 18 | *-2* | 9 |
| AL | 4 | *-6* | 3 | *N.A.* | 3 | *3* | 39 | *26* | 6 |
| MK | 19 | *-5* | 7 | *N.A.* | 2 | *-1* | 23 | *11* | 1 |
| ME | 35 | *14* | 11 | *N.A.* | 3 | *1* | 7 | *0* | 1 |
| RS | 18 | *0* | 14 | *N.A.* | 4 | *-2* | 15 | *4* | 2 |
| TR | 24 | *0* | 13 | *N.A.* | 0 | *-1* | 7 | *-1* | 4 |
| IS | 25 | *9* | 8 | *N.A.* | 7 | *3* | 3 | *0* | 27 |
| MD | 25 | *N.A.* | 15 | *N.A.* | 7 | *N.A.* | 8 | *N.A.* | 3 |
| NO | 27 | *11* | 9 | *N.A.* | 2 | *1* | 26 | *2* | 2 |
| US | 25 | *0* | 19 | *N.A.* | 1 | *1* | 23 | *7* | 4 |

**Q14** Does your company offer green products or services?
**(%)**

| | Yes | | No but you are planning to do so in the next 2 years | | No and you are not planning to do so | | Don't know | Total 'No' | |
|---|---|---|---|---|---|---|---|---|---|
| | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept. 2015 | Sept.2015 - Sept. 2013 |
| EU28 | 26 | 0 | 7 | 0 | 60 | 1 | 7 | 67 | 1 |
| BE | 24 | -4 | 10 | -1 | 61 | 8 | 5 | 71 | 7 |
| BG | 13 | 2 | 8 | 2 | 67 | -1 | 12 | 75 | 1 |
| CZ | 22 | 0 | 6 | 2 | 67 | 2 | 5 | 73 | 4 |
| DK | 32 | 5 | 6 | 4 | 60 | -7 | 2 | 66 | -3 |
| DE | 31 | -2 | 3 | 0 | 57 | -3 | 9 | 60 | -3 |
| EE | 24 | 5 | 2 | 1 | 70 | -4 | 4 | 72 | -3 |
| IE | 37 | 3 | 5 | -4 | 48 | -2 | 10 | 53 | -6 |
| EL | 30 | 7 | 12 | -3 | 56 | -4 | 2 | 68 | -7 |
| ES | 29 | 8 | 9 | 2 | 57 | -8 | 5 | 66 | -6 |
| FR | 34 | 4 | 12 | 7 | 52 | -7 | 2 | 64 | 0 |
| HR | 23 | -3 | 12 | -1 | 58 | 4 | 7 | 70 | 3 |
| IT | 15 | -10 | 3 | -4 | 80 | 20 | 2 | 83 | 16 |
| CY | 32 | 7 | 7 | -1 | 61 | -3 | 0 | 68 | -4 |
| LV | 17 | -2 | 8 | 1 | 71 | 1 | 4 | 79 | 2 |
| LT | 29 | 2 | 7 | 1 | 56 | -6 | 8 | 63 | -5 |
| LU | 48 | 14 | 9 | 2 | 40 | -13 | 3 | 49 | -11 |
| HU | 18 | 8 | 5 | 0 | 72 | -10 | 5 | 77 | -10 |
| MT | 23 | -6 | 4 | -3 | 71 | 12 | 2 | 75 | 9 |
| NL | 27 | 0 | 5 | 0 | 62 | 0 | 6 | 67 | 0 |
| AT | 43 | 0 | 6 | 2 | 49 | 0 | 2 | 55 | 2 |
| PL | 28 | 2 | 10 | -2 | 54 | 1 | 8 | 64 | -1 |
| PT | 26 | 1 | 12 | -1 | 41 | -8 | 21 | 53 | -9 |
| RO | 26 | 4 | 11 | -5 | 58 | 9 | 5 | 69 | 4 |
| SI | 33 | -4 | 5 | -1 | 58 | 2 | 4 | 63 | 1 |
| SK | 34 | 2 | 6 | -2 | 58 | 2 | 2 | 64 | 0 |
| FI | 36 | 12 | 3 | -5 | 58 | -2 | 3 | 61 | -7 |
| SE | 38 | 1 | 3 | -1 | 54 | 0 | 5 | 57 | -1 |
| UK | 26 | -5 | 9 | 2 | 41 | -5 | 24 | 50 | -3 |
| AL | 20 | 11 | 4 | 0 | 53 | -30 | 23 | 57 | -30 |
| MK | 12 | -4 | 18 | 16 | 43 | -37 | 27 | 61 | -21 |
| ME | 18 | -22 | 5 | -16 | 77 | 38 | 0 | 82 | 22 |
| RS | 14 | -7 | 9 | 0 | 76 | 7 | 1 | 85 | 7 |
| TR | 18 | 4 | 15 | -8 | 60 | 4 | 7 | 75 | -4 |
| IS | 38 | 6 | 10 | 2 | 45 | 2 | 7 | 55 | 4 |
| MD | 35 | N.A. | 11 | N.A. | 53 | N.A. | 1 | 64 | N.A. |
| NO | 42 | 12 | 2 | -3 | 52 | -9 | 4 | 54 | -12 |
| US | 30 | -4 | 9 | -3 | 55 | 6 | 6 | 64 | 3 |

**Q15** How much did these green products or services represent in your annual turnover of the latest available fiscal year? **(%)**

***IF CODE 1 IN Q14***

| | Up to 5% | | 6% to 10% | | 11% to 30% | | 31% to 50% | | 51% to 75% | | More than 75% | | Don't know |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 |
| EU28 | 39 | 5 | 12 | -2 | 12 | 0 | 6 | -1 | 5 | -1 | 13 | -3 | 13 |
| BE | 40 | 4 | 7 | -4 | 8 | -7 | 12 | -2 | 9 | 8 | 14 | 4 | 10 |
| BG | 42 | 17 | 0 | -16 | 14 | -7 | 2 | -12 | 6 | 3 | 16 | 7 | 20 |
| CZ | 41 | -3 | 13 | 4 | 12 | -3 | 3 | -3 | 9 | 6 | 13 | 0 | 9 |
| DK | 31 | 13 | 12 | -4 | 12 | 4 | 9 | 0 | 3 | -5 | 25 | 6 | 8 |
| DE | 29 | 1 | 20 | 6 | 17 | 8 | 6 | -7 | 0 | -7 | 14 | -6 | 14 |
| EE | 22 | -13 | 17 | 1 | 1 | -15 | 6 | 4 | 9 | 3 | 37 | 19 | 8 |
| IE | 42 | 8 | 19 | 4 | 9 | -1 | 10 | -3 | 7 | 0 | 9 | -3 | 4 |
| EL | 21 | -11 | 18 | 5 | 19 | 7 | 12 | -1 | 4 | 0 | 20 | -2 | 6 |
| ES | 51 | 18 | 11 | 2 | 7 | -10 | 3 | -1 | 3 | 0 | 8 | -9 | 17 |
| FR | 54 | 18 | 9 | -9 | 11 | 1 | 6 | -1 | 2 | -2 | 10 | 0 | 8 |
| HR | 35 | 4 | 13 | 0 | 17 | 10 | 3 | -4 | 8 | 0 | 13 | -7 | 11 |
| IT | 21 | -13 | 14 | -4 | 15 | 8 | 1 | -6 | 12 | 5 | 9 | -10 | 28 |
| CY | 27 | 1 | 15 | 1 | 10 | -5 | 5 | 1 | 8 | 4 | 30 | 15 | 5 |
| LV | 28 | -15 | 12 | -3 | 14 | 7 | 11 | 8 | 11 | 8 | 19 | -1 | 5 |
| LT | 33 | -7 | 11 | 0 | 11 | 7 | 8 | 3 | 2 | -2 | 32 | 3 | 3 |
| LU | 40 | 12 | 18 | -6 | 3 | -12 | 9 | 2 | 5 | 5 | 17 | 14 | 8 |
| HU | 45 | -5 | 25 | 12 | 3 | 0 | 1 | -1 | 8 | -9 | 14 | 5 | 4 |
| MT | 40 | 0 | 0 | -14 | 20 | 12 | 0 | 0 | 0 | -1 | 31 | 23 | 9 |
| NL | 32 | -5 | 9 | -1 | 19 | 0 | 11 | 6 | 8 | -4 | 18 | 7 | 3 |
| AT | 20 | -9 | 15 | 8 | 23 | 9 | 4 | -5 | 2 | -9 | 26 | 5 | 10 |
| PL | 36 | 3 | 8 | -2 | 19 | 8 | 2 | -6 | 3 | -3 | 18 | 1 | 14 |
| PT | 29 | -11 | 11 | -2 | 19 | 10 | 5 | -6 | 4 | -1 | 19 | 8 | 13 |
| RO | 39 | 10 | 9 | -5 | 6 | -6 | 14 | 3 | 11 | 8 | 17 | -7 | 4 |
| SI | 29 | -9 | 12 | 1 | 13 | 5 | 7 | -4 | 10 | 1 | 21 | 13 | 8 |
| SK | 24 | -9 | 11 | -1 | 17 | 3 | 11 | 6 | 8 | 4 | 17 | 3 | 12 |
| FI | 44 | 8 | 16 | 4 | 11 | -10 | 12 | 5 | 4 | 1 | 12 | -7 | 1 |
| SE | 41 | 12 | 21 | 6 | 6 | -11 | 5 | -5 | 8 | 2 | 9 | -7 | 10 |
| UK | 43 | 8 | 8 | -7 | 5 | -8 | 11 | 8 | 5 | 2 | 11 | -4 | 17 |
| AL | 10 | -40 | 28 | 16 | 9 | -26 | 0 | -3 | 0 | 0 | 17 | 17 | 36 |
| MK | 14 | 9 | 25 | 17 | 21 | -5 | 0 | 0 | 21 | 9 | 2 | -45 | 17 |
| ME | 41 | -4 | 23 | 8 | 10 | 8 | 0 | -2 | 10 | -13 | 16 | 11 | 0 |
| RS | 27 | -8 | 16 | 1 | 31 | 30 | 7 | -4 | 16 | 12 | 0 | -25 | 3 |
| TR | 55 | 22 | 15 | -8 | 11 | -5 | 3 | 3 | 8 | 1 | 5 | -11 | 3 |
| IS | 43 | 4 | 6 | -6 | 3 | -9 | 5 | -3 | 4 | 0 | 22 | 7 | 17 |
| MD | 20 | N.A. | 7 | N.A. | 17 | N.A. | 4 | N.A. | 12 | N.A. | 26 | N.A. | 14 |
| NO | 19 | -2 | 18 | 4 | 7 | -10 | 12 | 3 | 13 | 6 | 20 | 0 | 11 |
| US | 26 | -18 | 26 | 8 | 13 | 0 | 10 | 8 | 6 | 3 | 14 | 1 | 5 |

**Q16** For how long has your company been selling green products or services?
**(%)**

***IF CODE 1 IN Q14***

| | Less than one year | | Between 1 and 3 years | | More than 3 years | | Don't know |
|---|---|---|---|---|---|---|---|
| | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 |
| EU28 | 8 | 2 | 20 | -3 | 69 | 0 | 3 |
| BE | 8 | 3 | 10 | -10 | 79 | 7 | 3 |
| BG | 6 | -11 | 24 | -13 | 64 | 24 | 6 |
| CZ | 3 | -7 | 20 | 9 | 76 | -2 | 1 |
| DK | 3 | 1 | 25 | 1 | 72 | 3 | 0 |
| DE | 3 | 0 | 15 | -8 | 78 | 4 | 4 |
| EE | 7 | 5 | 12 | -5 | 81 | 1 | 0 |
| IE | 8 | 1 | 22 | 2 | 67 | -3 | 3 |
| EL | 1 | -15 | 39 | 10 | 59 | 4 | 1 |
| ES | 10 | 6 | 22 | -9 | 66 | 1 | 2 |
| FR | 9 | 4 | 22 | -15 | 60 | 3 | 9 |
| HR | 8 | -2 | 21 | -2 | 67 | 0 | 4 |
| IT | 21 | 16 | 19 | 7 | 60 | -20 | 0 |
| CY | 7 | 2 | 13 | -5 | 80 | 4 | 0 |
| LV | 9 | 5 | 21 | -13 | 70 | 11 | 0 |
| LT | 4 | -3 | 12 | -19 | 80 | 20 | 4 |
| LU | 8 | -6 | 34 | 13 | 58 | -5 | 0 |
| HU | 4 | -5 | 29 | 8 | 67 | 6 | 0 |
| MT | 0 | -5 | 16 | -11 | 82 | 19 | 2 |
| NL | 1 | -7 | 26 | -1 | 73 | 10 | 0 |
| AT | 3 | -1 | 23 | -2 | 72 | 3 | 2 |
| PL | 9 | 2 | 9 | -12 | 80 | 13 | 2 |
| PT | 5 | -6 | 23 | 0 | 70 | 12 | 2 |
| RO | 11 | -2 | 33 | -3 | 56 | 10 | 0 |
| SI | 9 | -13 | 13 | -2 | 76 | 15 | 2 |
| SK | 5 | -3 | 9 | -1 | 82 | 8 | 4 |
| FI | 2 | -4 | 21 | 0 | 77 | 4 | 0 |
| SE | 5 | -3 | 30 | 8 | 64 | -3 | 1 |
| UK | 9 | 1 | 23 | -1 | 67 | -1 | 1 |
| AL | 9 | 5 | 3 | 3 | 88 | -8 | 0 |
| MK | 2 | 1 | 41 | 38 | 55 | -41 | 2 |
| ME | 0 | -9 | 22 | -1 | 78 | 10 | 0 |
| RS | 0 | -13 | 34 | 12 | 66 | 1 | 0 |
| TR | 16 | -4 | 17 | -15 | 67 | 19 | 0 |
| IS | 7 | 3 | 19 | -9 | 72 | 9 | 2 |
| MD | 5 | N.A. | 3 | N.A. | 92 | N.A. | 0 |
| NO | 0 | -12 | 15 | -1 | 85 | 17 | 0 |
| US | 0 | -12 | 17 | -7 | 81 | 24 | 2 |

**Q17** In terms of turnover over the past 2 years, what were the main markets (countries/ geographical regions) for your green products or services? **(MULTIPLE ANSWERS POSSIBLE) (%)**

***IF CODE 1 IN Q14***

| | National market | | European Union (EU28) + Iceland + Lichtenstein + Norway + Switzerland | | Other European countries excluding Russia | | Russia | | North America countries except USA | | USA | | South America + Central America excluding Brazil | | Brazil | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 |
| EU28 | 91 | 0 | 17 | -2 | 3 | 0 | 2 | 1 | 2 | 1 | 2 | 0 | 1 | -1 | 0 | -1 |
| BE | 75 | -17 | 41 | 23 | 4 | 1 | 6 | 4 | 9 | 9 | 1 | -2 | 7 | 6 | 1 | 1 |
| BG | 92 | -2 | 22 | -3 | 4 | -3 | 2 | -5 | 0 | -1 | 0 | -1 | 0 | -1 | 0 | -1 |
| CZ | 93 | 0 | 32 | 13 | 1 | -2 | 6 | 4 | 3 | 3 | 4 | 4 | 3 | 1 | 0 | 0 |
| DK | 97 | 2 | 20 | 4 | 4 | 3 | 0 | -2 | 0 | -1 | 1 | 0 | 0 | -1 | 0 | -1 |
| DE | 92 | 3 | 17 | -2 | 5 | 1 | 0 | -1 | 0 | -1 | 1 | -1 | 0 | 0 | 0 | -1 |
| EE | 91 | 2 | 32 | -10 | 1 | -9 | 5 | 4 | 0 | 0 | 1 | 1 | 0 | 0 | 0 | 0 |
| IE | 99 | 1 | 10 | -9 | 1 | 0 | 1 | 1 | 0 | -1 | 1 | 0 | 0 | 0 | 0 | 0 |
| EL | 90 | 12 | 33 | -5 | 6 | -6 | 2 | 1 | 0 | 0 | 1 | 0 | 0 | 0 | 0 | 0 |
| ES | 98 | 6 | 9 | -10 | 2 | 1 | 2 | 0 | 3 | 2 | 3 | 2 | 6 | -4 | 0 | -4 |
| FR | 91 | 1 | 15 | -10 | 2 | -1 | 0 | -3 | 2 | -1 | 0 | -6 | 0 | -3 | 0 | -3 |
| HR | 95 | -2 | 18 | -3 | 6 | -5 | 0 | -1 | 1 | 0 | 0 | 0 | 0 | -1 | 0 | 0 |
| IT | 89 | -4 | 8 | -1 | 0 | -1 | 1 | 0 | 0 | 0 | 0 | 0 | 1 | 1 | 0 | -1 |
| CY | 73 | -5 | 48 | 26 | 8 | 7 | 0 | -1 | 2 | 0 | 0 | -2 | 0 | -4 | 0 | 0 |
| LV | 89 | 6 | 21 | -3 | 7 | 7 | 3 | 3 | 0 | 0 | 0 | -1 | 0 | 0 | 0 | 0 |
| LT | 94 | 5 | 37 | 22 | 7 | 1 | 7 | 1 | 0 | -1 | 0 | -3 | 0 | 0 | 0 | 0 |
| LU | 99 | 2 | 32 | 7 | 7 | 6 | 0 | -1 | 6 | 5 | 6 | 5 | 3 | 2 | 0 | -1 |
| HU | 76 | 0 | 40 | 4 | 6 | 6 | 1 | -1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| MT | 99 | 2 | 7 | -9 | 2 | 0 | 3 | 3 | 2 | 1 | 2 | 0 | 2 | 1 | 2 | 1 |
| NL | 85 | -10 | 28 | 6 | 6 | 3 | 1 | 0 | 0 | 0 | 2 | 0 | 1 | 0 | 0 | 0 |
| AT | 88 | 0 | 29 | 11 | 0 | -10 | 2 | 0 | 0 | -1 | 2 | -1 | 0 | -2 | 0 | 0 |
| PL | 94 | -6 | 19 | 5 | 4 | 1 | 5 | 3 | 1 | 1 | 6 | 6 | 1 | 1 | 0 | 0 |
| PT | 88 | -5 | 20 | 6 | 0 | -1 | 0 | -1 | 3 | 2 | 1 | 0 | 0 | -1 | 1 | 1 |
| RO | 91 | 0 | 13 | 3 | 0 | -1 | 0 | 0 | 0 | -2 | 0 | -1 | 0 | 0 | 0 | 0 |
| SI | 90 | 10 | 25 | -7 | 4 | -1 | 2 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| SK | 83 | -5 | 24 | 1 | 2 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| FI | 98 | 7 | 7 | -9 | 3 | 0 | 0 | 0 | 0 | 0 | 0 | -2 | 0 | -1 | 0 | 0 |
| SE | 76 | -19 | 31 | 19 | 1 | -2 | 0 | 0 | 0 | -1 | 1 | 1 | 0 | 0 | 0 | 0 |
| UK | 97 | 23 | 6 | -25 | 3 | 0 | 3 | 3 | 3 | 2 | 3 | 0 | 3 | 3 | 3 | 2 |
| AL | 96 | 31 | 20 | 20 | 1 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| MK | 100 | 1 | 5 | -20 | 2 | -22 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| ME | 100 | 2 | 11 | 3 | 10 | -1 | 0 | -4 | 0 | -4 | 0 | -4 | 0 | -4 | 0 | -4 |
| RS | 93 | 3 | 21 | 9 | 0 | -18 | 8 | 7 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| TR | 54 | -28 | 3 | -22 | 2 | 2 | 8 | 4 | 0 | 0 | 0 | 0 | 0 | -5 | 6 | 6 |
| IS | 94 | 3 | 7 | -15 | 2 | -11 | 2 | 0 | 0 | -8 | 2 | -9 | 0 | -6 | 0 | -5 |
| MD | 88 | N.A. | 11 | N.A. | 22 | N.A. | 16 | N.A. | 0 | N.A. | 2 | N.A. | 0 | N.A. | 0 | N.A. |
| NO | 81 | -14 | 25 | 14 | 0 | -4 | 0 | 0 | 0 | 0 | 3 | 2 | 0 | 0 | 0 | 0 |
| US | 13 | -86 | 2 | 0 | 0 | 0 | 0 | 0 | 3 | 2 | 86 | 86 | 0 | -1 | 0 | 0 |

**Q18** What type of support does your company rely on for the production of its green products or services? **(ROTATE - MULTIPLE ANSWERS POSSIBLE) (%)**

***IF CODE 1 IN Q14***

| | Its own financial resources | | Its own technical expertise | | External support | | Other (SP.) | | Don't know |
|---|---|---|---|---|---|---|---|---|---|
| | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 |
| EU28 | 59 | 1 | 57 | 2 | 23 | 1 | 4 | 2 | 8 |
| BE | 82 | 10 | 56 | -4 | 30 | 6 | 0 | -2 | 5 |
| BG | 64 | 4 | 57 | 14 | 24 | 13 | 0 | -13 | 15 |
| CZ | 59 | -8 | 44 | -21 | 28 | 2 | 6 | 5 | 12 |
| DK | 50 | 20 | 66 | 6 | 40 | 15 | 8 | 2 | 2 |
| DE | 60 | 6 | 50 | -7 | 22 | -9 | 6 | 2 | 12 |
| EE | 83 | -3 | 61 | -1 | 2 | -2 | 2 | -7 | 9 |
| IE | 44 | -9 | 46 | -4 | 38 | 16 | 3 | 2 | 5 |
| EL | 61 | -23 | 64 | 7 | 19 | 1 | 1 | 1 | 3 |
| ES | 52 | -15 | 52 | -4 | 15 | -6 | 2 | 1 | 10 |
| FR | 72 | 12 | 70 | 30 | 31 | 6 | 3 | 1 | 4 |
| HR | 64 | -30 | 54 | -34 | 23 | 8 | 3 | -2 | 9 |
| IT | 37 | -5 | 58 | 2 | 18 | 1 | 9 | 9 | 4 |
| CY | 86 | 6 | 30 | 3 | 11 | -5 | 0 | 0 | 0 |
| LV | 75 | 6 | 68 | 0 | 14 | 4 | 3 | 3 | 0 |
| LT | 83 | -2 | 56 | 26 | 10 | 4 | 4 | 4 | 4 |
| LU | 47 | -25 | 37 | -4 | 39 | 26 | 3 | 3 | 7 |
| HU | 57 | 3 | 57 | -10 | 26 | 10 | 14 | 8 | 8 |
| MT | 82 | 19 | 69 | 18 | 24 | -12 | 0 | -5 | 0 |
| NL | 45 | -1 | 59 | 3 | 35 | 6 | 4 | 0 | 4 |
| AT | 56 | -9 | 63 | 2 | 27 | 4 | 4 | 0 | 8 |
| PL | 77 | 10 | 71 | 8 | 9 | -6 | 2 | 2 | 0 |
| PT | 66 | 1 | 63 | 4 | 17 | 9 | 1 | 1 | 12 |
| RO | 88 | -2 | 29 | 8 | 4 | 0 | 0 | 0 | 0 |
| SI | 65 | -5 | 54 | 14 | 19 | 8 | 10 | 7 | 2 |
| SK | 57 | -12 | 46 | -10 | 8 | -2 | 4 | 3 | 13 |
| FI | 56 | 2 | 64 | 5 | 23 | -7 | 3 | 1 | 4 |
| SE | 33 | -7 | 37 | -4 | 25 | -4 | 6 | 2 | 26 |
| UK | 62 | 1 | 57 | -6 | 36 | 9 | 0 | -1 | 7 |
| AL | 96 | 34 | 51 | 51 | 26 | -28 | 0 | 0 | 0 |
| MK | 73 | -13 | 57 | 20 | 14 | 11 | 0 | 0 | 0 |
| ME | 70 | 12 | 34 | -29 | 30 | 7 | 0 | -2 | 0 |
| RS | 56 | -12 | 50 | -5 | 27 | 18 | 6 | 6 | 11 |
| TR | 85 | -1 | 44 | 22 | 14 | 12 | 0 | 0 | 0 |
| IS | 49 | -16 | 46 | -10 | 31 | 8 | 4 | 2 | 18 |
| MD | 80 | N.A. | 24 | N.A. | 10 | N.A. | 0 | N.A. | 3 |
| NO | 42 | -18 | 38 | -19 | 22 | -6 | 15 | 13 | 11 |
| US | 49 | -9 | 52 | 4 | 41 | -1 | 0 | 0 | 6 |

**Q19** Which type of external support does your company get for the production of its green products or services? **(ROTATE - MULTIPLE ANSWERS POSSIBLE) (%)**

***IF CODE 3 IN Q18***

| | Public funding such as grants, guarantees or loans | | Private funding from a bank, investment company or venture capital fund | | Private funding from friends or relatives | | Advice or other non-financial assistance from public administration | | Advice or other non-financial assistance from private consulting and audit companies | | Advice or other non-financial assistance from business associations | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 |
| EU28 | 12 | -2 | 15 | -3 | 3 | -3 | 13 | -5 | 23 | -13 | 27 | -4 |
| BE | 15 | -6 | 48 | 28 | 27 | 25 | 11 | -5 | 12 | -23 | 20 | -25 |
| BG | 10 | 4 | 9 | -15 | 0 | -12 | 9 | 3 | 17 | 11 | 25 | 19 |
| CZ | 44 | 23 | 26 | -11 | 0 | -13 | 21 | -4 | 25 | -22 | 15 | 5 |
| DK | 12 | 9 | 11 | 0 | 5 | 5 | 18 | 17 | 28 | 1 | 37 | 8 |
| DE | 10 | -11 | 12 | -19 | 0 | -8 | 18 | -4 | 24 | -2 | 5 | -33 |
| EE | 34 | -57 | 33 | 5 | 0 | 0 | 0 | 0 | 33 | 24 | 33 | 24 |
| IE | 5 | -9 | 13 | 11 | 9 | 9 | 23 | 10 | 37 | -6 | 46 | -10 |
| EL | 3 | -48 | 43 | 28 | 14 | 12 | 0 | -23 | 36 | -13 | 17 | -42 |
| ES | 1 | -19 | 10 | -23 | 3 | -17 | 0 | -19 | 31 | -14 | 16 | -17 |
| FR | 12 | -1 | 7 | -7 | 6 | 6 | 9 | -20 | 22 | 3 | 34 | -1 |
| HR | 28 | -12 | 34 | 16 | 12 | 12 | 2 | -27 | 0 | -18 | 12 | -2 |
| IT | 0 | 0 | 28 | 27 | 0 | 0 | 8 | 8 | 29 | -48 | 23 | 7 |
| CY | 34 | 34 | 65 | 35 | 0 | 0 | 0 | 0 | 2 | -12 | 0 | -14 |
| LV | 46 | 38 | 17 | 9 | 25 | 25 | 20 | -19 | 0 | -89 | 49 | 45 |
| LT | 28 | -20 | 63 | -27 | 18 | -20 | 4 | -1 | 7 | 2 | 29 | -19 |
| LU | 13 | 8 | 20 | 20 | 8 | -6 | 31 | 4 | 13 | -5 | 46 | 0 |
| HU | 11 | 7 | 6 | -2 | 0 | -4 | 15 | -9 | 30 | 17 | 36 | -19 |
| MT | 0 | -14 | 10 | -7 | 0 | 0 | 22 | 5 | 6 | -3 | 28 | -20 |
| NL | 6 | -9 | 12 | 10 | 1 | -5 | 3 | -13 | 34 | -20 | 20 | -36 |
| AT | 18 | 11 | 12 | -2 | 0 | -11 | 15 | -8 | 24 | 5 | 24 | -15 |
| PL | 21 | -5 | 19 | -3 | 0 | -20 | 40 | 36 | 21 | 10 | 2 | -15 |
| PT | 29 | 16 | 33 | 17 | 0 | 0 | 2 | -1 | 7 | -12 | 44 | 34 |
| RO | 0 | -8 | 27 | 3 | 23 | 23 | 0 | -60 | 23 | -1 | 27 | -41 |
| SI | 15 | -19 | 17 | -9 | 0 | -7 | 11 | 4 | 9 | -5 | 33 | 11 |
| SK | 28 | 4 | 0 | -11 | 12 | -11 | 28 | 4 | 12 | -29 | 18 | 13 |
| FI | 6 | -6 | 20 | -1 | 0 | -10 | 38 | 23 | 34 | -17 | 26 | -13 |
| SE | 2 | -12 | 15 | -10 | 1 | 1 | 15 | 11 | 10 | -16 | 23 | 7 |
| UK | 12 | 4 | 15 | 8 | 1 | -2 | 22 | -11 | 19 | -15 | 54 | 18 |
| AL | 0 | -22 | 0 | -78 | 0 | -6 | 0 | 0 | 0 | -7 | 0 | 0 |
| MK | 0 | -30 | 0 | 0 | 0 | -40 | 0 | -70 | 0 | 0 | 0 | 0 |
| ME | 21 | 21 | 39 | -5 | 0 | 0 | 21 | 21 | 21 | 21 | 60 | 18 |
| RS | 0 | -16 | 24 | 24 | 42 | 42 | 18 | 2 | 0 | -19 | 17 | -13 |
| TR | 24 | -35 | 84 | 25 | 0 | 0 | 25 | -34 | 16 | 16 | 24 | -35 |
| IS | 6 | 6 | 3 | -9 | 3 | 3 | 12 | 5 | 18 | -17 | 26 | 24 |
| MD | 0 | N.A. | 46 | N.A. | 43 | N.A. | 0 | N.A. | 43 | N.A. | 0 | N.A. |
| NO | 17 | -11 | 3 | -15 | 0 | 0 | 3 | -10 | 24 | -11 | 6 | -10 |
| US | 7 | 1 | 21 | 5 | 5 | 0 | 5 | -13 | 34 | 3 | 43 | -21 |

**Q19** Which type of external support does your company get for the production of its green products or services? **(ROTATE - MULTIPLE ANSWERS POSSIBLE) (%)**

***IF CODE 3 IN Q18***

| | Other (SP.) | | Don't know | Total 'Public sector' | | Total 'Private sector' | |
|---|---|---|---|---|---|---|---|
| | Sept. 2015 | *Sept.2015 - Sept. 2013* | Sept. 2015 | Sept. 2015 | *Sept.2015 - Sept. 2013* | Sept. 2015 | *Sept.2015 - Sept. 2013* |
| EU28 | 26 | *10* | 10 | 23 | *-3* | 56 | *-13* |
| BE | 11 | *-4* | 5 | 24 | *-11* | 75 | *9* |
| BG | 24 | *18* | 24 | 19 | *7* | 42 | *6* |
| CZ | 0 | *-10* | 10 | 64 | *24* | 50 | *-27* |
| DK | 40 | *15* | 5 | 22 | *19* | 52 | *-12* |
| DE | 55 | *35* | 8 | 24 | *-6* | 30 | *-36* |
| EE | 33 | *33* | 0 | 34 | *-57* | 66 | *38* |
| IE | 13 | *-6* | 13 | 23 | *-2* | 69 | *-10* |
| EL | 6 | *4* | 0 | 3 | *-50* | 91 | *-1* |
| ES | 31 | *27* | 19 | 1 | *-29* | 51 | *-30* |
| FR | 25 | *8* | 7 | 20 | *-15* | 66 | *9* |
| HR | 26 | *20* | 5 | 30 | *-38* | 47 | *9* |
| IT | 9 | *-2* | 11 | 8 | *8* | 80 | *-11* |
| CY | 0 | *-4* | 0 | 34 | *34* | 66 | *19* |
| LV | 25 | *25* | 0 | 46 | *3* | 74 | *-22* |
| LT | 28 | *28* | 6 | 28 | *-24* | 72 | *-23* |
| LU | 8 | *-24* | 9 | 40 | *8* | 71 | *7* |
| HU | 13 | *9* | 26 | 15 | *-13* | 50 | *-22* |
| MT | 33 | *17* | 33 | 22 | *-7* | 34 | *-35* |
| NL | 34 | *26* | 20 | 9 | *-19* | 44 | *-42* |
| AT | 38 | *2* | 4 | 28 | *0* | 50 | *-4* |
| PL | 39 | *16* | 0 | 41 | *14* | 40 | *-26* |
| PT | 24 | *-17* | 4 | 32 | *16* | 69 | *43* |
| RO | 50 | *50* | 0 | 0 | *-60* | 50 | *-50* |
| SI | 32 | *25* | 3 | 26 | *-12* | 59 | *0* |
| SK | 29 | *8* | 12 | 28 | *1* | 31 | *-19* |
| FI | 21 | *20* | 8 | 41 | *14* | 55 | *-23* |
| SE | 36 | *19* | 15 | 17 | *2* | 40 | *-25* |
| UK | 15 | *-6* | 8 | 34 | *0* | 64 | *7* |
| AL | 0 | *0* | 100 | 0 | *-22* | 0 | *-78* |
| MK | 100 | *100* | 0 | 0 | *-100* | 0 | *-40* |
| ME | 0 | *-14* | 0 | 21 | *21* | 100 | *14* |
| RS | 28 | *9* | 13 | 18 | *-13* | 59 | *9* |
| TR | 0 | *-41* | 0 | 25 | *-34* | 100 | *41* |
| IS | 28 | *23* | 29 | 17 | *10* | 29 | *-19* |
| MD | 54 | *N.A.* | 0 | 0 | *N.A.* | 90 | *N.A.* |
| NO | 30 | *-1* | 26 | 18 | *-13* | 29 | *-26* |
| US | 4 | *-10* | 26 | 12 | *-11* | 70 | *-1* |

**Q20** How satisfied or dissatisfied are you with the level of public support for your green products or services? **(%)**

***IF CODE 1 OR 4 IN Q19***

| | Very satisfied | | Fairly satisfied | | Fairly dissatisfied | | Very dissatisfied | | Don't know | Total 'Satisfied' | | Total 'Dissatisfied' | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 |
| EU28 | 5 | -5 | 61 | 9 | 26 | 5 | 5 | -3 | 3 | 66 | 4 | 31 | 2 |
| BE | 0 | -33 | 100 | 79 | 0 | -43 | 0 | -3 | 0 | 100 | 46 | 0 | -46 |
| BG | 0 | 0 | 93 | 93 | 7 | -43 | 0 | -50 | 0 | 93 | 93 | 7 | -93 |
| CZ | 16 | 16 | 67 | 14 | 17 | -30 | 0 | 0 | 0 | 83 | 30 | 17 | -30 |
| DK | 0 | 0 | 46 | -21 | 36 | 36 | 13 | 13 | 5 | 46 | -21 | 49 | 49 |
| DE | 0 | -7 | 62 | -2 | 14 | 3 | 14 | 14 | 10 | 62 | -9 | 28 | 17 |
| EE | 5 | -5 | 95 | 5 | 0 | 0 | 0 | 0 | 0 | 100 | 0 | 0 | 0 |
| IE | 20 | -21 | 80 | 65 | 0 | -44 | 0 | 0 | 0 | 100 | 44 | 0 | -44 |
| EL | 0 | 0 | 0 | -37 | 100 | 47 | 0 | -7 | 0 | 0 | -37 | 100 | 40 |
| ES | 0 | 0 | 0 | -40 | 95 | 91 | 5 | -51 | 0 | 0 | -40 | 100 | 40 |
| FR | 0 | 0 | 71 | 21 | 29 | 1 | 0 | 0 | 0 | 71 | 21 | 29 | 1 |
| HR | 0 | -3 | 36 | -14 | 64 | 37 | 0 | -3 | 0 | 36 | -17 | 64 | 34 |
| IT | 0 | 0 | 0 | 0 | 100 | 100 | 0 | 0 | 0 | 0 | 0 | 100 | 100 |
| CY | 0 | 0 | 95 | 95 | 0 | 0 | 5 | 5 | 0 | 95 | 95 | 5 | 5 |
| LV | 0 | 0 | 7 | 7 | 93 | -7 | 0 | 0 | 0 | 7 | 7 | 93 | -7 |
| LT | 64 | 64 | 24 | -67 | 12 | 3 | 0 | 0 | 0 | 88 | -3 | 12 | 3 |
| LU | 1 | 1 | 72 | 44 | 27 | -29 | 0 | -16 | 0 | 73 | 45 | 27 | -45 |
| HU | 0 | 0 | 99 | 14 | 1 | -14 | 0 | 0 | 0 | 99 | 14 | 1 | -14 |
| MT | 1 | 1 | 99 | 41 | 0 | 0 | 0 | -42 | 0 | 100 | 42 | 0 | -42 |
| NL | 0 | 0 | 85 | 22 | 15 | -22 | 0 | 0 | 0 | 85 | 22 | 15 | -22 |
| AT | 5 | -4 | 48 | -9 | 26 | -8 | 21 | 21 | 0 | 53 | -13 | 47 | 13 |
| PL | 0 | -24 | 53 | 21 | 47 | 8 | 0 | 0 | 0 | 53 | -3 | 47 | 8 |
| PT | 0 | 0 | 100 | 0 | 0 | 0 | 0 | 0 | 0 | 100 | 0 | 0 | 0 |
| RO | 0 | 0 | 0 | -100 | 0 | 0 | 0 | 0 | 0 | 0 | -100 | 0 | 0 |
| SI | 0 | -54 | 33 | -13 | 57 | 57 | 10 | 10 | 0 | 33 | -67 | 67 | 67 |
| SK | 0 | 0 | 0 | -8 | 100 | 8 | 0 | 0 | 0 | 0 | -8 | 100 | 8 |
| FI | 0 | 0 | 49 | -19 | 26 | 1 | 6 | 6 | 19 | 49 | -19 | 32 | 7 |
| SE | 0 | 0 | 6 | -22 | 42 | 18 | 52 | 4 | 0 | 6 | -22 | 94 | 22 |
| UK | 12 | -30 | 57 | -1 | 20 | 20 | 3 | 3 | 8 | 69 | -31 | 23 | 23 |
| AL | 0 | 0 | 0 | -100 | 0 | 0 | 0 | 0 | 0 | 0 | -100 | 0 | 0 |
| MK | 0 | 0 | 0 | -100 | 0 | 0 | 0 | 0 | 0 | 0 | -100 | 0 | 0 |
| ME | 98 | 98 | 2 | 2 | 0 | 0 | 0 | 0 | 0 | 100 | 100 | 0 | 0 |
| RS | 1 | 1 | 99 | 74 | 0 | -50 | 0 | -25 | 0 | 100 | 75 | 0 | -75 |
| TR | 0 | 0 | 99 | 99 | 0 | 0 | 1 | 1 | 0 | 99 | 99 | 1 | 1 |
| IS | 0 | 0 | 68 | 34 | 0 | 0 | 0 | 0 | 32 | 68 | 34 | 0 | 0 |
| NO | 0 | -9 | 83 | -1 | 17 | 17 | 0 | 0 | 0 | 83 | -10 | 17 | 17 |
| US | 57 | 18 | 20 | -10 | 0 | -16 | 23 | 10 | 0 | 77 | 8 | 23 | -6 |

**Q21a** What type of support would help you the most to expand your range of green products or services ? **(ROTATE - MAX. 2 ANSWERS) (%)**

***IF CODE 1 IN Q14***

| | Financial incentives for developing products, services or new production processes | | Assistance with identifying potential markets or customers | | Technical support and consultancy for the development of products, services and production processes | | Consultancy services for marketing or distribution | | Other (SP.) | | None (SP.) | | Don't know |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 |
| EU28 | 35 | -11 | 32 | 5 | 28 | 6 | 23 | 4 | 2 | -2 | 18 | 6 | 5 |
| BE | 34 | -3 | 35 | 10 | 28 | -12 | 24 | -2 | 1 | -3 | 21 | 15 | 4 |
| BG | 54 | 18 | 22 | -8 | 29 | 1 | 23 | 7 | 0 | -1 | 14 | 12 | 2 |
| CZ | 43 | 9 | 38 | 7 | 24 | 6 | 17 | -9 | 3 | -3 | 15 | -6 | 3 |
| DK | 36 | 0 | 28 | 13 | 31 | 10 | 16 | -12 | 4 | 2 | 24 | -1 | 2 |
| DE | 26 | -8 | 27 | 3 | 16 | -5 | 28 | 2 | 6 | 4 | 15 | -8 | 11 |
| EE | 36 | -4 | 37 | -13 | 16 | -3 | 18 | 0 | 6 | 0 | 13 | 2 | 6 |
| IE | 52 | 6 | 46 | 5 | 19 | -1 | 19 | -1 | 2 | 0 | 4 | -2 | 3 |
| EL | 62 | 6 | 46 | -1 | 24 | -6 | 15 | -3 | 0 | -1 | 4 | -1 | 1 |
| ES | 22 | -31 | 43 | 9 | 32 | 4 | 19 | 0 | 0 | -2 | 17 | 11 | 7 |
| FR | 46 | 11 | 32 | 9 | 49 | 17 | 30 | 12 | 0 | -1 | 7 | -7 | 2 |
| HR | 52 | -14 | 20 | -5 | 32 | 0 | 24 | 16 | 4 | 2 | 4 | 0 | 12 |
| IT | 30 | -33 | 21 | 6 | 27 | 19 | 16 | 1 | 1 | -9 | 33 | 26 | 2 |
| CY | 75 | 27 | 25 | -4 | 18 | 10 | 24 | 22 | 0 | -4 | 11 | -4 | 0 |
| LV | 39 | -21 | 36 | 23 | 30 | 12 | 22 | 0 | 4 | 1 | 7 | 0 | 0 |
| LT | 55 | 3 | 24 | 13 | 19 | -1 | 20 | 3 | 2 | -5 | 9 | -3 | 13 |
| LU | 32 | -19 | 29 | 0 | 29 | 16 | 33 | 14 | 3 | 0 | 14 | 4 | 0 |
| HU | 50 | 1 | 20 | -15 | 15 | 9 | 23 | 9 | 5 | -8 | 13 | 8 | 0 |
| MT | 46 | 2 | 25 | -7 | 18 | -1 | 52 | 35 | 0 | 0 | 12 | -11 | 0 |
| NL | 35 | 17 | 36 | -6 | 15 | -13 | 17 | -2 | 0 | -7 | 19 | 3 | 5 |
| AT | 41 | 6 | 24 | 1 | 22 | -5 | 31 | 3 | 6 | 2 | 11 | -10 | 4 |
| PL | 44 | -22 | 24 | 2 | 20 | -2 | 21 | 4 | 4 | 2 | 17 | 11 | 7 |
| PT | 29 | -10 | 46 | 0 | 24 | -6 | 29 | 13 | 0 | -3 | 16 | 2 | 6 |
| RO | 57 | -1 | 23 | 5 | 26 | 3 | 23 | 1 | 1 | -7 | 11 | 8 | 1 |
| SI | 52 | -15 | 19 | 3 | 25 | 15 | 19 | 6 | 5 | 3 | 12 | 6 | 0 |
| SK | 40 | -6 | 29 | -5 | 15 | -8 | 15 | -1 | 3 | 2 | 12 | 5 | 9 |
| FI | 30 | -8 | 32 | 1 | 27 | -1 | 36 | 9 | 4 | 2 | 9 | 0 | 4 |
| SE | 35 | 1 | 29 | 3 | 31 | 11 | 21 | 3 | 0 | -6 | 23 | 9 | 2 |
| UK | 21 | -23 | 38 | -4 | 20 | 0 | 16 | -1 | 0 | 0 | 33 | 16 | 9 |
| AL | 20 | -11 | 19 | 15 | 0 | 0 | 39 | 39 | 15 | -20 | 5 | -30 | 19 |
| MK | 85 | -2 | 11 | -24 | 58 | 25 | 15 | -20 | 0 | 0 | 0 | -1 | 0 |
| ME | 51 | -29 | 21 | 8 | 17 | -10 | 12 | 2 | 0 | -1 | 11 | 9 | 16 |
| RS | 56 | -12 | 57 | 31 | 11 | 7 | 5 | -6 | 0 | -3 | 12 | 2 | 0 |
| TR | 65 | 12 | 29 | -7 | 32 | 7 | 24 | -9 | 0 | -1 | 2 | 1 | 0 |
| IS | 36 | 2 | 27 | 2 | 36 | 13 | 14 | -1 | 0 | -7 | 4 | 1 | 26 |
| MD | 46 | N.A. | 23 | N.A. | 33 | N.A. | 20 | N.A. | 24 | N.A. | 5 | N.A. | 0 |
| NO | 42 | -3 | 23 | 0 | 18 | -8 | 18 | -3 | 5 | 0 | 15 | 3 | 6 |
| US | 45 | 3 | 28 | -11 | 26 | -3 | 13 | -11 | 0 | -1 | 16 | 3 | 4 |

**Q21b** What type of support would help you the most to launch your range of green products or services ? **(ROTATE - MAX. 2 ANSWERS) (%)**

***IF CODE 2 OR 3 IN Q14***

| | Financial incentives for developing products, services or new production processes | | Assistance with identifying potential markets or customers | | Technical support and consultancy for the development of products, services and production processes | | Consultancy services for marketing or distribution | | Other (SP.) | | None (SP.) | | Don't know |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Sept. 2015 | Sept. 2015 - Sept. 2013 | Sept. 2015 | Sept. 2015 - Sept. 2013 | Sept. 2015 | Sept. 2015 - Sept. 2013 | Sept. 2015 | Sept. 2015 - Sept. 2013 | Sept. 2015 | Sept. 2015 - Sept. 2013 | Sept. 2015 | Sept. 2015 - Sept. 2013 | Sept. 2015 |
| EU28 | 25 | -4 | 19 | 2 | 15 | -1 | 12 | 0 | 2 | 0 | 46 | 9 | 5 |
| BE | 26 | -1 | 22 | -1 | 22 | 0 | 20 | 3 | 0 | 0 | 39 | 7 | 5 |
| BG | 25 | -13 | 9 | 0 | 12 | 1 | 19 | 0 | 3 | -2 | 41 | 18 | 9 |
| CZ | 22 | 4 | 13 | 1 | 16 | 1 | 12 | 0 | 1 | 0 | 52 | 8 | 6 |
| DK | 27 | 5 | 12 | 2 | 15 | 6 | 6 | -1 | 2 | -5 | 57 | 9 | 3 |
| DE | 16 | -8 | 16 | 0 | 9 | 0 | 13 | 0 | 6 | 6 | 46 | -2 | 12 |
| EE | 13 | -4 | 14 | 3 | 5 | -3 | 5 | -4 | 7 | -7 | 64 | 18 | 3 |
| IE | 34 | 4 | 29 | -2 | 23 | 4 | 8 | -5 | 1 | -1 | 22 | 7 | 14 |
| EL | 42 | -6 | 27 | 2 | 25 | -2 | 9 | -15 | 4 | 4 | 29 | 7 | 0 |
| ES | 28 | -2 | 30 | 3 | 22 | 0 | 15 | 4 | 1 | 0 | 34 | 1 | 2 |
| FR | 45 | 18 | 39 | 23 | 25 | 4 | 17 | 7 | 1 | -1 | 20 | -12 | 2 |
| HR | 32 | -6 | 17 | 8 | 11 | -11 | 14 | 0 | 4 | 0 | 43 | 0 | 5 |
| IT | 9 | -19 | 8 | -6 | 4 | -7 | 5 | -8 | 0 | -6 | 76 | 35 | 5 |
| CY | 29 | 11 | 11 | 4 | 4 | -2 | 15 | -1 | 1 | 0 | 59 | 5 | 0 |
| LV | 29 | -5 | 14 | -5 | 18 | -1 | 15 | 1 | 4 | 3 | 42 | 13 | 3 |
| LT | 20 | -15 | 19 | 4 | 14 | -4 | 13 | -3 | 2 | -1 | 41 | 6 | 13 |
| LU | 35 | 16 | 19 | 1 | 24 | 17 | 27 | 13 | 1 | -5 | 28 | -9 | 0 |
| HU | 23 | -9 | 7 | -7 | 12 | 3 | 9 | 2 | 3 | -1 | 58 | 9 | 2 |
| MT | 29 | 13 | 13 | 5 | 15 | 4 | 8 | -3 | 1 | -6 | 43 | -16 | 5 |
| NL | 17 | 10 | 15 | -2 | 16 | 7 | 11 | 4 | 2 | 0 | 53 | -7 | 3 |
| AT | 20 | 4 | 21 | 9 | 17 | 8 | 15 | 6 | 5 | 3 | 49 | -14 | 1 |
| PL | 45 | 2 | 15 | 2 | 23 | 0 | 16 | 0 | 1 | -1 | 30 | 3 | 3 |
| PT | 32 | 0 | 27 | 6 | 28 | 4 | 20 | 1 | 1 | 0 | 29 | 2 | 6 |
| RO | 36 | 1 | 15 | -8 | 18 | 0 | 18 | 1 | 4 | 2 | 32 | 11 | 5 |
| SI | 28 | -3 | 11 | 3 | 11 | 0 | 13 | -1 | 5 | 4 | 44 | -5 | 3 |
| SK | 18 | -16 | 20 | -2 | 10 | -8 | 16 | 0 | 1 | -1 | 39 | 8 | 10 |
| FI | 32 | -2 | 11 | -3 | 16 | -1 | 14 | -2 | 1 | 1 | 42 | 7 | 2 |
| SE | 17 | 0 | 17 | 4 | 17 | 1 | 8 | 2 | 3 | -3 | 50 | 10 | 8 |
| UK | 33 | -5 | 19 | 3 | 19 | 5 | 10 | -2 | 3 | 2 | 32 | 4 | 13 |
| AL | 7 | -55 | 20 | -2 | 0 | -10 | 1 | -3 | 13 | 13 | 60 | 37 | 2 |
| MK | 36 | 2 | 11 | -2 | 20 | -3 | 37 | 17 | 3 | 3 | 32 | -4 | 2 |
| ME | 38 | -13 | 22 | -3 | 22 | 6 | 20 | 1 | 6 | -2 | 31 | 23 | 0 |
| RS | 32 | 14 | 13 | 4 | 15 | 4 | 6 | 1 | 0 | -5 | 50 | -9 | 6 |
| TR | 42 | 8 | 40 | 5 | 37 | 15 | 28 | 2 | 0 | -1 | 11 | 0 | 2 |
| IS | 29 | 2 | 18 | 2 | 16 | 0 | 16 | 8 | 5 | 2 | 15 | 9 | 29 |
| MD | 27 | N.A. | 18 | N.A. | 14 | N.A. | 17 | N.A. | 16 | N.A. | 31 | N.A. | 3 |
| NO | 18 | -3 | 22 | 12 | 2 | -18 | 13 | 2 | 3 | 2 | 47 | 9 | 8 |
| US | 27 | -4 | 22 | -6 | 12 | -8 | 15 | -3 | 2 | 1 | 35 | 4 | 13 |

**Q22** In your company, how many of your full time employees, including yourself, work in green jobs some or all of the time?
**(%)**

| | 0 employee | | 1 to 5 employees | | 6 to 9 employees | | 10 to 50 employees | | 51 to 100 employees | | 101 or more employees | | Don't know | At least one employee | | Average | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept. 2015 | Sept.2015 - Sept. 2013 | Sept. 2015 | Sept.2015 - Sept. 2013 |
| EU28 | 60 | 8 | 29 | -6 | 3 | 0 | 2 | -1 | 0 | 0 | 0 | 0 | 5 | 35 | -7 | 5,3 | 0,5 |
| BE | 67 | 9 | 21 | -9 | 3 | 1 | 2 | -1 | 0 | 0 | 0 | 0 | 6 | 27 | -9 | 7,6 | 2,7 |
| BG | 53 | -14 | 26 | 7 | 2 | 1 | 7 | 3 | 1 | 1 | 0 | 0 | 11 | 36 | 11 | 8,5 | 0,9 |
| CZ | 77 | 12 | 18 | -8 | 0 | -3 | 1 | -2 | 1 | 1 | 0 | 0 | 3 | 20 | -12 | 5,8 | 1,1 |
| DK | 70 | 0 | 23 | 1 | 1 | -2 | 2 | -1 | 1 | 1 | 0 | -1 | 3 | 27 | -2 | 5,9 | -2,1 |
| DE | 62 | 3 | 22 | -7 | 2 | 1 | 3 | -2 | 0 | -1 | 0 | 0 | 11 | 27 | -10 | 12,7 | 5,0 |
| EE | 83 | -3 | 13 | 3 | 0 | 0 | 1 | 0 | 0 | 0 | 0 | 0 | 3 | 14 | 3 | 3,0 | -2,6 |
| IE | 56 | 3 | 35 | -1 | 5 | 3 | 2 | -1 | 0 | 0 | 0 | 0 | 3 | 41 | 0 | 3,3 | -0,8 |
| EL | 51 | -2 | 35 | -4 | 7 | 6 | 6 | 1 | 0 | -1 | 0 | 0 | 1 | 48 | 3 | 5,8 | -1,3 |
| ES | 25 | -19 | 59 | 12 | 5 | 2 | 3 | 0 | 0 | 0 | 0 | 0 | 8 | 67 | 13 | 3,2 | -0,6 |
| FR | 72 | 4 | 24 | -3 | 1 | -1 | 2 | 1 | 1 | 1 | 0 | 0 | 0 | 28 | -2 | 7,1 | 4,5 |
| HR | 44 | 40 | 36 | -18 | 5 | -2 | 4 | -2 | 0 | -1 | 0 | 0 | 11 | 45 | -23 | 5,9 | 0,7 |
| IT | 69 | 30 | 25 | -23 | 4 | 0 | 1 | -2 | 0 | 0 | 0 | 0 | 1 | 30 | -26 | 3,3 | -0,4 |
| CY | 63 | -9 | 26 | 4 | 7 | 6 | 2 | 2 | 0 | 0 | 0 | 0 | 2 | 35 | 12 | 5,8 | 2,9 |
| LV | 42 | -1 | 41 | 4 | 3 | 0 | 3 | -3 | 0 | -1 | 0 | 0 | 11 | 47 | 0 | 4,0 | -2,5 |
| LT | 76 | 2 | 16 | 3 | 1 | -2 | 2 | 1 | 0 | 0 | 0 | 0 | 4 | 19 | 2 | 6,9 | 2,1 |
| LU | 54 | 2 | 36 | 1 | 4 | 1 | 2 | -1 | 2 | 2 | 0 | -1 | 1 | 44 | 2 | 5,2 | -1,3 |
| HU | 72 | -5 | 16 | -1 | 5 | 3 | 1 | 0 | 1 | 1 | 0 | 0 | 5 | 22 | 1 | 7,0 | 2,2 |
| MT | 63 | -16 | 20 | 4 | 5 | 4 | 2 | 0 | 2 | 2 | 0 | 0 | 8 | 29 | 10 | 7,5 | 1,2 |
| NL | 67 | 2 | 20 | -7 | 1 | 0 | 2 | 1 | 2 | 2 | 0 | 0 | 8 | 25 | -4 | 9,2 | 5,7 |
| AT | 60 | -1 | 26 | -1 | 4 | 2 | 4 | 0 | 0 | 0 | 0 | 0 | 6 | 34 | 1 | 4,5 | -1,9 |
| PL | 56 | 12 | 29 | -10 | 3 | 0 | 2 | -1 | 0 | 0 | 0 | 0 | 10 | 34 | -12 | 3,8 | -1,5 |
| PT | 60 | 7 | 29 | -5 | 5 | 0 | 1 | -1 | 0 | 0 | 0 | 0 | 5 | 35 | -6 | 3,2 | -1,4 |
| RO | 51 | 0 | 31 | 3 | 4 | -1 | 5 | 0 | 0 | -1 | 1 | 1 | 8 | 41 | 2 | 8,9 | 0,5 |
| SI | 62 | 9 | 31 | -3 | 2 | -1 | 2 | -2 | 0 | 0 | 0 | 0 | 3 | 35 | -7 | 4,7 | -0,5 |
| SK | 36 | 4 | 44 | 1 | 3 | -5 | 5 | -1 | 0 | -1 | 0 | 0 | 11 | 52 | -6 | 9,9 | 4,3 |
| FI | 45 | 0 | 44 | 2 | 3 | -1 | 3 | 1 | 0 | -1 | 0 | 0 | 5 | 50 | 0 | 3,2 | -2,3 |
| SE | 57 | 18 | 30 | -11 | 6 | 2 | 3 | -3 | 0 | -1 | 0 | 0 | 5 | 39 | -13 | 4,8 | -1,7 |
| UK | 69 | 12 | 24 | -4 | 0 | -3 | 2 | -3 | 0 | 0 | 0 | 0 | 4 | 27 | -9 | 4,1 | -2,3 |
| AL | 83 | 55 | 8 | -56 | 4 | 3 | 5 | -3 | 0 | 0 | 0 | 0 | 0 | 17 | -55 | 9,1 | 6,2 |
| MK | 79 | 4 | 13 | -3 | 1 | 0 | 2 | 1 | 0 | 0 | 0 | 0 | 4 | 17 | -1 | 7,0 | 2,4 |
| ME | 60 | 35 | 27 | -16 | 3 | -9 | 6 | -8 | 2 | -2 | 0 | 0 | 2 | 38 | -36 | 8,5 | -4,5 |
| RS | 52 | -2 | 28 | 6 | 5 | 2 | 10 | 7 | 0 | -1 | 0 | 0 | 5 | 42 | 12 | 9,9 | 2,5 |
| TR | 73 | -5 | 18 | 7 | 1 | 0 | 6 | 4 | 0 | 0 | 0 | 0 | 2 | 25 | 11 | 6,6 | -0,6 |
| IS | 43 | 7 | 35 | -3 | 7 | 5 | 4 | -1 | 0 | 0 | 0 | 0 | 10 | 47 | 2 | 6,8 | 1,1 |
| MD | 36 | N.A. | 32 | N.A. | 4 | N.A. | 13 | N.A. | 1 | N.A. | 1 | N.A. | 13 | 52 | N.A. | 12,3 | N.A. |
| NO | 45 | -11 | 39 | 9 | 2 | -3 | 4 | 0 | 2 | 0 | 1 | 1 | 6 | 48 | 8 | 9,6 | 1,4 |
| US | 48 | -3 | 38 | 4 | 1 | 0 | 3 | -3 | 0 | 0 | 0 | -1 | 9 | 43 | 1 | 3,4 | -4,8 |