Flash Eurobarometer 342

# SMES, RESOURCE EFFICIENCY AND GREEN MARKETS

## REPORT

Fieldwork: January - Ferbruary 2012

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This survey has been requested by Directorate-General Enterprise and Industry and co-ordinated by Directorate-General for Communication (DG COMM "Research and Speechwriting" Unit).



**Flash Eurobarometer 342 - TNS Political & Social**

Eurobarometer

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# SMEs, Resource Efficiency and Green Markets

Conducted by TNS Political & Social at the request of Directorate-General Enterprise and Industry

Survey co-ordinated by Directorate-General for Communication

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## SURVEY DESCRIPTION

This report presents the results of the Flash Eurobarometer 342 survey ‘SMES towards resource efficiency & green markets", carried out between the 24th of January and the 10th of February 2012. This survey has been requested by the EUROPEAN COMMISSION, Directorate-General for Enterprise and Industry.
It is a business to business survey co-ordinated by the Directorate-General for Communication ("Research and Speechwriting" Unit). This survey covers businesses employing 1 or more persons in the Manufacturing (Nace category C), Retail (Nace category G), Services (Nace categories I/J/K/H/L/M/) and Industry (Nace categories B/D/E/F) sectors within the European Union.

This Flash Eurobarometer was carried out by TNS Political & Social. It was conducted in the 27 EU Member States and in Albania, Croatia, Iceland, Liechtenstein, the Former Yugoslav Republic of Macedonia, Montenegro, Norway, the Republic of Serbia, Turkey, Israel and the United States where the same target group was interviewed. All interviews were carried using the TNS e-Call center (our centralized CATI system) except in Albania, Israel, Montenegro and the Republic of Serbia where the local infrastructures (call centers) were used. The sample was selected from an international business database, with some additional sample from local sources in countries where necessary.

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*The Eurobarometer web site can be consulted at the following address:*
*http://ec.europa.eu/public_opinion/index_en.htm*

*We would like to take the opportunity to thank all the respondents across the continent who gave their time to take part in this survey.*
*Without their active participation, this study would simply not have been possible.*

Note

## ABBREVIATIONS

| | |
|---|---|
| EU27 | European Union – 27 Member States |
| DK/NA | Don’t know / No answer |
| BE | Belgium |
| BG | Bulgaria |
| CZ | Czech Republic |
| DK | Denmark |
| DE | Germany |
| EE | Estonia |
| EL | Greece |
| ES | Spain |
| FR | France |
| IE | Ireland |
| IT | Italy |
| CY | Republic of Cyprus |
| LT | Lithuania |
| LV | Latvia |
| LU | Luxembourg |
| HU | Hungary |
| MT | Malta |
| NL | The Netherlands |
| AT | Austria |
| PL | Poland |
| PT | Portugal |
| RO | Romania |
| SI | Slovenia |
| SK | Slovakia |
| FI | Finland |
| SE | Sweden |
| UK | The United Kingdom |
| HR | Croatia |
| TR | Turkey |
| MK | Former Yugoslav Republic of Macedonia |
| IS | Iceland |
| NO | Norway |
| RS | Republic of Serbia |
| IL | Israel |
| AL | Albania |
| LI | Liechtenstein |
| ME | Montenegro |
| US | United States of America |

## MAIN FINDINGS

This report addresses three core themes: resource efficiency, green markets and green jobs with a particular focus on SMEs[1]. Representatives of companies, both SMEs and large companies as reference group, were interviewed across the EU, a number of other European countries and the US[2]. The following key results emerge regarding SMEs going green in the EU in 2012:

### RESOURCE EFFICIENCY

- 93% of EU SMEs report that they are taking at least one action to be more resource efficient. SMEs are currently most likely to save energy (64%), minimise their waste (62%) and recycle (61%) in order to save resources. Half or more of SMEs also opt for saving materials (57%) and water (50%). In comparison with SMEs, large companies with more than 250 employees are considerably more likely to save energy (82% vs. 64%), minimise waste (72% vs. 62%), recycle (76% vs. 61%), save materials (74% vs. 57%) and sell their scrap material to another company (44% vs. 24%).

- **In the next two years, four SMEs in five (80%) plan to implement additional resource efficiency actions.** However, 79% of the companies that are currently *not* taking any measures do not intend to implement any action in the near future. 91% of large companies plan to take additional actions to promote resource efficiency.

- **A third of SMEs in the EU (33%) make efforts to improve resource efficiency because it is one of their top priorities.** Around a fifth say that they are taking these measures because of financial and fiscal incentives or other forms of public support (23%), in order to create a competitive advantage/business opportunity (23%) or because of demand from customers or providers (22%). Large companies (250+ employees) are considerably more likely than SMEs to mention creation of a competitive advantage/business opportunity (36% vs. 23% for SMEs), anticipation of future professional/product standards (22% vs. 12%) and anticipation of future changes in legislation (20% vs. 12%) as reasons for improving resource efficiency.

- 35% of SMEs in the EU indicate that **measures to improve resource efficiency have reduced the production costs while 27% report that their production costs have increased.** No impact is experienced in 27% of companies. Large companies are considerably more likely than SMEs to report that undertaking resource efficiency actions reduced their production costs (56%).

- **43% of SMEs in the EU report that they receive external support in relation to their environmental actions.** Support from the private sector (24%) is more widespread among SMEs in the EU than public support (9%). 47% of large companies receive external support from private sector and 13% from public sector. The majority of SMEs that receive public support for their environmental actions are satisfied with it (56%).

[1] All graphs presented in this report are based on SMEs' answers only.
[2] Full technical details can be found annexed to the end of the report.

- Regarding more specific actions linked to resource efficiency, 25% of SMEs in the EU report they have **an environmental management system** in place in comparison to 48% of large companies.

- One SME in ten in the EU receives **EU support** while such support is much more common among large companies (25%). Structural and cohesion funds rank highest with 4% of SMEs receiving support from them.

- Finally, 11% of SMEs in the EU have bid for **a public procurement tender that included environmental requirements**. Large companies are somewhat more likely to participate in a public procurement tender with environmental requirements than SMEs (16%).

## GREEN MARKETS

- **Just over a quarter (26%) of SMEs in the EU offer green products or services.** A further 8% are planning to do so in the next two years. Nevertheless, the largest segment of SMEs in the EU (60%) does not currently offer green products or services. In comparison to SMEs, a considerably higher proportion of large companies currently offer green products or services (42%).

- **Half (52%) of the SMEs in the EU that currently offer green products or services offer products and services with environmental features**. 29% offer green services or produce green products in the area of recycled materials and 20% in renewable energy or solid waste management. Large companies are significantly more likely to offer environmentally-related professional services than SMEs (31% vs. 14%).

- Food and beverages (25%) and electronic and mechanical machinery and equipment (23%) are the most commonly sold green products and services among SMEs.

- SMEs which offer green products and services are most likely to report that their **green sales represent 1-5% of their annual turnover (30%).** For 17% of SMEs, green products or services represent more than 75% of their annual turnover. Large companies are more likely to report that these green products or services represent 6-10% of their annual turnover (24% vs. 15% for SMEs).

- **Three in five SMEs have been selling green products or services for more than three years (61%).** 29% report that they have been selling green products and services between one and three years and 8% of SMEs in the EU have been selling green products and services for the last 12 months. SMEs are more likely to have been selling green products or services for more than three years than large companies (61% vs. 55%) while large companies (42%) are considerably more likely than SMEs (29%) to report they have been selling green products and services for one to three years.

- **87% of SMEs in the EU that sell green products or services do so on the national markets**. In second place, just under a quarter of SMEs report that they operate in the European Union. Very few companies offer their catalogue of green products or services to countries outside the EU. Large companies are considerably more likely to sell green products or services in several geographical areas than SMEs.

- **Customer demand plays a major role in the decision to sell green products or services.** The main reason for SMEs in the EU to sell green products or services is demand from customers (48%). Companies’ core values (32%) and image (30%) also play a role in this respect. Correspondingly, the main reasons for *not* offering green products or services listed by SMEs in the EU are that it does not fit or is not important for the SMEs image (24%), insufficient demand from customers (23%), and the fact that it is not important to the company's core values (20%). Large companies are considerably more likely to mention company's image (51% vs. 30%) and creation of a competitive advantage/business opportunity (43% vs. 27%) as reasons for selling green products or services than SMEs.

- **Relatively few SMEs receive external support for offering green products and services**: 30% report that they receive external support. For 26% of companies this support comes from the private sector while 8% receive assistance from public sector. Large companies are considerably more likely than SMEs (to receive external support for the production of its green products or services (44% vs. 30%).

- **Financial incentives are considered the best way to expand SMEs range of green products or services.** Half (49%) of the SMEs that already offer green products or services indicate that financial incentives for developing products, services or new production processes would be the best way to help the expansion of their range of green products or services. Large companies that are already offering green services or products are considerably more likely than SMEs that are currently offering green services or products to indicate that none of the types of support would help them to expand their range of green products or services (24% vs. 12% for SMEs) are more likely to be mentioned among SMEs.

- Furthermore, 31% of the SMEs that are *not* currently offering green products or services cite financial incentives as the best way to help launch a range of green products or services. 43% of large companies cite financial incentives as such type of support.

## GREEN JOBS

- **37% of SMEs in the EU have employees, which may include the owner himself, working in green jobs some or all the time**.

  **Slight increase can be seen in the number of SMEs offering green jobs**. The estimates of EU SMEs suggest that the proportion of companies with green jobs will increase in the next two years. The expected proportion of companies having at least one employee who work in green jobs is 39% in comparison to the current proportion of 37%.

## INTRODUCTION: ATTITUDES TOWARDS THE ENVIRONMENT

There are 20,8 million small and medium-sized enterprises (SMEs)[3] in the European Union, representing 99% of all businesses and providing around 90 million jobs in the internal market[4]. SMEs are the backbone of the European economy and their contribution is essential for pursuing the goals of 'Europe 2020', the strategy for smart, sustainable and inclusive growth[5].

The Commission promotes the growth of SMEs through the Small Business Act for Europe[6]. This framework includes an initiative to raise SMEs' awareness of environmental and energy-related issues and to assist them in implementing legislation, assessing their environmental and energy performance and upgrading their skills and qualifications.

In October 2010, a report on SMEs and the environment in the EU was published[7]. The report estimates the environmental impact of SMEs in Europe and includes the following conclusions:

- Up to 24% of SMEs actively engage in actions to reduce their environmental impact (mainly the reduction of energy consumption);
- SMEs find it more difficult to comply with environmental legislation than large companies
- Certified environmental management systems (EMS) are more attractive solutions for medium-sized and large enterprises and for companies with a high impact on the environment. EMS are too complicated for micro or small companies. Systems should be tailor-made for different types of SMEs.
- Lack of expertise, lengthy approval procedures for new products and lack of consumer demand are the main obstacles that prevent SMEs from entering the green markets.

The report was based mainly on secondary data collected from various data bases and on a limited number of online interviews carried out among representatives of SMEs across the EU. In order to get a full view from the perspective of SMEs, an extensive survey was carried out by telephone interviews of nearly 11,000 companies in the EU and nearly 2,000 more in a number of non-EU countries, namely the acceding and candidate countries to the EU, other European countries, and the US.

This current report presents the results of the survey focusing on SMEs, detailing the findings at EU level, across the country groupings, in individual Member States and in terms of the profile of the companies. It serves as a benchmark for the state of green economy in companies with the objective of repeating the study every two years so as to track developments in the coming years. Full technical details of the survey can be found annexed to the report.

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[3] 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. Full definition can be found in: *http://ec.europa.eu/enterprise/policies/sme/facts-figures-analysis/sme-definition/index_en.htm*

[4] http://ec.europa.eu/enterprise/policies/sme/facts-figures-analysis/index_en.htm

[5] http://ec.europa.eu/enterprise/policies/europe2020/index_en.htm

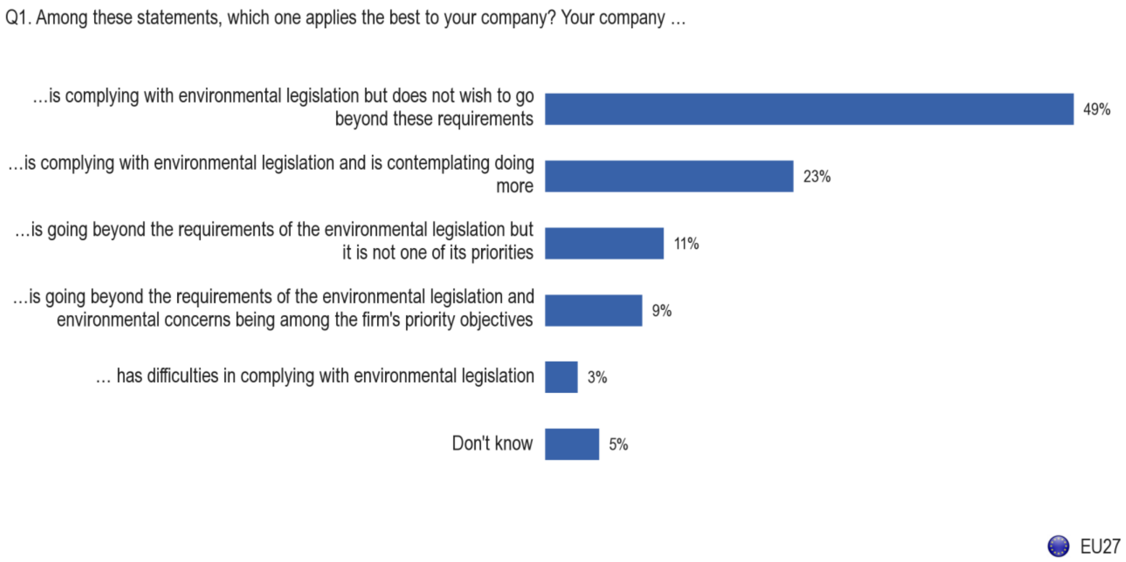
[6] http://ec.europa.eu/enterprise/policies/sme/small-business-act/index_en.htm

[7] http://ec.europa.eu/enterprise/policies/sme/business-environment/files/main_report_en.pdf

### *i) Becoming green: Why (not)?*

In this first section, we establish the context of the green economy in the EU: what is the perceived state of environmental compliance in SMEs and what deters them from pursuing environmental goals even further.

***- Half of the SMEs in the EU report that they comply with environmental legislation -***




**SMEs in the EU appear to be largely 'green' in terms of compliance with environmental legislation.** Based on self-reported results, 92% of SMEs comply with environmental legislation, putting various degrees of extra effort into tackling environmental challenges:

- 49% of companies do not intend to go beyond the obligatory measures;
- 20% are currently going beyond the requirements, regardless of whether this is a company priority or not;
- 23% are contemplating doing more in the future.

It is significant that only 3% of companies in the EU admit they have difficulties in complying with environmental legislation, which indicates that adapting to legislation might not be the main obstacle to the progress of the green economy in SMEs.

An analysis by groups of countries shows that SMEs in the Member States that joined the EU more recently are more likely than SMEs in EU15 countries to say that they comply with the legislation but do not wish to go any further (54% vs. 48). US results suggest that there is less awareness of compliance with environmental regulations than in the EU, as 13% answer 'don't know/not applicable'. This figure stands at 5% in the EU.

SMEs are considerably more likely than large companies with over 250 employees to report they comply with environmental legislation but do not wish to go beyond these requirements (49% vs. 24% for large companies). Conversely, large companies significantly more frequently indicate that they go beyond the requirements whether or not environmental concerns are among the priority objectives of the company (51% vs. 20% for SMEs). Not a single large company admits that they have difficulties in complying with environmental legislation in comparison to 3% of SMEs reporting such difficulties.

Secondly, the results also vary according to the profile of companies. **The likelihood that a company does more than required - or at least has the intention of doing so - increases with the size of the company**. Micro enterprises (<10 employees) are more likely than larger enterprises to say that they comply with legislation but do not wish to go beyond it. The sector of activity and the type of end-client do not seem to have much impact in this respect but the economic situation does appear to have influenced the actions of SMEs. **SMEs that report falling turnover in the last two years are less likely to take additional measures that go beyond environmental legislation.**

Q1 Among these statements, which one applies the best to your company? Your company ...

| | ...is complying with environmental legislation but does not wish to go beyond these requirements | ...is complying with environmental legislation and is contemplating doing more | ...is going beyond the requirements of the environmental legislation but it is not one of its priorities | ...is going beyond the requirements of the environmental legislation and environmental concerns being among the firm's priority objectives | ... has difficulties in complying with environmental legislation |
|---|---|---|---|---|---|
| EU27 | 49% | 23% | 11% | 9% | 3% |
| **Company size** | | | | | |
| 01-09 | 51% | 23% | 10% | 7% | 3% |
| 10-49 | 43% | 26% | 13% | 12% | 4% |
| 50-249 | 28% | 29% | 14% | 25% | 1% |
| **Company's turnover (past 2 years)** | | | | | |
| Increased | 44% | 26% | 12% | 10% | 3% |
| Decreased | 53% | 21% | 9% | 8% | 4% |
| Remained unchanged | 49% | 25% | 11% | 9% | 2% |

At national level, considerable variations can be observed. The main results are as follows:

- Very few SMEs in the EU report that they have difficulties complying with the environmental legislation. The highest figure of SMEs facing difficulties is recorded in France (7%) and Latvia (6%). The highest proportion of all countries surveyed is observed in Turkey (8%).

- SMEs in Germany (39%) and the Netherlands (31%) are the most likely to say that they go beyond the required measures – whether or not this is a priority of the company. 13% in both countries also say environmental concerns are a priority.

- A fifth of companies in Malta (20%) report that environmental issues are a priority and that they pursue measures exceeding the requirements of legislation. Outside the EU, similar figures are recorded in FYROM (22%) and Turkey (19%).

- Over two-thirds of companies in Denmark say they comply with the legislation but do not wish to go further (70%), followed by 64% of Spanish and 63% Polish SMEs. This is the most common answer in all countries but six. In Cyprus (48%), Luxembourg (42%), Slovenia (41%), Finland (36%) as well as in Turkey (47%) the largest segment of the poll claim they are contemplating doing more. In Romania, the poll is equally divided between SMEs that report they are complying with the legislation but do not wish to go beyond the requirements and SMEs that are contemplating doing more (36% each).

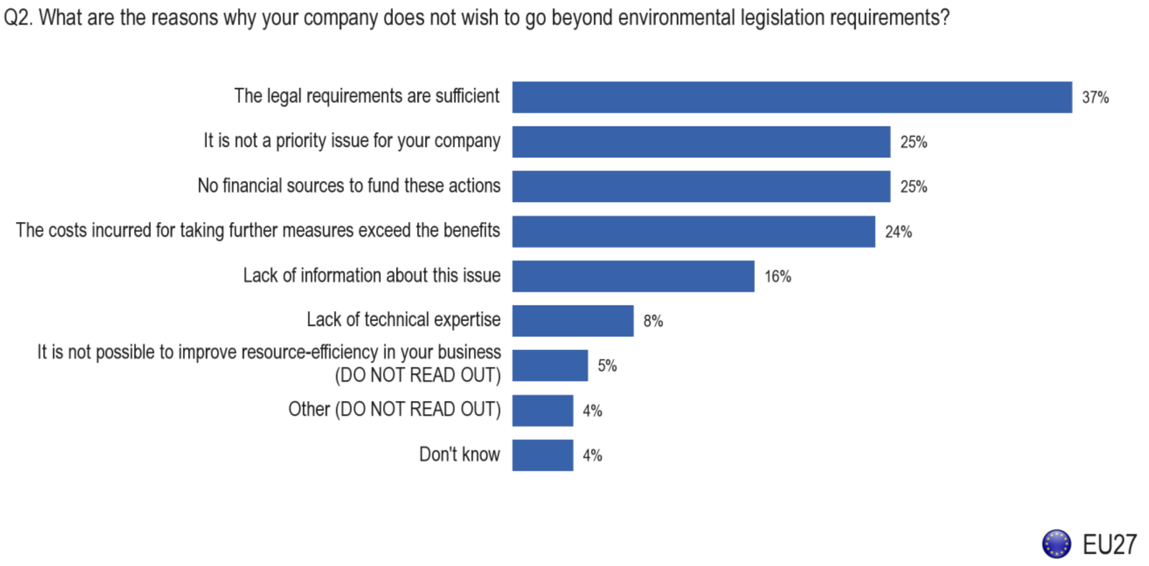
**Q1 Among these statements, which one applies the best to your company? Your company ...**

| | ...is complying with environmental legislation but does not wish to go beyond these requirements | ...is complying with environmental legislation and is contemplating doing more | ...is going beyond the requirements of the environmental legislation but it is not one of its priorities | ...is going beyond the requirements of the environmental legislation and environmental concerns being among the firm's priority objectives | ... has difficulties in complying with environmental legislation | Don't know |
|---|---|---|---|---|---|---|
| EU27 | 49% | 23% | 11% | 9% | 3% | 5% |
| BE | **49%** | 25% | 9% | 9% | *2%* | 6% |
| BG | **53%** | 18% | 10% | 7% | *3%* | 9% |
| CZ | **56%** | 20% | 13% | 8% | *0%* | 3% |
| DK | **70%** | 18% | 2% | 6% | *1%* | 3% |
| DE | **35%** | 23% | 26% | 13% | *1%* | 2% |
| EE | **56%** | 8% | 6% | 11% | *0%* | 19% |
| IE | **53%** | 27% | 5% | 9% | *2%* | 4% |
| EL | **50%** | 20% | 6% | 17% | *2%* | 5% |
| ES | **64%** | 17% | *3%* | 10% | *3%* | 3% |
| FR | **48%** | 28% | 5% | *4%* | 7% | 8% |
| IT | **42%** | 23% | 18% | 9% | *4%* | 4% |
| CY | 20% | **48%** | 7% | 15% | *4%* | 6% |
| LV | **42%** | 25% | *5%* | 8% | 6% | 14% |
| LT | **49%** | 20% | 11% | 8% | *4%* | 8% |
| LU | 37% | **42%** | 11% | 4% | *1%* | 5% |
| HU | **59%** | 24% | 5% | 6% | *4%* | 2% |
| MT | **36%** | 33% | 7% | 20% | *3%* | 1% |
| NL | **45%** | 16% | 18% | 13% | *3%* | 5% |
| AT | **36%** | 27% | 17% | 11% | *1%* | 8% |
| PL | **63%** | 22% | 4% | *3%* | *3%* | 5% |
| PT | **40%** | 30% | 9% | 11% | *3%* | 7% |
| RO | **36%** | **36%** | 11% | 6% | *5%* | 6% |
| SI | 33% | **41%** | 8% | 11% | *2%* | 5% |
| SK | **49%** | 23% | 12% | 10% | *1%* | 5% |
| FI | 32% | **36%** | 15% | 13% | *1%* | 3% |
| SE | **44%** | 25% | 7% | 12% | *2%* | 10% |
| UK | **53%** | 22% | 6% | 10% | *2%* | 7% |
| HR | 44% | 39% | 6% | 8% | 1% | 2% |
| TR | 13% | 47% | 4% | 19% | 8% | 9% |
| MK | 39% | 23% | 6% | 22% | 3% | 7% |
| IS | 43% | 21% | 9% | 8% | 0% | 19% |
| ME | 67% | 24% | 5% | 3% | 1% | 0% |
| NO | 43% | 28% | 10% | 15% | 1% | 3% |
| RS | 63% | 25% | 8% | 2% | 2% | 0% |
| AL | 64% | 18% | 4% | 0% | 6% | 8% |
| LI | 35% | 30% | 12% | 14% | 1% | 8% |
| IL | 33% | 30% | 5% | 13% | 4% | 15% |
| US | 41% | 22% | 10% | 10% | 4% | 13% |

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

Highest percentage per item | Lowest percentage per item

***- Sufficient legislation and financial limitations are the main reasons for not exceeding the requirements -***




Base: SMEs answered 'not wish to go beyond' in Q1

A follow-up question regarding the reasons why SMEs do not want to go beyond the environmental legislation was asked to those companies indicating that they comply with the legislation but do not wish to go further.

**The main reason for not taking measures exceeding the requirements is that** SMEs **consider the current legislation to be sufficient (37%).** Around a quarter cites one of the following reasons: the lack of financial resources for funding such measures (25%), it is not a priority issue for the company (25%) and the costs of such measures exceed the benefits (24%). A lack of information does not seem to play a central role (16%).

SMEs in the Member States that joined the EU before 2004 are considerably more likely than those in the NMS12 to say that the current legislation is sufficient (40% vs. 26%) and that the costs exceed the benefits (26% vs. 19%). Conversely, lack of access to financial resources is cited more often in the NMS12 countries (28%) than in the EU15 countries (24%).

When the European pattern is compared to that of the US, a different picture emerges. In the US, SMEs are significantly more likely to cite lack of technical expertise (17% vs. 8% in the EU27) and the impossibility of improving resource efficiency in their business (19% vs. 5%) as the reasons for not taking measures that go beyond the environmental legislation. American companies (12%) are also more likely to answer 'don't know' than European companies (4%).

An analysis of the profile of the companies reveals differences between SMEs and large companies[8] and in terms of the sector of activity:

- Large companies with more than 250 employees are significantly more likely to consider the current legal obligations sufficient (53% vs. 37% for SMEs). Lack of financial resources also limits the intention of large companies to exceed the legal requirements (34% vs. 25% for SMEs).

[8] Please note that the base for large companies at EU level is low for this question

- Among SMEs, results are relatively homogenous across size categories. Larger SMEs are, however, more likely to indicate that the costs of additional measures are higher than benefits (36% vs. 23% for micro companies) and that going beyond the legislation is not among their priorities (31% vs. 24%).

- When it comes to the sector of activity, industrial SMEs are more likely to consider the current legislation sufficient and to regard the cost-benefit ratio in negative terms than SMEs in other sectors. Furthermore, SMEs in manufacturing are more likely than SMEs in other sectors to cite a lack of financial resources as a reason for not going beyond the current environmental legislation.

Q2 What are the reasons why your company does not wish to go beyond environmental legislation requirements?

| | The legal requirements are sufficient | It is not a priority issue for your company | No financial sources to fund these actions | The costs incurred for taking further measures exceed the benefits | Lack of information about this issue | Lack of technical expertise | It is not possible to improve resource-efficiency in your business (DO NOT READ OUT) | Other (DO NOT READ OUT) | DK/NA |
|---|---|---|---|---|---|---|---|---|---|
| EU27 | 37% | 25% | 25% | 24% | 16% | 8% | 5% | 4% | 4% |
| **Company size** | | | | | | | | | |
| 01-09 | 37% | 24% | 25% | 23% | 16% | 8% | 6% | 5% | 4% |
| 10-49 | 40% | 29% | 27% | 30% | 14% | 8% | 5% | 4% | 4% |
| 50-249 | 34% | 31% | 22% | 36% | 15% | 5% | 4% | 5% | 3% |
| **Sectors grouped (NACE)** | | | | | | | | | |
| Manufacturing (C) | 37% | 26% | 31% | 26% | 12% | 6% | 4% | 6% | 3% |
| Retail (G) | 35% | 23% | 28% | 26% | 17% | 10% | 5% | 5% | 3% |
| Services (I/J/K/H/L/M) | 36% | 30% | 20% | 19% | 15% | 7% | 6% | 4% | 6% |
| Industry (B/D/E/F) | 43% | 18% | 25% | 30% | 16% | 9% | 6% | 4% | 3% |

A country-by-country analysis reveals the following:

- In 13 EU Member States, the largest segment of SMEs considers **the current legislation sufficient**. This is particularly the case in Denmark (56%), Portugal (54%) and Italy (51%). The highest figure overall is registered in Montenegro (89%).

- In seven Member States, most SMEs say that going beyond environmental legislation is **not a priority**, with highest figures observed in Romania (41%) and Slovakia (39%). The highest figures for this response are recorded, outside the EU, in Liechtenstein (49%) and Albania (42%).

- SMEs in Greece (38%), Hungary (38%), the Czech Republic (34%), Slovakia (33%) and Bulgaria (32%) are the most likely to say that a **lack of financial resources** to fund environmental actions is the reason for not exceeding the legislation.

- Finally, **the costs are seen to outweigh the benefits** by SMEs in Malta (41%) and Ireland (26%). This is also the most common answer in the US (30%).

- SMEs in Cyprus are most likely to answer that they do not know (28%).

Q2 What are the reasons why your company does not wish to go beyond environmental legislation requirements?

| | The legal requirements are sufficient | It is not a priority issue for your company | No financial sources to fund these actions | The costs incurred for taking further measures exceed the benefits | Lack of information about this issue | Lack of technical expertise | It is not possible to improve resource-efficiency in your business (DO NOT READ OUT) | Other (DO NOT READ OUT) | Don't know |
|---|---|---|---|---|---|---|---|---|---|
| EU27 | 37% | 25% | 25% | 24% | 16% | 8% | 5% | 4% | 4% |
| BE | **47%** | *14%* | 23% | 22% | *14%* | 15% | 16% | 2% | 3% |
| BG | 24% | 17% | **32%** | 11% | 15% | *2%* | 2% | 11% | 7% |
| CZ | 26% | 23% | **34%** | 23% | 12% | *9%* | 6% | 3% | 7% |
| DK | **56%** | 18% | 13% | 17% | 7% | *4%* | 7% | 8% | 4% |
| DE | **39%** | 33% | 20% | 15% | 10% | *9%* | 2% | 3% | 3% |
| EE | **47%** | 16% | 4% | 7% | 4% | *1%* | 18% | 5% | 10% |
| IE | 22% | 17% | 20% | **26%** | 7% | *5%* | 6% | 5% | 8% |
| EL | 14% | 29% | **38%** | 25% | 13% | *7%* | 3% | 9% | 5% |
| ES | **36%** | 24% | 30% | 27% | 21% | *8%* | 6% | 3% | 2% |
| FR | **40%** | 17% | 31% | 38% | 29% | *15%* | 7% | 6% | 0% |
| IT | **51%** | 27% | 13% | 17% | 5% | *2%* | 5% | 3% | 2% |
| CY | 2% | *1%* | 12% | **20%** | 10% | 4% | 4% | 23% | 28% |
| LV | 28% | **30%** | 28% | 21% | 12% | *5%* | 11% | 6% | 2% |
| LT | 25% | **33%** | 20% | 10% | 7% | *2%* | 10% | 12% | 3% |
| LU | 13% | **30%** | 22% | 17% | 15% | *4%* | 25% | 0% | 0% |
| HU | 29% | 31% | **38%** | 12% | *5%* | 7% | 4% | 5% | 1% |
| MT | 23% | 13% | 22% | **41%** | 1% | *0%* | 14% | 4% | 0% |
| NL | **43%** | 28% | 26% | 32% | 2% | *0%* | 11% | 3% | 4% |
| AT | **36%** | 28% | 11% | 16% | 6% | *0%* | 7% | 9% | 11% |
| PL | **27%** | 24% | 24% | 20% | 20% | *15%* | 0% | 3% | 11% |
| PT | **54%** | 27% | 29% | 28% | 18% | *10%* | 2% | 1% | 1% |
| RO | 22% | **41%** | 23% | 25% | *3%* | *3%* | 2% | 4% | 7% |
| SI | 16% | **35%** | 18% | 13% | 13% | *2%* | 16% | 10% | 2% |
| SK | 32% | **39%** | 33% | 28% | 8% | *5%* | 5% | 3% | 7% |
| FI | **49%** | 25% | 13% | 13% | 16% | *3%* | 16% | 5% | 3% |
| SE | 13% | **34%** | *6%* | 28% | 18% | *6%* | 7% | 11% | 5% |
| UK | **42%** | 24% | 30% | 34% | 23% | *8%* | 4% | 4% | 7% |
| HR | 24% | 38% | 33% | 12% | 7% | 10% | 4% | 5% | 5% |
| TR | 27% | 13% | 49% | 43% | 19% | 3% | 1% | 0% | 0% |
| MK | 29% | 15% | 37% | 28% | 13% | 15% | 4% | 1% | 2% |
| IS | 20% | 16% | 13% | 16% | 23% | 5% | 4% | 10% | 16% |
| ME | 89% | 5% | 0% | 6% | 8% | 2% | 0% | 0% | 0% |
| NO | 44% | 17% | 17% | 18% | 14% | 5% | 8% | 10% | 2% |
| RS | 77% | 3% | 3% | 20% | 6% | 0% | 1% | 3% | 3% |
| AL | 35% | 42% | 14% | 13% | 19% | 8% | 0% | 0% | 8% |
| LI | 31% | 49% | 8% | 11% | 4% | 2% | 0% | 4% | 9% |
| IL | 38% | 19% | 18% | 9% | 3% | 5% | 7% | 8% | 7% |
| US | 25% | 21% | 22% | 30% | 13% | 17% | 19% | 5% | 12% |

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

Highest percentage per item Lowest percentage per item

# 1. USING RESOURCES BETTER: WHO, HOW AND HOW MUCH

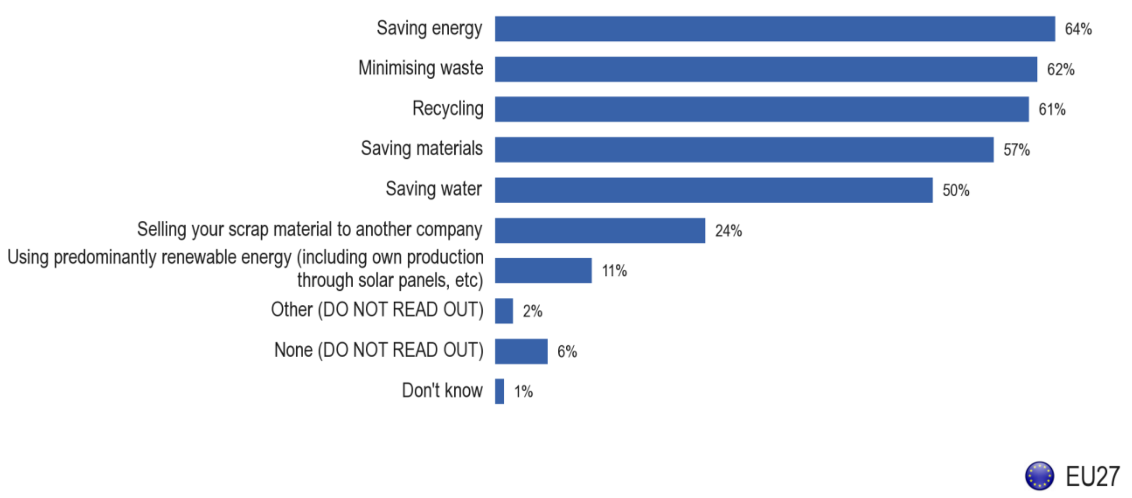
This first part of the report tackles issues linked to the current state of play: what are SMEs doing for the environment, why they are doing it, does it pay off and what is the role played by policies in this context? We will also take a detailed look at environmental management systems and green public procurement.

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

### 1.1.1 What is being done now?

SMEs are currently most likely to save energy (64%), minimise their waste (62%) and recycle (61%) in order to be more resource efficient. Half or more of companies also opt for saving materials (57%) and water (50%).

Q3. What actions is your company undertaking to be more resource efficient?




In comparison to SMEs, large companies with more than 250 employees are considerably more likely to take each of the actions with the exception of saving water: saving energy (82% vs. 64%), minimising waste (72% vs. 62%), recycling (76% vs. 61%), saving materials (74% vs. 57%), and selling their scrap material to another company (44% vs. 24%).

Q3 What actions is your company undertaking to be more resource efficient?

| | Saving energy | Minimising waste | Recycling | Saving materials | Saving water | Selling your scrap material to another company | Using predominantly renewable energy (including own production through solar panels, etc) | Other (DO NOT READ OUT) | None (DO NOT READ OUT) | DK/NA |
|---|---|---|---|---|---|---|---|---|---|---|
| EU27 | 64% | 62% | 61% | 57% | 50% | 24% | 11% | 2% | 6% | 1% |
| **Company size** | | | | | | | | | | |
| 01-09 | 63% | 61% | 61% | 56% | 50% | 22% | 10% | 1% | 7% | 1% |
| 10-49 | 67% | 63% | 63% | 61% | 51% | 32% | 15% | 2% | 4% | 0% |
| 50-249 | 72% | 68% | 66% | 66% | 52% | 46% | 20% | 1% | 2% | 0% |

The types of actions taken by individual countries are as follows:

- In 15 Member States, the most likely action to be taken to improve resource efficiency is **saving energy**. The highest figures are recorded in Portugal (88%), Spain (87%) and the UK (83%).

- SMEs are the most likely to report that they **recycle** in nine Member States led by Spain (93%). High figures are also registered in the UK (91%) and Ireland (83%) as well as in the US (85%).

- The most likely action to be taken in the UK (93%), Italy (72%) and France (63%) is **minimising waste**. SMEs in Norway (76%) and the US (82%) are also more likely than the average SME in the EU to take such a measure. Finnish (80%) and Turkish (76%) SMEs tend to **save materials**.

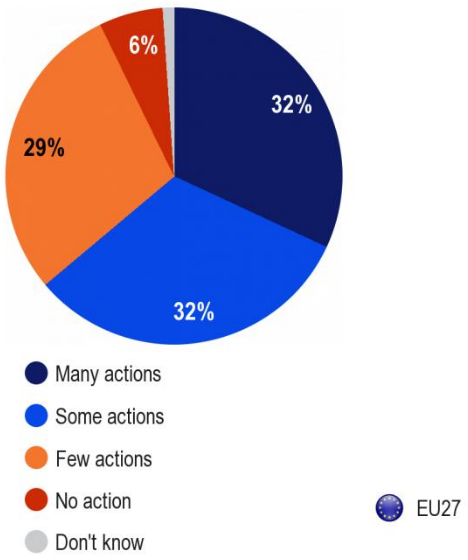
Q3 What actions is your company undertaking to be more resource efficient?

| | Saving energy | Minimising waste | Recycling | Saving materials | Saving water | Selling your scrap material to another company | Using predominantly renewable energy (including own production through solar panels, etc) | Other (DO NOT READ OUT) | None (DO NOT READ OUT) | Don't know |
|---|---|---|---|---|---|---|---|---|---|---|
| EU27 | 64% | 62% | 61% | 57% | 50% | 24% | 11% | 2% | 6% | 1% |
| BE | 47% | 50% | 54% | 36% | 32% | 17% | 16% | 4% | 9% | 1% |
| BG | 47% | 29% | 16% | 32% | 28% | 23% | 6% | 6% | 14% | 1% |
| CZ | 77% | 67% | 62% | 64% | 56% | 26% | 12% | 1% | 7% | 0% |
| DK | 70% | 48% | 42% | 54% | 43% | 34% | 10% | 1% | 13% | 0% |
| DE | 71% | 56% | 57% | 55% | 46% | 26% | 23% | 1% | 7% | 1% |
| EE | 41% | 30% | 33% | 32% | 27% | 13% | 4% | 3% | 26% | 2% |
| IE | 64% | 67% | 83% | 48% | 49% | 25% | 19% | 2% | 2% | 0% |
| EL | 52% | 27% | 65% | 39% | 33% | 27% | 12% | 0% | 16% | 0% |
| ES | 87% | 79% | 93% | 84% | 80% | 36% | 10% | 0% | 1% | 0% |
| FR | 62% | 63% | 62% | 56% | 58% | 21% | 4% | 3% | 5% | 1% |
| IT | 44% | 72% | 53% | 48% | 37% | 14% | 11% | 1% | 6% | 0% |
| CY | 39% | 28% | 74% | 40% | 36% | 12% | 9% | 0% | 15% | 0% |
| LV | 70% | 45% | 13% | 63% | 48% | 24% | 8% | 1% | 14% | 2% |
| LT | 60% | 25% | 15% | 43% | 44% | 17% | 3% | 2% | 19% | 2% |
| LU | 46% | 43% | 67% | 41% | 41% | 13% | 11% | 0% | 7% | 1% |
| HU | 69% | 49% | 21% | 55% | 47% | 20% | 7% | 3% | 5% | 1% |
| MT | 65% | 52% | 74% | 38% | 45% | 20% | 5% | 0% | 6% | 0% |
| NL | 63% | 56% | 46% | 50% | 24% | 24% | 23% | 3% | 7% | 2% |
| AT | 73% | 46% | 52% | 43% | 38% | 14% | 20% | 6% | 6% | 2% |
| PL | 58% | 35% | 37% | 42% | 41% | 24% | 4% | 2% | 8% | 1% |
| PT | 88% | 65% | 80% | 83% | 79% | 33% | 13% | 1% | 0% | 0% |
| RO | 44% | 35% | 35% | 41% | 36% | 15% | 11% | 2% | 20% | 4% |
| SI | 41% | 36% | 34% | 32% | 20% | 22% | 10% | 2% | 14% | 0% |
| SK | 75% | 63% | 47% | 62% | 65% | 27% | 9% | 2% | 4% | 1% |
| FI | 76% | 79% | 80% | 80% | 50% | 36% | 24% | 0% | 3% | 0% |
| SE | 48% | 49% | 64% | 49% | 30% | 19% | 18% | 4% | 7% | 2% |
| UK | 83% | 93% | 91% | 75% | 61% | 37% | 12% | 2% | 1% | 0% |
| HR | 57% | 31% | 33% | 48% | 34% | 26% | 6% | 2% | 10% | 0% |
| TR | 74% | 68% | 47% | 76% | 60% | 42% | 13% | 0% | 7% | 0% |
| MK | 42% | 12% | 20% | 25% | 28% | 6% | 5% | 0% | 26% | 0% |
| IS | 51% | 51% | 65% | 57% | 24% | 22% | 12% | 3% | 6% | 5% |
| ME | 51% | 18% | 19% | 27% | 42% | 11% | 2% | 0% | 35% | 0% |
| NO | 59% | 76% | 67% | 48% | 15% | 29% | 27% | 2% | 4% | 0% |
| RS | 62% | 26% | 20% | 35% | 45% | 20% | 7% | 6% | 8% | 0% |
| AL | 31% | 9% | 13% | 14% | 15% | 7% | 6% | 6% | 33% | 1% |
| LI | 67% | 43% | 61% | 46% | 36% | 20% | 20% | 5% | 4% | 5% |
| IL | 42% | 38% | 40% | 35% | 33% | 23% | 9% | 4% | 12% | 1% |
| US | 74% | 82% | 85% | 71% | 53% | 51% | 15% | 0% | 2% | 1% |

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

Highest percentage per item Lowest percentage per item

Q3. What actions is your company undertaking to be more resource efficient?




When looking at the number of actions, it can be observed that **93% of EU SMEs report they are taking at least one action to become more resource efficient. Around** one third state they are taking many (5-8) actions (32%) and an equal proportion that they are taking some (3-4) actions (32%)[9]. 29% state they take only few actions.

Member States that joined the EU before 2004 are considerably more likely to report that they are taking many (5-8) actions than the more recent Member States (36% vs. 20% for NMS12). This is particularly the case for recycling (67% vs.39%) and minimising waste (67% vs. 43%).

SMEs in the US are considerably more likely to report that they take many (5-8) actions to improve resource efficiency than companies in the EU (57% vs. 32%). This is true for all types of actions, particularly for selling scrap materials to other companies (51% vs. 24%) and recycling (85% vs. 61%).

The likelihood that a company will take many (5-8) actions increases with its size (51% for large companies vs. 32% for SMEs).

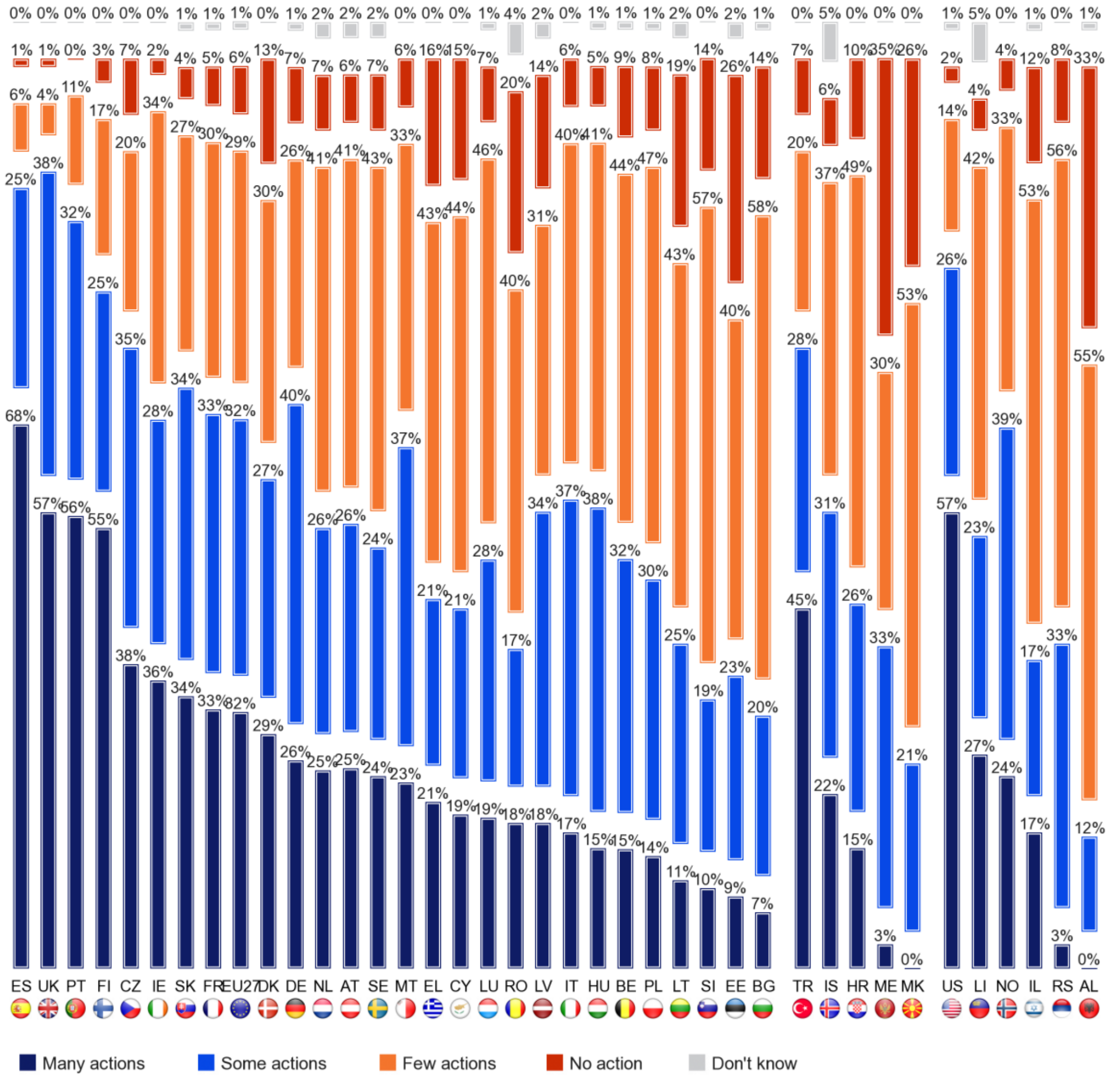
**Q3 What actions is your company undertaking to be more resource efficient?**

| | Many actions | Some actions | Few actions | No action |
|---|---|---|---|---|
| EU27 | 32% | 32% | 29% | 6% |
| **Company size** | | | | |
| 01-09 | 31% | 32% | 30% | 7% |
| 10-49 | 38% | 30% | 28% | 4% |
| 50-249 | 44% | 29% | 25% | 2% |

9 Many actions= 5-8 actions, some actions=3-4 actions, few actions = 1-2 actions

Nationally, there are large differences in the number of actions being currently taken by SMEs. Firstly, no actions are taken in 26% of companies in Estonia, 20% in Romania and 19% in Lithuania. High rates of non-activity are recorded outside the EU in Albania (33%), Montenegro (35%) and FYROM (26%). Conversely, the most active companies are based in Spain (68% taking many actions), the UK (57%), Portugal (56%) and Finland (55%). As well as in the EU countries, large numbers of measures are taken in the US (57%) and Turkey (45%).

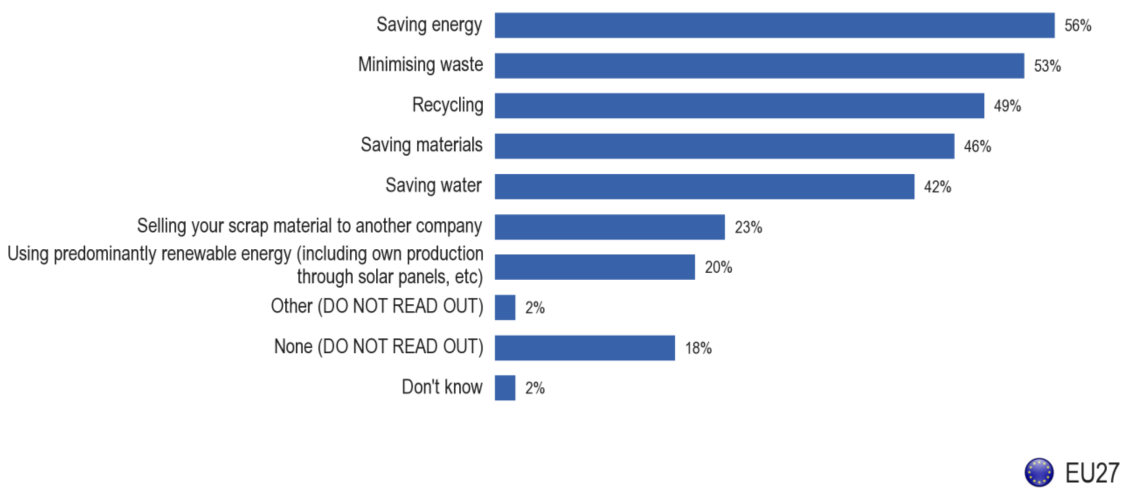
Q3. What actions is your company undertaking to be more resource efficient?



### 1.1.2 What will be done in two years' time?

The actions most likely to be taken by SMEs in the next two years are saving energy (56%) and minimising waste (53%), followed by recycling (49%), saving materials (46%) and saving water (42%). 23% of SMEs intend to sell scrap materials and 20% to use predominantly renewable energy.

Q4. Over the next two years, what are the additional resource efficiency actions that your company is planning to implement?




Large companies are more likely than SMEs to indicate they intend to take most of these actions. This is particularly the case for saving energy and materials (71% vs. 56% for SMEs), selling scrap materials to another company (42% vs. 23%), saving materials (59% vs. 46%) and recycling (60% vs. 49%). Among SMEs, medium-sized companies are more likely to report they intend to take some measures than small and micro companies, particularly when it comes to selling scrap materials, saving energy and using renewable energy.

Q4 Over the next two years, what are the additional resource efficiency actions that your company is planning to implement ?

| | Saving energy | Minimising waste | Recycling | Saving materials | Saving water | Selling your scrap material to another company | Using predominantly renewable energy (including own production through solar panels, etc) | Other (DO NOT READ OUT) | None (DO NOT READ OUT) | DK/NA |
|---|---|---|---|---|---|---|---|---|---|---|
| EU27 | 56% | 53% | 49% | 46% | 42% | 23% | 20% | 2% | 18% | 2% |
| **Company size** | | | | | | | | | | |
| 01-09 | 55% | 52% | 48% | 45% | 42% | 21% | 18% | 2% | 19% | 2% |
| 10-49 | 62% | 56% | 54% | 51% | 46% | 29% | 25% | 2% | 14% | 2% |
| 50-249 | 66% | 56% | 51% | 52% | 41% | 37% | 28% | 4% | 11% | 3% |
| **Sectors grouped (NACE)** | | | | | | | | | | |
| Manufacturing (C) | 61% | 55% | 49% | 50% | 43% | 32% | 21% | 2% | 13% | 1% |
| Retail (G) | 55% | 53% | 50% | 42% | 42% | 22% | 18% | 2% | 19% | 2% |
| Services (I/J/K/H/L/M) | 56% | 51% | 45% | 47% | 42% | 17% | 17% | 3% | 21% | 3% |
| Industry (B/D/E/F) | 55% | 54% | 54% | 51% | 43% | 32% | 27% | 3% | 14% | 2% |

The individual measures that EU SMEs are most likely to take in the next two years is **saving energy**, this action being cited by the largest segment of companies in 19 Member States. The highest scores are recorded in the UK (82%) and Portugal (81%). Saving energy is also the most cited action in Turkey (72%).

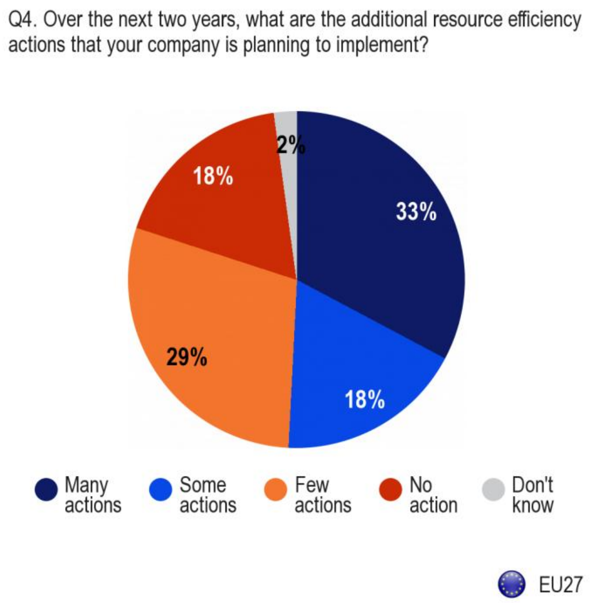
In the second place, SMEs in five EU countries are most likely to implement **recycling** measures. This is particularly the case in the UK (87%) and Spain (81%). This action is also the most cited means of improving resource efficiency in the US (72%). The highest proportion of SMEs in the UK (88%) and Italy (56%) intend to **minimise waste** while Finnish companies opt for **saving materials** (46%).

Q4 Over the next two years, what are the additional resource efficiency actions that your company is planning to implement?

| | Saving energy | Minimising waste | Recycling | Saving materials | Saving water | Selling your scrap material to another company | Using predominantly renewable energy (including own production through solar panels, etc) | Other (DO NOT READ OUT) | None (DO NOT READ OUT) | Don't know |
|---|---|---|---|---|---|---|---|---|---|---|
| EU27 | 56% | 53% | 49% | 46% | 42% | 23% | 20% | 2% | 18% | 2% |
| BE | 44% | 36% | 32% | 30% | 25% | 10% | 27% | 5% | 17% | 2% |
| BG | 44% | 30% | 16% | 32% | 26% | 21% | 11% | 8% | 14% | 5% |
| CZ | 60% | 56% | 51% | 47% | 44% | 20% | 14% | 5% | 22% | 1% |
| DK | 43% | 30% | 28% | 29% | 24% | 16% | 11% | 1% | 43% | 0% |
| DE | 50% | 39% | 34% | 33% | 29% | 16% | 28% | 2% | 29% | 2% |
| EE | 32% | 22% | 22% | 24% | 21% | 9% | 3% | 2% | 29% | 15% |
| IE | 42% | 38% | 50% | 28% | 33% | 17% | 22% | 5% | 25% | 4% |
| EL | 50% | 25% | 55% | 35% | 30% | 30% | 27% | 2% | 16% | 3% |
| ES | 79% | 71% | 81% | 77% | 73% | 37% | 17% | 1% | 11% | 3% |
| FR | 61% | 58% | 50% | 43% | 47% | 24% | 18% | 1% | 14% | 2% |
| IT | 40% | 56% | 39% | 33% | 30% | 12% | 17% | 1% | 22% | 2% |
| CY | 34% | 26% | 62% | 41% | 37% | 14% | 17% | 2% | 23% | 0% |
| LV | 66% | 45% | 14% | 65% | 52% | 24% | 15% | 1% | 15% | 4% |
| LT | 49% | 22% | 14% | 34% | 33% | 17% | 8% | 3% | 29% | 6% |
| LU | 33% | 20% | 31% | 22% | 25% | 13% | 22% | 1% | 25% | 8% |
| HU | 51% | 43% | 19% | 43% | 36% | 14% | 12% | 2% | 22% | 5% |
| MT | 24% | 21% | 34% | 18% | 12% | 11% | 24% | 2% | 25% | 11% |
| NL | 48% | 43% | 29% | 42% | 21% | 14% | 26% | 3% | 21% | 4% |
| AT | 36% | 24% | 20% | 20% | 23% | 6% | 23% | 11% | 31% | 3% |
| PL | 52% | 38% | 33% | 43% | 38% | 30% | 14% | 1% | 12% | 2% |
| PT | 81% | 72% | 74% | 74% | 79% | 40% | 26% | 2% | 6% | 3% |
| RO | 54% | 41% | 43% | 43% | 43% | 22% | 20% | 1% | 12% | 3% |
| SI | 30% | 21% | 23% | 24% | 16% | 14% | 16% | 6% | 34% | 0% |
| SK | 62% | 50% | 42% | 54% | 54% | 25% | 18% | 1% | 16% | 3% |
| FI | 45% | 41% | 44% | 46% | 29% | 24% | 23% | 2% | 30% | 2% |
| SE | 35% | 29% | 32% | 23% | 17% | 12% | 17% | 9% | 32% | 2% |
| UK | 82% | 88% | 87% | 77% | 63% | 43% | 27% | 3% | 6% | 1% |
| HR | 43% | 28% | 22% | 35% | 30% | 16% | 19% | 3% | 23% | 0% |
| TR | 72% | 65% | 48% | 68% | 66% | 41% | 34% | 0% | 7% | 1% |
| MK | 41% | 15% | 21% | 19% | 24% | 5% | 11% | 1% | 32% | 2% |
| IS | 47% | 48% | 50% | 45% | 29% | 22% | 23% | 0% | 21% | 8% |
| ME | 44% | 16% | 29% | 23% | 36% | 13% | 12% | 3% | 36% | 2% |
| NO | 30% | 31% | 30% | 22% | 10% | 13% | 15% | 7% | 44% | 4% |
| RS | 36% | 8% | 23% | 14% | 26% | 8% | 4% | 6% | 31% | 5% |
| AL | 27% | 9% | 17% | 15% | 10% | 6% | 1% | 3% | 41% | 3% |
| LI | 32% | 11% | 19% | 18% | 15% | 8% | 20% | 11% | 37% | 8% |
| IL | 37% | 27% | 33% | 33% | 22% | 22% | 9% | 4% | 14% | 3% |
| US | 69% | 68% | 72% | 69% | 52% | 51% | 31% | 1% | 15% | 2% |

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

Highest percentage per item Lowest percentage per item




Regarding the number of additional resource efficiency actions, **over the next two years, four in five SMEs (80%) intend to implement additional measures to promote resource efficiency.** A third intend to take many (5-8) actions (33%), followed by 18% who propose to implement some actions and 29% a few actions.

The first important finding here is that 79% of those SMEs that are currently not taking any actions do not intend to do so in the coming two years. Conversely those SMEs that are already taking many actions are also the most inclined to do more in the near future (72%).

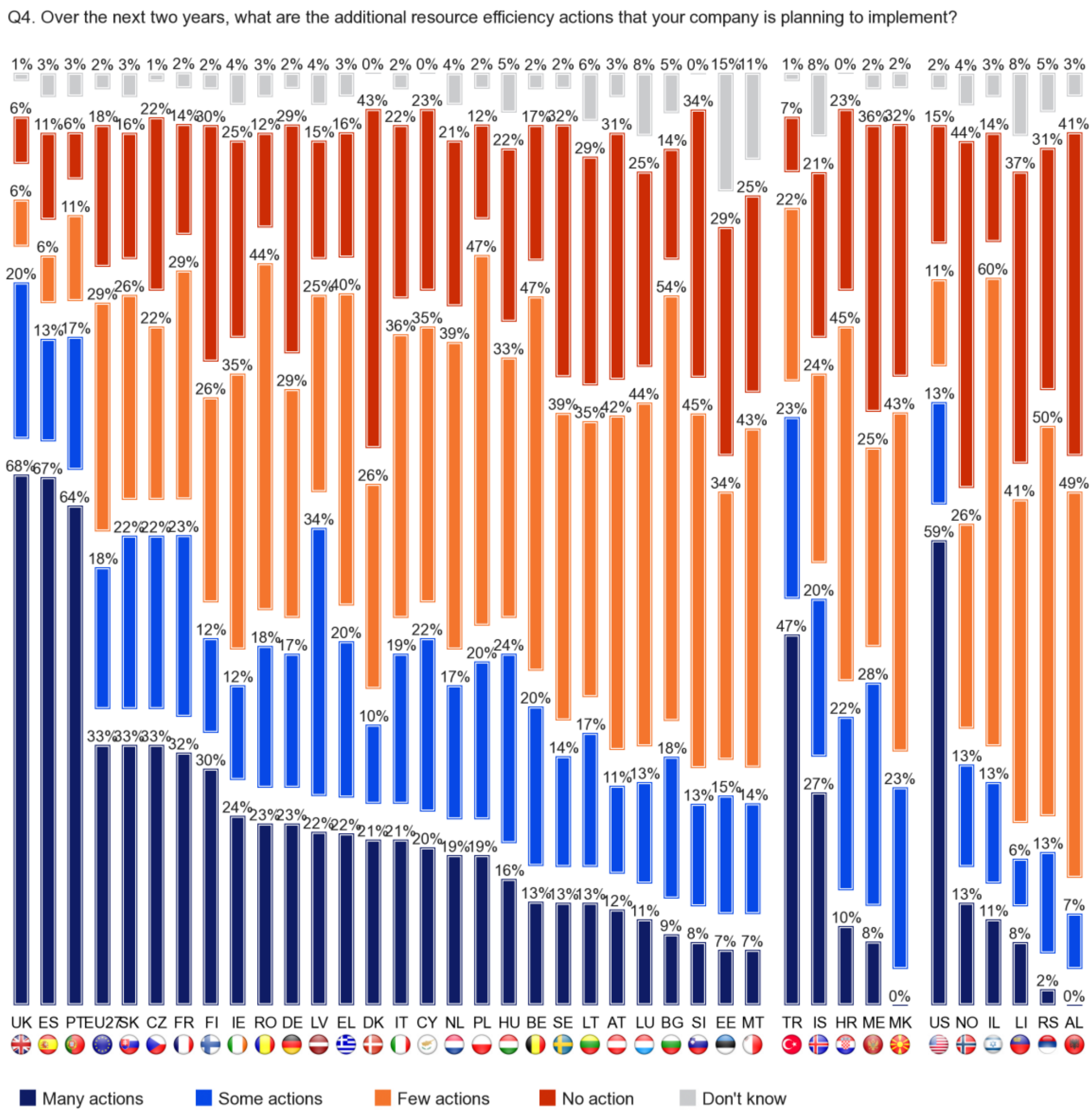
Furthermore, the larger a company is in terms of number of employees, the more likely it is to say that it intends to implement many actions (41% for large companies in comparison to 33% for SMEs) while micro companies are the most likely to state they will not introduce any measures to improve resource efficiency (19%).

**Q4 Over the next two years, what are the additional resource efficiency actions that your company is planning to implement ?**

| | Many actions | Some actions | Few actions | No action |
|---|---|---|---|---|
| EU27 | 33% | 18% | 29% | 18% |
| **Company size** | | | | |
| 01-09 | 31% | 18% | 29% | 19% |
| 10-49 | 39% | 19% | 26% | 14% |
| 50-249 | 40% | 18% | 28% | 11% |
| **Sectors grouped (NACE)** | | | | |
| Manufacturing (C) | 36% | 19% | 31% | 13% |
| Retail (G) | 30% | 21% | 28% | 19% |
| Services (I/J/K/H/L/M) | 32% | 17% | 27% | 21% |
| Industry (B/D/E/F) | 38% | 15% | 31% | 14% |

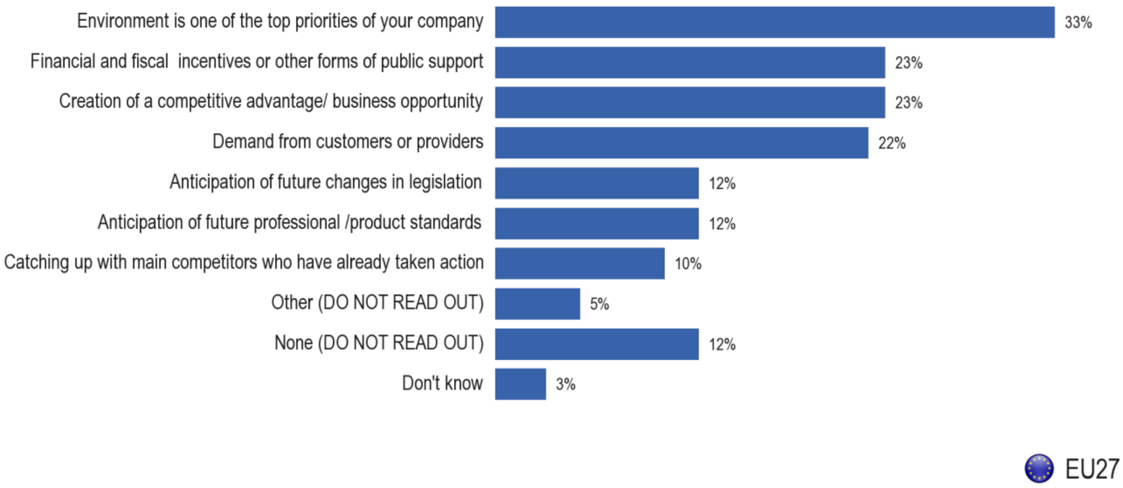
In line with the results for the current situation, EU15 SMEs are considerably more likely than NMS12 companies to consider taking many (5-8) actions in the coming two years (36% vs. 21%). Similarly, SMEs in the US are more likely to intend to take many measures than companies in the EU27 (59% vs.33%).

At national level, in those countries where SMEs are already taking many measures to improve resource efficiency, they are also more likely to indicate that they plan to take several more such actions in the next two years. This is particularly the case in the UK (68%), Spain (67%) and Portugal (64%) as well as in the US (59%). In turn, SMEs in Denmark (43%) Slovenia (34%), Sweden (32%), Austria (31%) and Finland (30%) say that they do not intend to take any further measures in the coming years. Outside the EU, the highest figures are observed in Norway (44%) and Albania (41%).



### 1.1.3 Why are SMEs taking actions?

Q5. What are the main reasons why your company is taking actions to be more resource efficient?




Base: SMEs answered 'at least one action to be more resource efficient' in Q3

**A third of EU SMEs (33%) are making efforts to improve resource efficiency because it is one of their top priorities.** Around a fifth mention financial and fiscal incentives or other forms of public support (23%), creation of a competitive advantage/business opportunity (23%) and demand from customers or providers (22%). Anticipating future requirements in terms of legislation (12%) or professional/product standards (12%) are less likely reasons for improving resource efficiency.

Some differences emerge between Europe and the US. SMEs in the US are much more likely to mention financial and fiscal incentives (44% vs. 23% in the EU27) as a reason for taking measures to promote resource efficiency, while European SMEs cite demand from customers/providers (22% vs. 9% in the US).

In terms of company profiles, large companies (250+ employees) are considerably more likely than SMEs to mention creation of a competitive advantage/ business opportunity (36% vs. 23% for SMEs), anticipation of future professional /product standards (22% vs. 12%) and anticipation of future changes in legislation (20% vs. 12%) as reasons for improving resource efficiency. Medium-sized companies (50-249 employees) are the most likely to cite demand from customers/providers, the creation of competitive advantage and the fact that the environment is a top priority as reasons for taking actions to be more resource efficient.

Q5 What are the main reasons why your company is taking actions to be more resource efficient?

| | Environment is one of the top priorities of your company | Financial and fiscal incentives or other forms of public support | Creation of a competitive advantage/ business opportunity | Demand from customers or providers | Anticipation of future changes in legislation | Anticipation of future professional /product standards | Catching up with main competitors who have already taken action | Other (DO NOT READ OUT) | None (DO NOT READ OUT) | DK/NA |
|---|---|---|---|---|---|---|---|---|---|---|
| EU27 | 33% | 23% | 23% | 22% | 12% | 12% | 10% | 5% | 12% | 3% |
| **Company size** | | | | | | | | | | |
| 01-09 | 34% | 22% | 22% | 21% | 12% | 10% | 10% | 5% | 12% | 3% |
| 10-49 | 31% | 27% | 24% | 23% | 14% | 16% | 13% | 5% | 11% | 2% |
| 50-249 | 39% | 25% | 39% | 33% | 17% | 16% | 11% | 9% | 5% | 3% |

Nationally, the most frequently cited reason for taking actions to improve resource efficiency is that the **environment is one of the company's top priorities.** This is the first answer in 18 Member States, with the highest figures recorded in Malta (63%), Cyprus (57%) and Slovenia (55%). Over half of SMEs in Croatia also mention this reason (51%).

In five Member States the largest segment of SMEs states that **financial and fiscal incentives** are among the main reasons for taking actions to be more resource efficient. This is particularly the case in the Netherlands (45%) and Ireland (40%). **Demand from customers/providers** is the most cited reason in Finland (43%), Hungary (26%), along with financial and fiscal incentives, and Romania (26%). It is also the key driver encouraging Turkish companies to take actions toward better resource efficiency (50%).

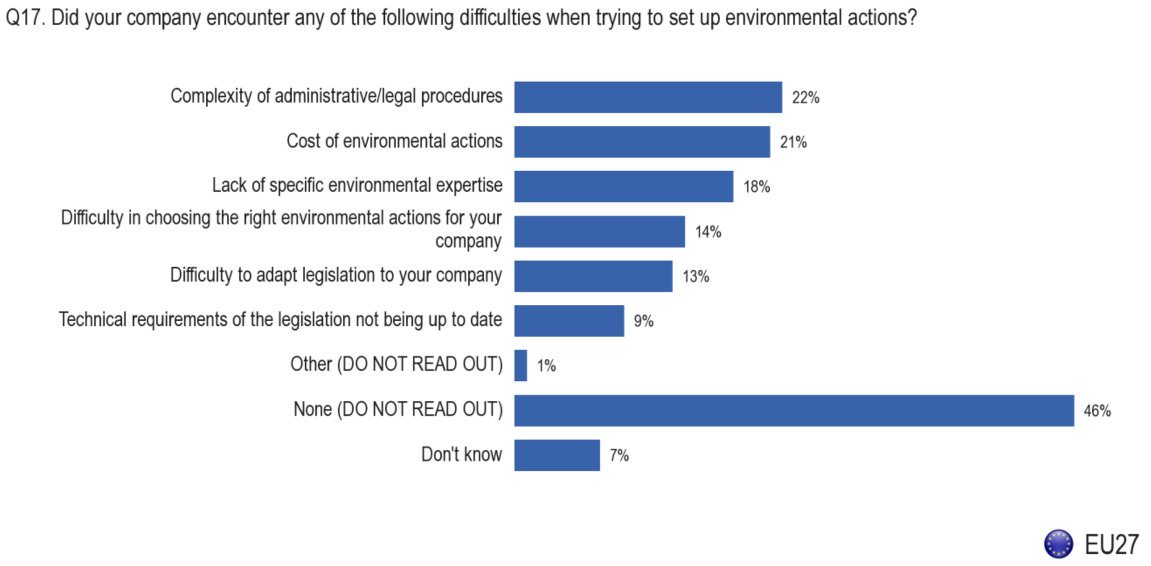
Q5 What are the main reasons why your company is taking actions to be more resource efficient?

| | Environment is one of the top priorities of your company | Financial and fiscal incentives or other forms of public support | Creation of a competitive advantage/ business opportunity | Demand from customers or providers | Anticipation of future changes in legislation | Anticipation of future professional /product standards | Catching up with main competitors who have already taken action | Other (DO NOT READ OUT) | None (DO NOT READ OUT) | Don't know |
|---|---|---|---|---|---|---|---|---|---|---|
| EU27 | 33% | 23% | 23% | 22% | 12% | 12% | 10% | 5% | 12% | 3% |
| BE | 26% | 21% | 21% | 18% | 19% | 19% | 8% | 6% | 13% | 4% |
| BG | 22% | 16% | 21% | 9% | 15% | 8% | 8% | 11% | 7% | 6% |
| CZ | 43% | 17% | 14% | 24% | 13% | 6% | 8% | 10% | 16% | 2% |
| DK | 17% | 37% | 32% | 16% | 11% | 7% | 6% | 8% | 9% | 3% |
| DE | 35% | 32% | 18% | 22% | 10% | 13% | 5% | 3% | 19% | 0% |
| EE | 30% | 15% | 13% | 13% | 3% | 3% | 4% | 26% | 10% | 7% |
| IE | 37% | 40% | 9% | 9% | 7% | 8% | 4% | 9% | 5% | 4% |
| EL | 40% | 31% | 26% | 10% | 10% | 15% | 11% | 1% | 16% | 0% |
| ES | 37% | 9% | 16% | 28% | 14% | 13% | 17% | 4% | 15% | 2% |
| FR | 38% | 18% | 15% | 24% | 14% | 19% | 4% | 8% | 11% | 5% |
| IT | 29% | 24% | 40% | 15% | 7% | 9% | 7% | 1% | 9% | 4% |
| CY | 57% | 30% | 12% | 9% | 7% | 7% | 4% | 2% | 14% | 4% |
| LV | 29% | 27% | 22% | 16% | 9% | 8% | 6% | 7% | 9% | 2% |
| LT | 31% | 27% | 22% | 17% | 6% | 3% | 9% | 9% | 5% | 4% |
| LU | 34% | 21% | 14% | 18% | 14% | 13% | 11% | 2% | 17% | 4% |
| HU | 9% | 26% | 22% | 26% | 8% | 3% | 20% | 3% | 19% | 3% |
| MT | 63% | 23% | 15% | 6% | 16% | 15% | 10% | 3% | 6% | 1% |
| NL | 19% | 45% | 26% | 25% | 11% | 10% | 8% | 14% | 10% | 1% |
| AT | 36% | 38% | 17% | 18% | 5% | 8% | 7% | 12% | 12% | 4% |
| PL | 33% | 13% | 20% | 31% | 7% | 6% | 22% | 6% | 9% | 3% |
| PT | 45% | 18% | 33% | 24% | 11% | 18% | 19% | 5% | 4% | 2% |
| RO | 20% | 20% | 23% | 26% | 18% | 15% | 9% | 6% | 8% | 3% |
| SI | 55% | 21% | 25% | 12% | 13% | 6% | 12% | 7% | 3% | 0% |
| SK | 40% | 25% | 21% | 21% | 19% | 11% | 12% | 4% | 8% | 3% |
| FI | 26% | 24% | 42% | 43% | 25% | 20% | 9% | 5% | 6% | 0% |
| SE | 35% | 15% | 27% | 34% | 12% | 8% | 5% | 11% | 7% | 2% |
| UK | 34% | 37% | 14% | 18% | 27% | 11% | 12% | 4% | 11% | 2% |
| HR | 51% | 16% | 16% | 16% | 9% | 19% | 7% | 4% | 6% | 1% |
| TR | 20% | 26% | 25% | 50% | 16% | 18% | 15% | 1% | 0% | 5% |
| MK | 35% | 18% | 15% | 32% | 2% | 8% | 18% | 0% | 10% | 3% |
| IS | 23% | 24% | 15% | 15% | 12% | 9% | 12% | 9% | 8% | 14% |
| ME | 12% | 65% | 22% | 21% | 17% | 18% | 19% | 2% | 0% | 0% |
| NO | 34% | 28% | 24% | 22% | 11% | 14% | 16% | 4% | 12% | 2% |
| RS | 19% | 53% | 8% | 10% | 20% | 15% | 5% | 17% | 2% | 1% |
| AL | 28% | 22% | 23% | 8% | 10% | 4% | 14% | 4% | 13% | 0% |
| LI | 38% | 37% | 9% | 7% | 10% | 11% | 7% | 18% | 5% | 5% |
| IL | 33% | 11% | 25% | 13% | 7% | 12% | 7% | 13% | 11% | 5% |
| US | 29% | 44% | 22% | 9% | 16% | 20% | 6% | 2% | 9% | 9% |

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

Highest percentage per item | Lowest percentage per item

### 1.1.4 Why is this not being done?




In spite of the different incentives encouraging SMEs to take actions to improve resource efficiency, a number of issues hamper the implementation of such measures.

However, **the largest segment of EU SMEs reports that they did not encounter any difficulties when trying to introduce environmental actions (46%).** Just above a fifth of the SMEs faced difficulties regarding the complexity of administrative/legal procedures (22%) and the costs of environmental actions (21%). Lack of specific environmental expertise caused difficulties for 18% of SMEs in the EU.

SMEs are considerably more likely than large companies to report that they did not encounter any difficulties when trying to set up environmental actions (46% none vs. 37% for large companies). Secondly, cost of environmental actions (39% vs. 21% for SMEs) and difficulty to adapt legislation to the company (26% vs. 13%) seem to be more of a difficulty for large companies than for SMEs.

No major differences can be observed between country groups. However, difficulties with the costs of environmental actions are slightly more likely to be reported by EU15 than NMS12 companies (23% vs. 16%). Comparing the European situation with that of SMEs in the US suggests that SMEs in the US are generally more likely to report at least some problems (36% 'none' vs. 46% in the EU27) and also possibly more likely to have difficulties in identifying the problems that they may have encountered (20% 'don't know/not applicable' vs. 7% in the EU27).

The types of difficulties encountered by companies are to a certain extent linked to their size.

- Micro (48% none) and small companies (41%) report overall fewer difficulties than medium-sized (30%) and large companies (37%).

- Medium-sized enterprises (37%) are more likely to encounter difficulties with the complexity of administrative/legal procedures and the costs of environmental actions (34%) than smaller enterprises.

Q17 Did your company encounter any of the following difficulties when trying to set up environmental actions?

| | Complexity of administrative/ legal procedures | Cost of environmental actions | Lack of specific environmental expertise | Difficulty in choosing the right environmental actions for your company | Difficulty to adapt legislation to your company | Technical requirements of the legislation not being up to date | Other (DO NOT READ OUT) | None (DO NOT READ OUT) | DK/NA |
|---|---|---|---|---|---|---|---|---|---|
| EU27 | 22% | 21% | 18% | 14% | 13% | 9% | 1% | 46% | 7% |
| Company size | | | | | | | | | |
| 01-09 | 20% | 20% | 17% | 13% | 13% | 8% | 1% | 48% | 8% |
| 10-49 | 24% | 27% | 20% | 16% | 14% | 11% | 2% | 41% | 6% |
| 50-249 | 37% | 34% | 21% | 15% | 16% | 11% | 2% | 30% | 6% |

In nearly all Member States the largest segment of SMEs do not report encountering any difficulties when trying to set up environmental actions. The highest figures are observed in Estonia (79%), Austria (61%), Romania (61%) and Denmark (61%). The only exceptions to this pattern are Latvia (35%) and Poland (27%).

The **complexity of administrative/legal procedures** is the most frequently cited difficulty in companies in 12 Member States, particularly in Poland (35%) and Latvia (35%). On average, SMEs located in new Member States are more likely to complain about the complexity of administrative/legal procedures than EU15 SMEs (25% vs. 21%).

The **cost of environmental actions** is the most frequently reported difficulty in a further eight Member States with the highest figures observed in Portugal (32%), France (31%) and Spain (31%). A further 31% of Spanish SMEs also mention that that they encountered problems caused by **lack of specific environmental expertise**, followed 31% of Finnish SMEs.

Q17 Did your company encounter any of the following difficulties when trying to set up environmental actions?

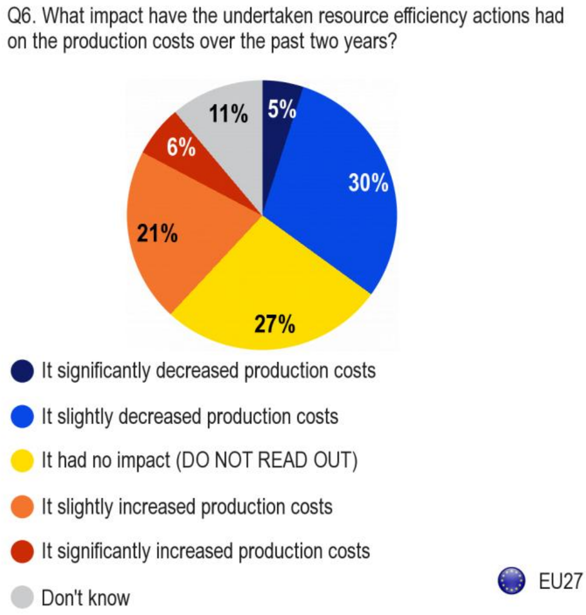
| | Complexity of administrative/ legal procedures | Cost of environmental actions | Lack of specific environmental expertise | Difficulty in choosing the right environmental actions for your company | Difficulty to adapt legislation to your company | Technical requirements of the legislation not being up to date | Other (DO NOT READ OUT) | None (DO NOT READ OUT) | Don't know |
|---|---|---|---|---|---|---|---|---|---|
| EU27 | 22% | 21% | 18% | 14% | 13% | 9% | 1% | 46% | 7% |
| BE | **18%** | 12% | 12% | *7%* | 9% | *7%* | 0% | 51% | 8% |
| BG | **20%** | 8% | 13% | 9% | *6%* | 8% | 7% | 41% | 9% |
| CZ | **26%** | 17% | 11% | 10% | *6%* | 8% | 2% | 57% | 4% |
| DK | 4% | **12%** | 7% | 5% | 5% | *2%* | 3% | 61% | 11% |
| DE | 13% | 13% | **14%** | 10% | 7% | *3%* | 2% | 56% | 9% |
| EE | **4%** | **4%** | 2% | 1% | 2% | *0%* | 1% | 79% | 10% |
| IE | 8% | **14%** | **14%** | *4%* | 5% | 6% | 1% | 49% | 17% |
| EL | **31%** | 26% | 18% | 14% | *10%* | 17% | 3% | 44% | 3% |
| ES | **32%** | 31% | 31% | 20% | 22% | *17%* | 0% | 45% | 3% |
| FR | 29% | **31%** | 23% | 25% | 22% | *13%* | 2% | 36% | 8% |
| IT | 16% | **18%** | 9% | 9% | 11% | *4%* | 1% | 51% | 8% |
| CY | *5%* | 8% | 9% | 7% | **11%** | 8% | 2% | 52% | 25% |
| LV | **35%** | 16% | 19% | *13%* | *13%* | 14% | 1% | 35% | 10% |
| LT | **10%** | 8% | 9% | 7% | 9% | *4%* | 7% | 50% | 11% |
| LU | **19%** | 18% | 11% | 14% | *4%* | 6% | 0% | 48% | 7% |
| HU | 18% | **21%** | 8% | 7% | 10% | *4%* | 2% | 44% | 12% |
| MT | 13% | **15%** | 6% | 8% | 7% | *4%* | 7% | 52% | 5% |
| NL | **17%** | **17%** | **17%** | 13% | 10% | *7%* | 2% | 41% | 8% |
| AT | **10%** | 6% | 8% | 5% | *3%* | 4% | 1% | 61% | 12% |
| PL | **35%** | 19% | 24% | 15% | 15% | *6%* | 0% | 27% | 5% |
| PT | 23% | **32%** | 20% | 20% | 23% | *15%* | 5% | 38% | 8% |
| RO | 11% | **12%** | 7% | *5%* | 6% | *5%* | 1% | 61% | 6% |
| SI | **19%** | 15% | *5%* | *5%* | 6% | 6% | 3% | 54% | 6% |
| SK | **23%** | 14% | *7%* | 10% | 10% | 8% | 2% | 48% | 12% |
| FI | 25% | 29% | **31%** | 25% | 17% | *13%* | 1% | 42% | 0% |
| SE | 12% | **18%** | 13% | 13% | 10% | *5%* | 1% | 48% | 7% |
| UK | 12% | 23% | **24%** | 10% | 10% | *9%* | 1% | 49% | 12% |
| HR | 24% | 10% | 9% | 7% | 3% | 9% | 0% | 55% | 7% |
| TR | 37% | 23% | 21% | 19% | 16% | 22% | 0% | 39% | 2% |
| MK | 12% | 14% | 4% | 9% | 14% | 6% | 3% | 53% | 6% |
| IS | 19% | 12% | 18% | 13% | 8% | 6% | 1% | 36% | 22% |
| ME | 18% | 2% | 2% | 0% | 3% | 5% | 2% | 60% | 13% |
| NO | 17% | 20% | 18% | 16% | 10% | 8% | 2% | 46% | 5% |
| RS | 23% | 9% | 9% | 0% | 10% | 1% | 2% | 40% | 14% |
| AL | 10% | 15% | 24% | 0% | 3% | 3% | 0% | 47% | 10% |
| LI | 4% | 5% | 10% | 1% | 1% | 4% | 1% | 47% | 32% |
| IL | 5% | 8% | 6% | 5% | 5% | 3% | 14% | 46% | 17% |
| US | 18% | 17% | 15% | 11% | 11% | 9% | 1% | 36% | 20% |

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

Highest percentage per item Lowest percentage per item

## 1.2 Does it pay to be "clean and green"?

***- Measures to promote resource efficiency reduce production costs for a majority of EU companies -***




Base: SMEs answered 'at least one action' in Q3

**62% of SMEs undertake resource efficiency actions at no particular production cost for them or with the result of decreasing their production costs.** For 35% of SMEs in the EU, undertaking resource efficiency actions has decreased the production costs and no impact is experienced by 27% of SMEs. Also 27% of SMEs report that their production costs have increased. For the largest proportion of SMEs, this decrease or increase has been modest with 30% reporting a slight decrease and 21% a slight increase.

When comparing results in the EU and the US, US SMEs are much more likely to report increased production costs than SMEs in the EU (38% in the US vs. 27% in the EU).

The size of the company appears to play a significant role in terms of the impact of resource efficiency actions on production costs:

Large companies are considerably more likely than SMEs to report that undertaking resource efficiency actions reduced their production costs (56% vs. 35% for SMEs) while SMEs indicate more often that such actions have had a negative impact on their production costs (27% vs. 15% for large companies). Micro companies are the most likely of all to report that undertaking resource efficiency actions had no impact on their production costs (29%).

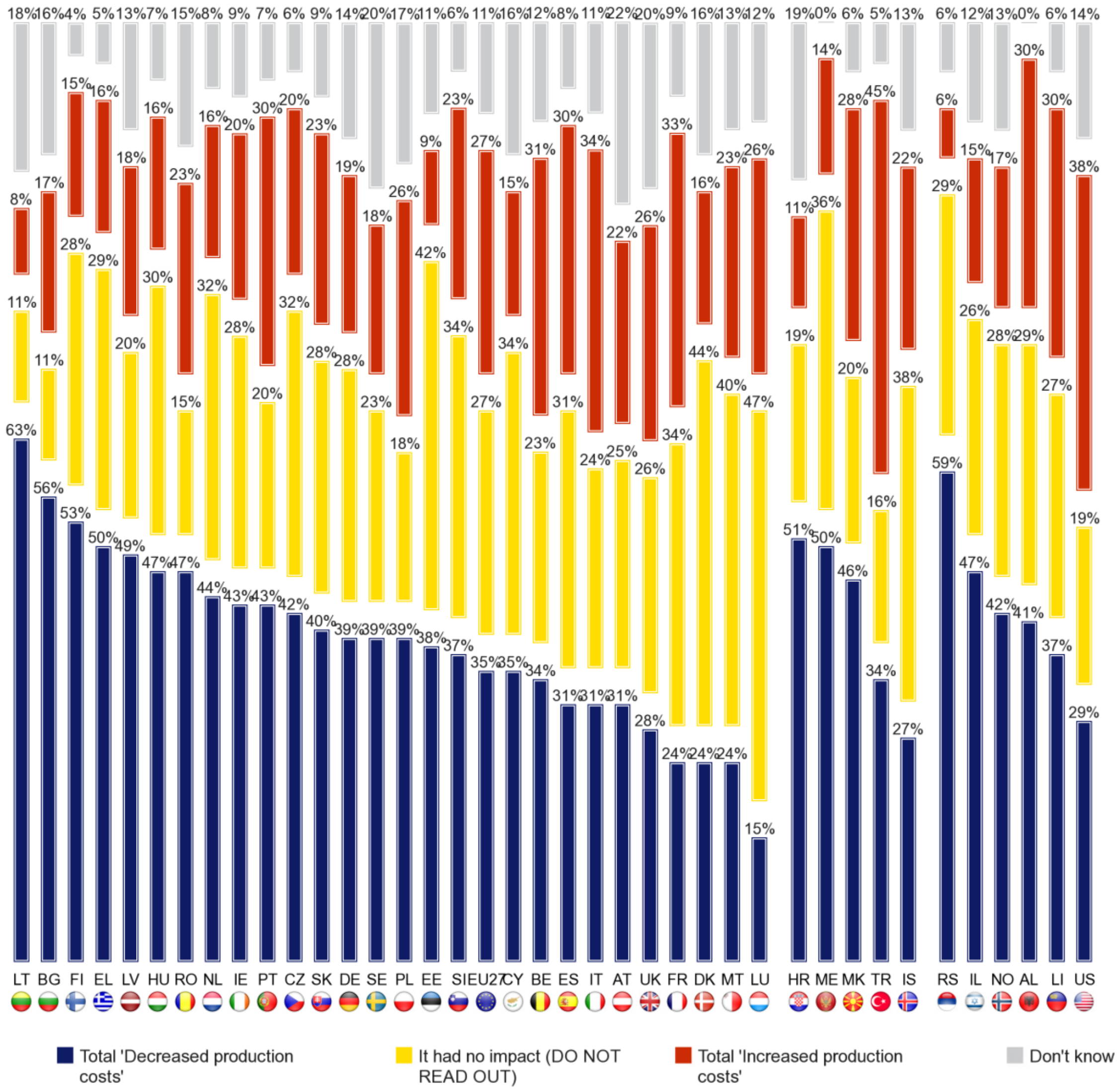
Q6 What impact have the undertaken resource efficiency actions had on the production costs over the past two years?

| | It significantly decreased production costs | It slightly decreased production costs | It had no impact (DO NOT READ OUT) | It slightly increased production costs | It significantly increased production costs | DK/NA |
|---|---|---|---|---|---|---|
| EU27 | 5% | 30% | 27% | 21% | 6% | 11% |
| Company size | | | | | | |
| 01-09 | 4% | 28% | 29% | 21% | 6% | 12% |
| 10-49 | 5% | 39% | 22% | 18% | 6% | 10% |
| 50-249 | 6% | 42% | 16% | 20% | 3% | 13% |

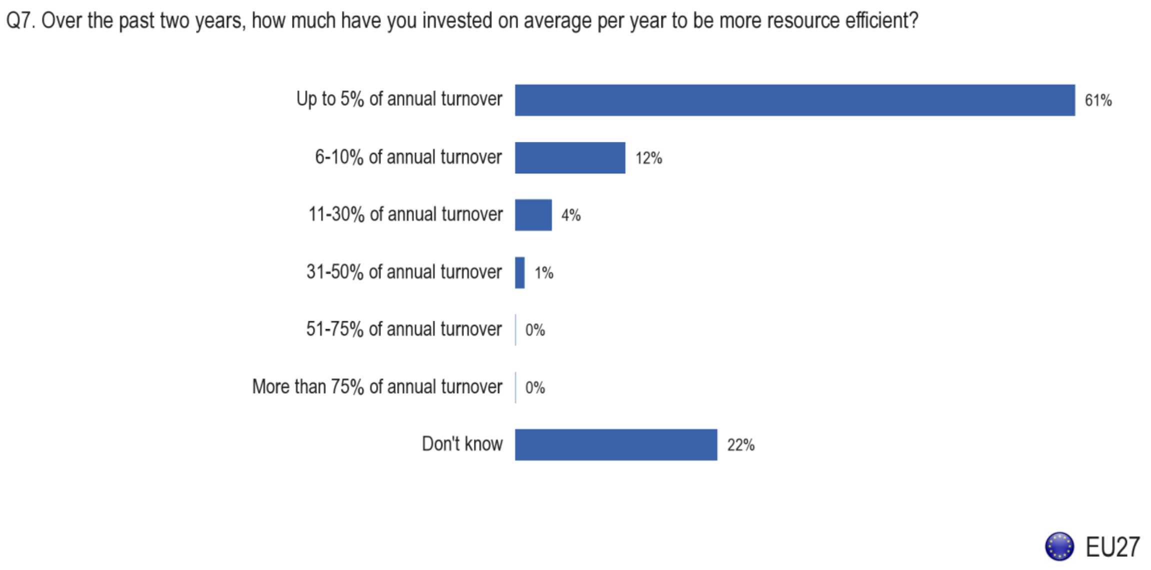
The following findings emerge from the country-by-country results:

- In 21 Member States, the largest segment of SMEs report a reduction in production costs. The highest figures are observed in Lithuania (63%), Bulgaria (56%) and Finland (53%). High figures are also recorded in Serbia (59%), Croatia (51%) and Montenegro (50%).
- In 6 Member States, a majority of SMEs say that resource efficiency measures have had no impact, most strikingly in Luxembourg (47%), Denmark (44%) and Estonia (42%). Outside the EU, SMEs in Iceland (38%) and Montenegro (36%) are the most likely to report no impact.
- SMEs in Italy (34%) and France (33%) are most likely to report an increase in production costs within the EU. The highest result overall is observed in Turkey (45%), followed by the US (38%).
- Finally, SMEs with reporting increased production costs outweigh those with decreased production costs in only a handful of countries, namely Luxembourg, France and Italy as well as the US and Turkey.

Q6. What impact have the undertaken resource efficiency actions had on the production costs over the past two years?



***- Investments in resource efficiency are relatively limited -***




Base: SMEs answered 'at least one action' in Q3

**In the EU, three SMEs in five (61%) invest 5% or less of their annual turnover in improving resource efficiency.** 12% dedicate 6-10% of their turnover to such investments and 4% spend 11-30%.

SMEs in the US are slightly more likely to indicate they spend 6-10% of their annual turnover to be more resource efficient than SMEs in the EU (17% vs. 12%).

SMEs are more likely to report that they invest up to 5% of their annual turnover than large companies (61% vs. 53%). This is largely due to the fact that representatives of large companies are more likely to answer 'don't know' to the question (36% vs. 22% for SMEs).

SMEs in manufacturing and industry appear to invest more in resource efficiency actions than companies whose main activity is retail or services.

**Q7 Over the past two years, how much have you invested on average per year to be more resource efficient?**

| | Up to 5% of annual turnover | 6-10% of annual turnover | 11-30% of annual turnover | 31-50% of annual turnover | 51-75% of annual turnover | More than 75% of annual turnover | DK/NA |
|---|---|---|---|---|---|---|---|
| EU27 | 61% | 12% | 4% | 1% | 0% | 0% | 22% |
| **Company size** | | | | | | | |
| 01-09 | 61% | 11% | 4% | 1% | 0% | 0% | 23% |
| 10-49 | 63% | 13% | 4% | 1% | 0% | 1% | 18% |
| 50-249 | 57% | 14% | 1% | 2% | 1% | 1% | 24% |
| **Sectors grouped (NACE)** | | | | | | | |
| Manufacturing (C) | 61% | 15% | 4% | 1% | 1% | 0% | 18% |
| Retail (G) | 62% | 10% | 3% | 1% | 0% | 0% | 24% |
| Services (I/J/K/H/L/M) | 62% | 9% | 3% | 1% | 0% | 0% | 25% |
| Industry (B/D/E/F) | 59% | 15% | 6% | 2% | 0% | 1% | 17% |

In all the countries surveyed but one, the highest proportion of SMEs report they invest **up to 5%** of their annual turnover in resource efficiency. 70% or more of SMEs in Denmark, France, Ireland, Poland, Latvia and Finland as well as in Norway belong to this group. The only exception to this pattern is Malta where the largest segment of SMEs reply 'don't know' to the question (49%).

Around a fifth or more of SMEs in Bulgaria (28%), Romania (21%), Finland (20%) and Portugal (19%) say that **6-10%** of their annual turnover is spent on actions improving resource efficiency. The highest figure overall is registered in FYROM (31%), followed by Montenegro (24%).

At the highest level, 14% of Slovenian SMEs indicate they invest **11-30%** of their annual turnover in resource efficiency actions, followed by 13% of Turkish SMEs.

Q7 Over the past two years, how much have you invested on average per year to be more resource efficient?

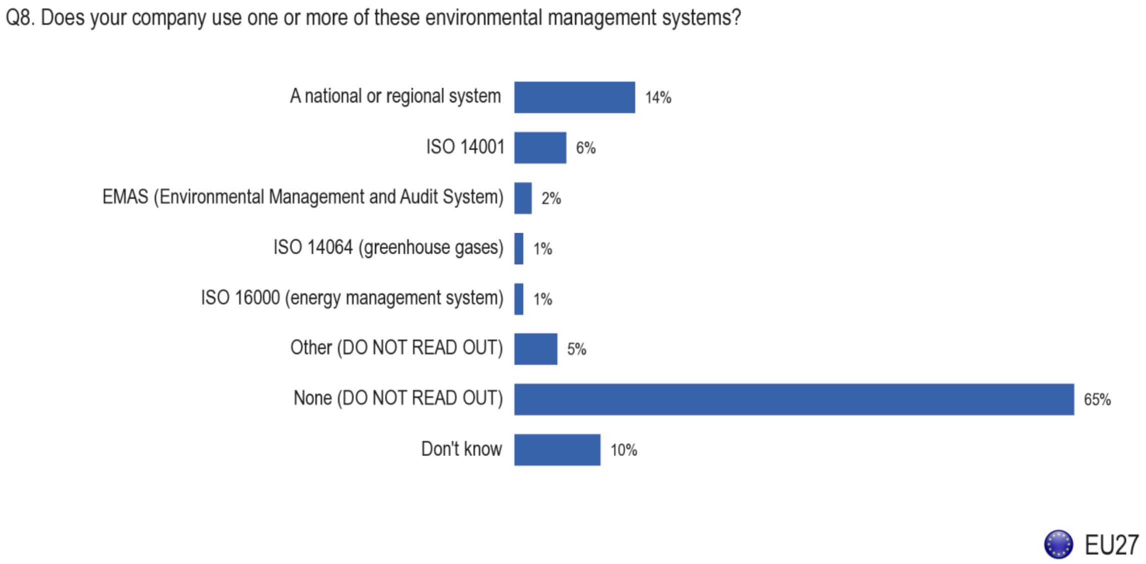
| | Up to 5% of annual turnover | 6-10% of annual turnover | 11-30% of annual turnover | 31-50% of annual turnover | 51-75% of annual turnover | More than 75% of annual turnover | Don't know |
|---|---|---|---|---|---|---|---|
| EU27 | 61% | 12% | 4% | 1% | 0% | 0% | 22% |
| BE | **51%** | 16% | 4% | 1% | 1% | *0%* | 27% |
| BG | **46%** | 28% | 5% | 2% | *0%* | 1% | 18% |
| CZ | **69%** | 13% | 2% | 1% | *0%* | *0%* | 15% |
| DK | **77%** | 7% | 2% | *0%* | *0%* | *0%* | 14% |
| DE | **64%** | 10% | 3% | *1%* | *1%* | *1%* | 20% |
| EE | **46%** | 8% | 1% | *0%* | *0%* | *0%* | 45% |
| IE | **70%** | 11% | 1% | *0%* | *0%* | 2% | 16% |
| EL | **65%** | 14% | 4% | 1% | *0%* | *0%* | 16% |
| ES | **61%** | 9% | 3% | *0%* | *0%* | *0%* | 27% |
| FR | **72%** | 7% | 1% | *0%* | *0%* | *0%* | 20% |
| IT | **49%** | 12% | 4% | 2% | *0%* | *0%* | 33% |
| CY | **52%** | 11% | 4% | *0%* | *0%* | *0%* | 33% |
| LV | **70%** | 7% | 2% | 2% | *1%* | *1%* | 17% |
| LT | **69%** | 10% | 4% | 2% | *0%* | 1% | 14% |
| LU | **59%** | 13% | 3% | *0%* | *0%* | *0%* | 25% |
| HU | **55%** | 10% | 4% | 2% | *0%* | 1% | 28% |
| MT | **40%** | 9% | *0%* | *0%* | 2% | *0%* | 49% |
| NL | **64%** | 10% | 7% | 1% | *0%* | *0%* | 18% |
| AT | **59%** | 11% | 4% | *0%* | 1% | *0%* | 25% |
| PL | **71%** | 12% | 7% | 2% | 1% | *0%* | 7% |
| PT | **59%** | 19% | 7% | 3% | *0%* | *0%* | 12% |
| RO | **48%** | 21% | 5% | 3% | *0%* | *0%* | 23% |
| SI | **58%** | 12% | 14% | *1%* | *1%* | *1%* | 13% |
| SK | **62%** | 15% | 3% | 1% | 1% | *0%* | 18% |
| FI | **70%** | 20% | 3% | 3% | *0%* | *0%* | 4% |
| SE | **63%** | 17% | 5% | 1% | 1% | *0%* | 13% |
| UK | **62%** | 9% | 2% | 1% | *0%* | *0%* | 26% |
| HR | 67% | 11% | 2% | 0% | 0% | 1% | 19% |
| TR | 44% | 21% | 13% | 8% | 3% | 0% | 11% |
| MK | 42% | 31% | 8% | 0% | 0% | 0% | 19% |
| IS | 56% | 5% | 1% | 0% | 0% | 0% | 38% |
| ME | 53% | 24% | 8% | 2% | 0% | 0% | 13% |
| NO | 76% | 12% | 3% | 1% | 0% | 0% | 8% |
| RS | 60% | 13% | 3% | 2% | 0% | 2% | 20% |
| AL | 49% | 18% | 3% | 0% | 0% | 0% | 30% |
| LI | 63% | 14% | 1% | 0% | 0% | 3% | 19% |
| IL | 45% | 14% | 7% | 1% | 0% | 1% | 32% |
| US | 57% | 17% | 3% | 2% | 0% | 2% | 19% |

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

| Highest percentage per item | Lowest percentage per item |
|---|---|

## 1.3 Environmental management systems: a tool enabling companies to improve their environmental performance

***- A quarter of SMEs in the EU use an environmental management system -***




Base: Companies answered 'at least one action' in Q3

**25% of SMEs in the EU report that they have an environmental management system in place.** A national or regional environmental management system is the most widely used, 14% of SMEs in the EU indicating that they have such a system. 6% of SMEs report they use ISO 14001. Other types of environmental management systems are used in only a few companies.

Environmental management systems are more widespread in companies located in EU15 countries than in the more recent Member States (27% vs. 19% for NMS12), particularly in the case of national and regional systems (16% vs. 5%). Environmental management systems are also considerably more common in SMEs in the EU (25%) than in the US (10%). This is particularly true for national and regional systems (14% vs. 3% in the US).

Large companies (48%) are much more likely to use an environmental management system than SMEs (25%). Particularly heavier systems such as ISO and EMAS are more likely to be used in large companies whereas national and regional systems appear to be slightly more common in SMEs than in large companies (14% vs. 10%).

SMEs in manufacturing and industry (29% each) are more likely to have an environmental management system in place than companies whose primary activity is retail (24%) or services (22%). Developments in the SMEs' turnover in the last two years do not seem to have an impact in this respect.

Q8 Does your company use one or more of these environmental management systems?

| | A national or regional system | ISO 14001 | EMAS (Environmental Management and Audit System) | ISO 14064 (greenhouse gases) | ISO 16000 (energy management system) | Other (DO NOT READ OUT) | None (DO NOT READ OUT) | DK/NA |
|---|---|---|---|---|---|---|---|---|
| EU27 | 14% | 6% | 2% | 1% | 1% | 5% | 65% | 10% |
| **Company size** | | | | | | | | |
| 01-09 | 14% | 3% | 1% | 1% | 1% | 4% | 67% | 11% |
| 10-49 | 13% | 12% | 2% | 1% | 2% | 8% | 62% | 7% |
| 50-249 | 15% | 31% | 5% | 3% | 2% | 10% | 41% | 8% |
| **Sectors grouped (NACE)** | | | | | | | | |
| Manufacturing (C) | 15% | 8% | 1% | 1% | 2% | 5% | 62% | 9% |
| Retail (G) | 15% | 4% | 1% | 2% | 1% | 4% | 65% | 11% |
| Services (I/J/K/H/L/M) | 11% | 7% | 1% | 1% | 1% | 4% | 69% | 9% |
| Industry (B/D/E/F) | 16% | 7% | 3% | 2% | 2% | 6% | 61% | 10% |

At national level the main findings are as follows:

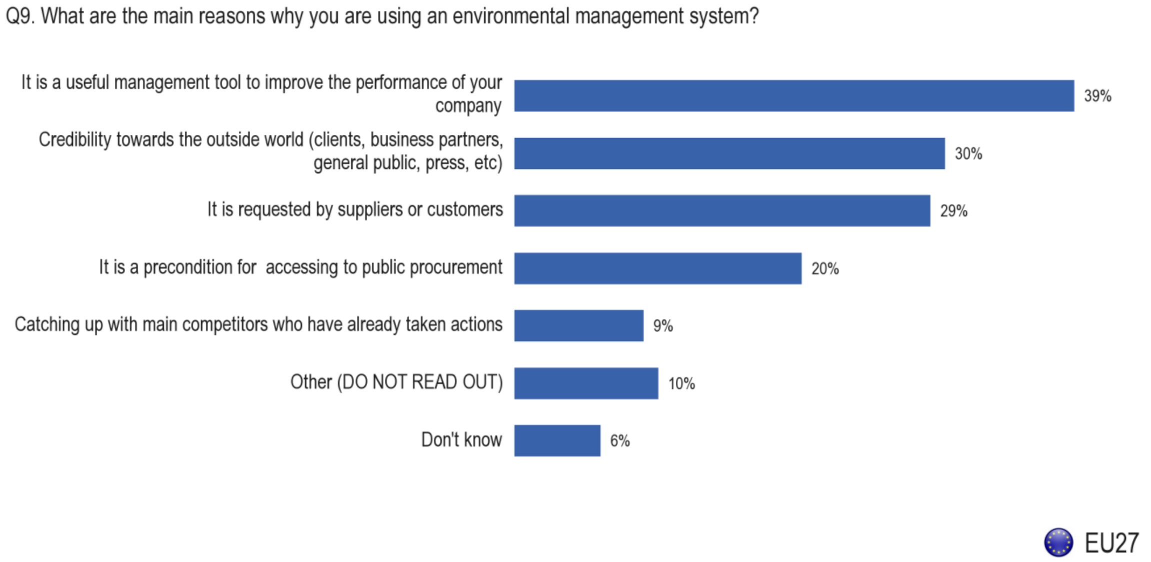
- The use of environmental management systems is the most widespread in Italy (54%), Luxembourg (39%) and Portugal (38%). Outside the EU, such systems are also common in Turkey (29%) and Israel (28%).
- These systems are least used in companies in Estonia (7%), Denmark (9%), Ireland (10%) and Belgium (10%). Overall, low figures are also recorded in the US (10%) and Albania (7%).
- In most Member States, national and regional systems are the most common type of environmental management system. Such systems are most commonly used in Italy (44%), Luxembourg (33%) and Portugal (23%).
- SMEs in Spain and Sweden are the most likely to use ISO 14100. Within the EU, EMAS is most commonly used in Portuguese companies (9%). One SME in 10 in Turkey reports that it uses the EMAS.

Q8 Does your company use one or more of these environmental management systems?

| | A national or regional system | ISO 14001 | EMAS (Environmental Management and Audit System) | ISO 14064 (greenhouse gases) | ISO 16000 (energy management system) | Other (DO NOT READ OUT) | None (DO NOT READ OUT) | Don't know |
|---|---|---|---|---|---|---|---|---|
| EU27 | 14% | 6% | 2% | 1% | 1% | 5% | 65% | 10% |
| BE | 6% | 1% | 2% | 0% | 0% | 3% | 81% | 9% |
| BG | 6% | 1% | 0% | 1% | 1% | 3% | 82% | 5% |
| CZ | 1% | 7% | 3% | 2% | 1% | 10% | 69% | 9% |
| DK | 3% | 3% | 0% | 1% | 0% | 3% | 88% | 3% |
| DE | 7% | 5% | 1% | 0% | 1% | 2% | 79% | 8% |
| EE | 1% | 2% | 0% | 0% | 0% | 3% | 88% | 5% |
| IE | 3% | 3% | 1% | 1% | 1% | 3% | 68% | 22% |
| EL | 1% | 8% | 0% | 0% | 2% | 9% | 73% | 7% |
| ES | 9% | 12% | 2% | 2% | 3% | 4% | 66% | 10% |
| FR | 4% | 3% | 0% | 1% | 0% | 4% | 77% | 11% |
| IT | 44% | 6% | 1% | 1% | 0% | 6% | 35% | 11% |
| CY | 0% | 2% | 5% | 0% | 0% | 16% | 73% | 5% |
| LV | 4% | 3% | 0% | 1% | 3% | 3% | 74% | 14% |
| LT | 4% | 2% | 2% | 2% | 3% | 2% | 68% | 18% |
| LU | 33% | 2% | 2% | 0% | 2% | 5% | 50% | 11% |
| HU | 1% | 7% | 1% | 1% | 1% | 9% | 77% | 6% |
| MT | 6% | 4% | 0% | 0% | 0% | 7% | 77% | 7% |
| NL | 5% | 7% | 1% | 1% | 2% | 4% | 71% | 11% |
| AT | 6% | 2% | 1% | 1% | 0% | 3% | 72% | 17% |
| PL | 9% | 2% | 1% | 2% | 4% | 3% | 73% | 8% |
| PT | 23% | 7% | 9% | 7% | 5% | 5% | 48% | 14% |
| RO | 5% | 8% | 3% | 2% | 2% | 3% | 70% | 8% |
| SI | 11% | 8% | 2% | 2% | 2% | 7% | 68% | 5% |
| SK | 3% | 7% | 1% | 2% | 3% | 2% | 82% | 7% |
| FI | 5% | 7% | 0% | 0% | 1% | 2% | 85% | 2% |
| SE | 4% | 12% | 1% | 1% | 1% | 3% | 72% | 9% |
| UK | 8% | 5% | 4% | 2% | 1% | 3% | 71% | 11% |
| HR | 2% | 4% | 0% | 0% | 1% | 6% | 79% | 8% |
| TR | 9% | 9% | 10% | 5% | 4% | 4% | 68% | 3% |
| MK | 7% | 1% | 5% | 1% | 4% | 4% | 66% | 14% |
| IS | 9% | 3% | 0% | 0% | 0% | 6% | 70% | 12% |
| ME | 0% | 11% | 2% | 0% | 0% | 5% | 77% | 7% |
| NO | 13% | 7% | 0% | 0% | 0% | 5% | 69% | 6% |
| RS | 2% | 9% | 0% | 0% | 0% | 13% | 68% | 9% |
| AL | 5% | 1% | 0% | 0% | 0% | 1% | 75% | 18% |
| LI | 3% | 3% | 0% | 1% | 0% | 7% | 62% | 25% |
| IL | 12% | 4% | 2% | 1% | 4% | 10% | 57% | 15% |
| US | 3% | 0% | 3% | 0% | 2% | 2% | 66% | 24% |

| **Highest percentage per country** | *Lowest percentage per country* |
|---|---|
| Highest percentage per item | Lowest percentage per item |

***- Four out of ten SMEs consider an environmental management system to be a useful tool for improving company performance -***




Base: SMEs answered ‘using at least one environmental management system’ in Q8

Those SMEs that have currently an environmental management system in place were asked to indicate the main reasons why they are using such a system.

39% of SMEs in the EU consider an environmental management system to be a useful tool for improving company performance. 30% say it gives them increased credibility in the outside world and 29% mention that it is a response to demand from suppliers or customers. One SME in five cites the preconditions for public procurement as a reason to adopt an environmental management system.

‘Credibility towards the outside world’ (49% vs. 30%) and ‘it is a useful management tool to improve the performance of your company’ (51% vs. 39%) are considerably more likely to be mentioned among large companies than among SMEs as a reason why they are using environmental management systems.

SMEs located in NMS12 are much more likely to mention demand from suppliers or customers as a reason for using an environmental management system (41% vs. 27% in EU15). Conversely, EU15 companies are more likely to say that an environmental system is a useful management tool for improving company performance (40% vs. 32% in NMS12).

The bases at national level are too small for a detailed analysis.


Base: SMEs answered 'not using at least one environmental management system' in Q8

Those SMEs that do not currently use a management system were asked to give their reasons for not doing so.

**The most common reasons mentioned are the lack of demand from suppliers or customers (30%) and no demand from legislation (29%).** For a fifth or more of companies, high implementation and running costs (24%) and lack of information (20%) constitute reasons for failing to adopt an environmental management system.

There are distinct differences observed between SMEs in the EU and the US. Lack of information (28% vs. 20% for EU27) and the absence of demand from customers or suppliers (42% vs. 30% for EU27) are considerably more likely to be mentioned by SMEs in the US, while SMEs in the EU are much more likely to give 'no demand from legislation' as the main reason for not having an environment management system in place (29% vs. 13% for the US).

Large companies are significantly more likely to indicate 'other sector standards are more important' (32% vs. 10%) and 'uncertain market benefits' (21% vs. 10%) as reasons why they are not using an environmental management system. Conversely, high implementing costs and running costs are much more of an issue for SMEs than for large companies (24% vs. 7%).

**Q10 What are the main reasons why you are not using an environmental management system?**

| | No demand from suppliers or customers | No demand from legislation | High implementing costs and running costs | lack of information about environmental management systems and their benefits | lack of specific environmental expertise within your company | Uncertain market benefits | lengthy time to apply | Other sector standards are more important | Other (DO NOT READ OUT) | DK/NA |
|---|---|---|---|---|---|---|---|---|---|---|
| EU27 | 30% | 29% | 24% | 20% | 11% | 10% | 9% | 10% | 11% | 9% |
| **Company size** | | | | | | | | | | |
| 01-09 | 31% | 28% | 24% | 20% | 10% | 10% | 8% | 8% | 11% | 9% |
| 10-49 | 28% | 32% | 26% | 18% | 15% | 8% | 13% | 15% | 10% | 8% |
| 50-249 | 35% | 28% | 35% | 23% | 8% | 12% | 13% | 13% | 10% | 5% |

At national level the main findings are as follows:

- In 14 Member States, the reason most often mentioned by SMEs is that there is **no demand from customers or suppliers** for an environmental management system. The highest figures are observed in Poland (39%), Hungary (39%) and Finland (38%). This is also the most frequently reported reason among companies in the US (42%).
- **No demand from legislation** is the reason most likely to be mentioned by companies in seven Member States, led by Estonia (53%), Greece (41%) and Denmark (36%). A high figure is also recorded in Liechtenstein (47%).
- **High implementation and running costs** are most likely to be cited by companies in Spain (35%), Portugal (29%) and the Czech Republic (29%).
- Finally, **lack of information** is the most commonly reported reason in Romania (31%) and Malta (28%). Very high figures for this item are recorded outside the EU in Montenegro (70%), Serbia (61%) and Albania (59%).

**Q10 What are the main reasons why you are not using an environmental management system?**

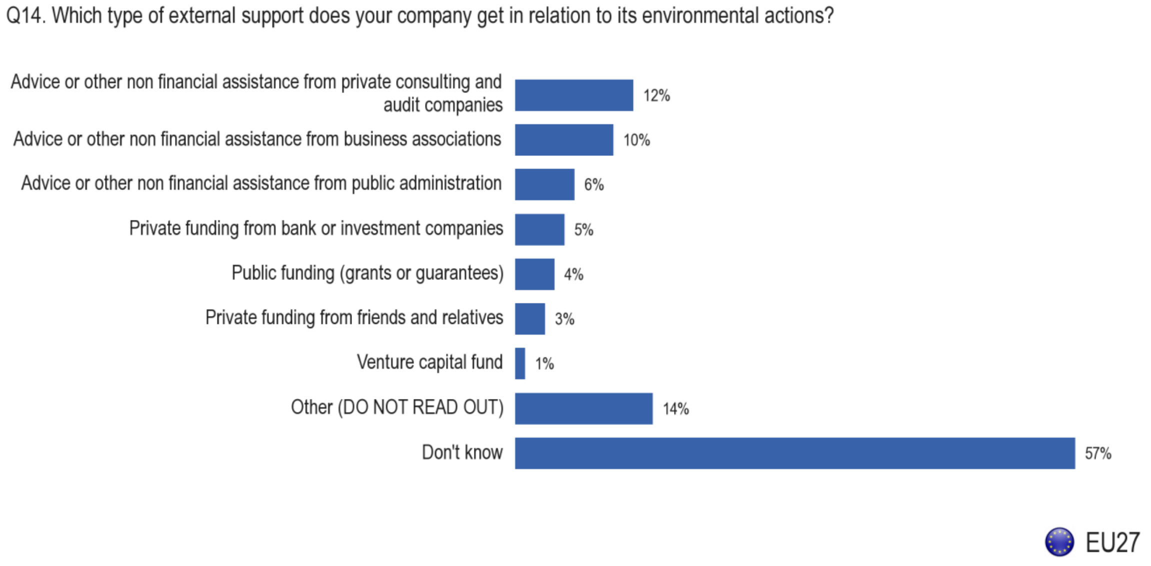
| | No demand from suppliers or customers | No demand from legislation | High implementing costs and running costs | lack of information about environmental management systems and their benefits | lack of specific environmental expertise within your company | Uncertain market benefits | Other sector standards are more important | lengthy time to apply | Other (DO NOT READ OUT) | Don't know |
|---|---|---|---|---|---|---|---|---|---|---|
| EU27 | 30% | 29% | 24% | 20% | 11% | 10% | 10% | 9% | 11% | 9% |
| BE | **32%** | 29% | 15% | 26% | 11% | 9% | 3% | 9% | 9% | 12% |
| BG | **32%** | 27% | 11% | 19% | 7% | 6% | 8% | 1% | 12% | 9% |
| CZ | 27% | 21% | **29%** | 17% | 6% | 9% | 14% | 9% | 13% | 12% |
| DK | 28% | **36%** | 12% | 14% | 6% | 4% | 6% | 11% | 19% | 7% |
| DE | **32%** | 31% | 23% | 17% | 9% | 10% | 10% | 13% | 16% | 10% |
| EE | 11% | **53%** | 6% | 6% | 0% | 1% | 5% | 3% | 29% | 8% |
| IE | 14% | 15% | **27%** | 13% | 5% | 4% | 3% | 4% | 10% | 25% |
| EL | 36% | **41%** | 26% | 11% | 8% | 19% | 14% | 6% | 10% | 3% |
| ES | 26% | 33% | **35%** | 19% | 9% | 10% | 15% | 5% | 5% | 8% |
| FR | **33%** | 32% | 27% | 29% | 14% | 6% | 5% | 17% | 9% | 7% |
| IT | 22% | **31%** | 21% | 12% | 6% | 12% | 12% | 8% | 12% | 4% |
| CY | **20%** | 11% | 15% | 13% | 3% | 14% | 2% | 2% | 30% | 14% |
| LV | **36%** | 30% | 14% | 31% | 7% | 13% | 9% | 4% | 12% | 3% |
| LT | 28% | **32%** | 13% | 15% | 8% | 5% | 3% | 5% | 20% | 7% |
| LU | 25% | **33%** | 9% | 26% | 9% | 4% | 10% | 6% | 5% | 17% |
| HU | **39%** | 24% | 24% | 5% | 8% | 9% | 10% | 7% | 16% | 7% |
| MT | 9% | 26% | 20% | **28%** | 4% | 0% | 9% | 8% | 11% | 9% |
| NL | **36%** | 24% | 19% | 13% | 9% | 6% | 9% | 1% | 25% | 8% |
| AT | **25%** | 22% | 8% | 16% | 11% | 4% | 16% | 12% | 23% | 11% |
| PL | **39%** | 33% | 15% | 18% | 18% | 13% | 7% | 6% | 6% | 8% |
| PT | 18% | 25% | **29%** | 20% | 12% | 11% | 10% | 13% | 11% | 13% |
| RO | 29% | 13% | 29% | **31%** | 7% | 3% | 6% | 5% | 10% | 12% |
| SI | 25% | **29%** | 24% | 9% | 6% | 9% | 10% | 12% | 20% | 5% |
| SK | **36%** | 35% | 24% | 9% | 9% | 8% | 12% | 13% | 8% | 11% |
| FI | **38%** | 32% | 23% | 27% | 6% | 7% | 20% | 4% | 9% | 11% |
| SE | **30%** | 21% | 15% | 12% | 12% | 3% | 3% | 13% | 14% | 8% |
| UK | **32%** | 17% | 27% | 29% | 21% | 14% | 7% | 7% | 5% | 13% |
| HR | 23% | 30% | 19% | 27% | 2% | 1% | 13% | 3% | 18% | 0% |
| TR | 32% | 32% | 17% | 35% | 9% | 18% | 6% | 9% | 9% | 8% |
| MK | 40% | 16% | 25% | 28% | 4% | 4% | 1% | 4% | 7% | 6% |
| IS | 26% | 20% | 17% | 20% | 13% | 15% | 6% | 5% | 7% | 18% |
| ME | 5% | 5% | 22% | 70% | 2% | 0% | 12% | 5% | 6% | 3% |
| NO | 23% | 33% | 15% | 14% | 10% | 4% | 7% | 6% | 17% | 10% |
| RS | 4% | 5% | 17% | 61% | 8% | 3% | 8% | 3% | 14% | 0% |
| AL | 7% | 25% | 23% | 59% | 20% | 5% | 0% | 1% | 0% | 10% |
| LI | 34% | 47% | 6% | 9% | 7% | 0% | 28% | 7% | 18% | 4% |
| IL | 17% | 17% | 10% | 8% | 5% | 8% | 8% | 1% | 29% | 11% |
| US | 42% | 13% | 24% | 28% | 16% | 7% | 5% | 4% | 1% | 16% |

**Highest percentage per country** | *Lowest percentage per country*

Highest percentage per item | Lowest percentage per item

## 1.4 Do policies help companies to become resource efficient?

### *1.4.1 General overview*




Base: SMEs answered 'at least one action' in Q3

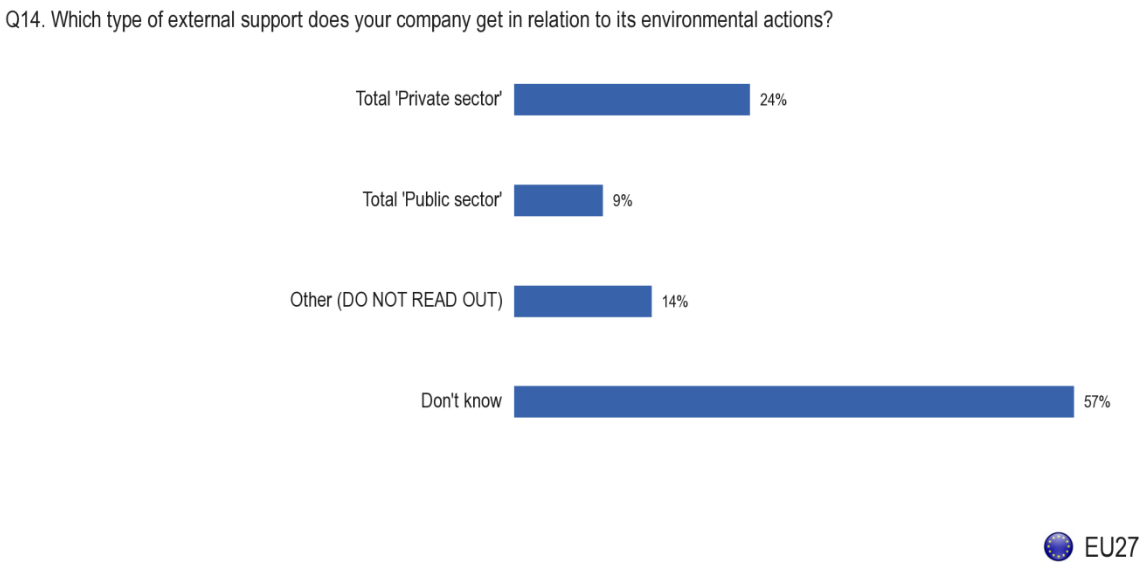
**43% of SMEs in the EU report they receive external support in relation to their environmental actions.** Those who are able to identify any source of support are most likely to mention advice and other non-financial assistance from private consulting and audit companies (12%) and similar assistance from business associations (10%). Very few SMEs appear to receive direct financial support, with 5% receiving private funding from a bank or investment company, 4% public funding and 3% private funding from friends and relatives. 57% of the SMEs are not concerned by any type of external support or answered 'don't know/not applicable' to the question.

Representative of large companies are considerably more likely to name one or more sources of external support than those of SMEs. Large companies are more often using all types of external support, particularly advice or other non financial assistance from private consulting and audit companies (28% vs. 12%) and advice or other non financial assistance from business associations (20% vs. 10%).

**Q14 Which type of external support does your company get in relation to its environmental actions?**

| | Advice or other non financial assistance from private consulting and audit companies | Advice or other non financial assistance from business associations | Advice or other non financial assistance from public administration | Private funding from bank or investment companies | Public funding (grants or guarantees) | Private funding from friends and relatives | Venture capital fund | Other (DO NOT READ OUT) | DK/NA |
|---|---|---|---|---|---|---|---|---|---|
| EU27 | 12% | 10% | 6% | 5% | 4% | 3% | 1% | 14% | 57% |
| **Company size** | | | | | | | | | |
| 01-09 | 9% | 8% | 5% | 4% | 3% | 3% | 1% | 15% | 59% |
| 10-49 | 18% | 13% | 7% | 5% | 4% | 2% | 1% | 13% | 50% |
| 50-249 | 31% | 20% | 16% | 6% | 9% | 2% | 2% | 9% | 34% |

Differences between the long-standing and more recent Member States remain mainly negligible. However, SMEs in the EU15 are considerably more likely to receive support from private sources than SMEs located in NMS12 countries. SMEs in the EU are slightly more likely to receive advice or other non financial assistance from private consulting and audit companies than SMEs located in the US (12% vs. 7%).




In short, there is more support to SMEs in the EU from the private sector (24%) than from the public sector (9%). 47% of large companies receive external support from private sector and 13% from public sector.

Medium-sized (48%) companies are considerably more likely to report that they receive private funding than small (32%) and micro (21%) companies. Medium-sized companies are the most likely to make use of public funding (21%), particularly advice or other non-financial assistance from public administration (16%).

**Q14 Which type of external support does your company get in relation to its environmental actions?**

| | Total 'Public sector' | Total 'Private sector' | Other (DO NOT READ OUT) | DK/NA |
|---|---|---|---|---|
| EU27 | 9% | 24% | 14% | 57% |
| **Company size** | | | | |
| 01-09 | 8% | 21% | 15% | 59% |
| 10-49 | 11% | 32% | 13% | 50% |
| 50-249 | 21% | 48% | 9% | 34% |

At national level, the findings are as follows:

- In nearly all the countries surveyed, SMEs are more likely to receive help from private sources than public sources.

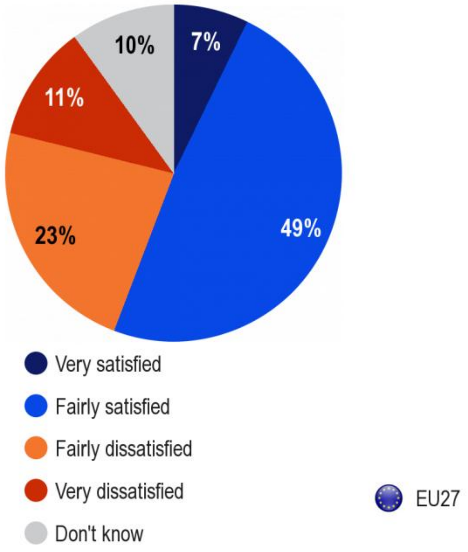
- Six out of ten or more SMEs report they receive external support in relation to their environmental actions in Greece (74%); Slovenia (68%), Denmark (64%).

- Advice and other non-financial assistance is the most common type of support in most Member States. Advice from private consulting and audit companies is particularly common in Spain (21%) and advice from business associations in Finland (21%).

### 1.4.2 Does public support work?

***- SMEs that receive public support are predominantly satisfied -***

Q15. Are you very satisfied, fairly satisfied, fairly dissatisfied or very dissatisfied with the level of public support for your environmental actions?




Base: Companies answered 'get public support' in Q14

**The majority of SMEs that receive public support for their environmental actions are satisfied with it (56%).** Just over a third of these SMEs express dissatisfaction in this respect (34%).

Satisfaction is considerably more widespread among SMEs located in the EU15 countries than in the NMS12 countries (60% vs. 38%). Public support is also considered in a more positive light by SMEs in the US[10] (65% vs. 56% EU27).

Large companies express higher levels of satisfaction with the level of public support for their environmental actions than SMEs (64% vs. 56%). Support from public sources is seen in more positive terms in small (65%) and medium-sized (61%) companies than in micro companies (53%). The highest satisfaction is observed among SMEs operating in the manufacturing sector (68%).

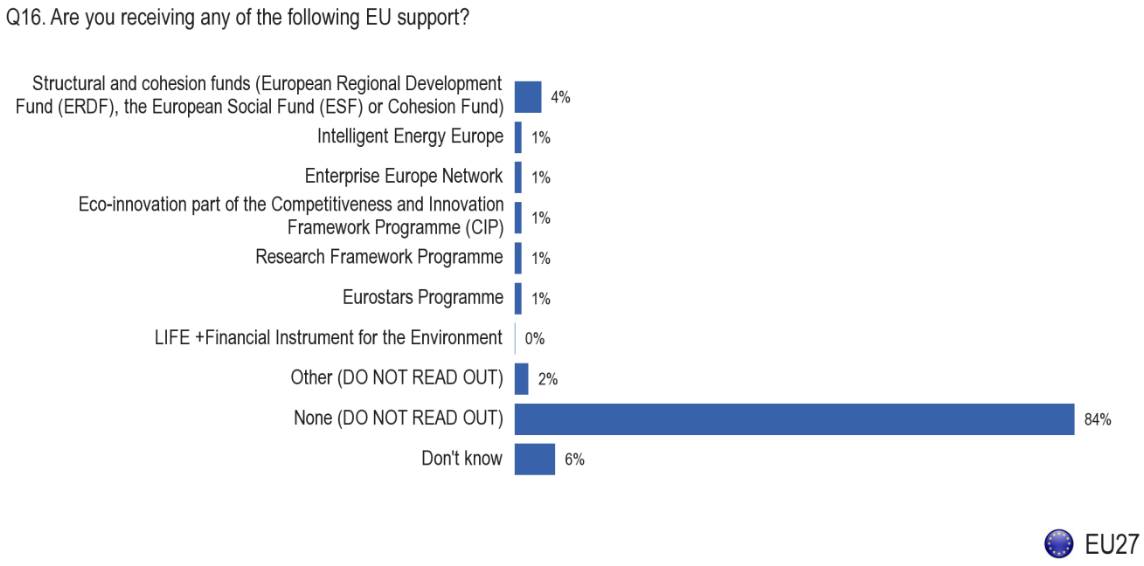
[10] N.B. The base of the US is low. Consequently, the results should be considered as indicative.

Q15 Are you very satisfied, fairly satisfied, fairly dissatisfied or very dissatisfied with the level of public support for your environmental actions?

| | Total 'Satisfied' | Total 'Dissatisfied' | DK/NA |
|---|---|---|---|
| EU27 | 56% | 34% | 10% |
| **Company size** | | | |
| 01-09 | 53% | 39% | 8% |
| 10-49 | 65% | 23% | 12% |
| 50-249 | 61% | 28% | 11% |
| **Sectors grouped (NACE)** | | | |
| Manufacturing (C) | 68% | 26% | 6% |
| Retail (G) | 56% | 29% | 15% |
| Services (I/J/K/H/L/M) | 51% | 42% | 7% |
| Industry (B/D/E/F) | 58% | 34% | 8% |

Due to the small bases per country, no national analysis has been carried out.

### - *Very few SMEs receive EU support* -




Base: SMEs answered 'get public support' in Q14

**One SME in 10 in the EU reports that they receive EU support.** Structural and cohesion funds rank highest with 4% receiving support from them.

At present, SMEs in the NMS12 countries (13%) are more likely to receive such support than SMEs in the EU15 countries (9%).

Large companies are more likely to receive EU support than SMEs (25% vs. 10%). The most commons source of EU funding for large companies is structural and cohesion funds (14%).
Also the likelihood of receiving EU support increases with the size of the SME (6% for micro companies to 21% for medium-sized companies). SMEs that operate in manufacturing (15%) or industry (13%) are more likely to report that they receive EU support than SMEs in retail (5%) and services (9%).

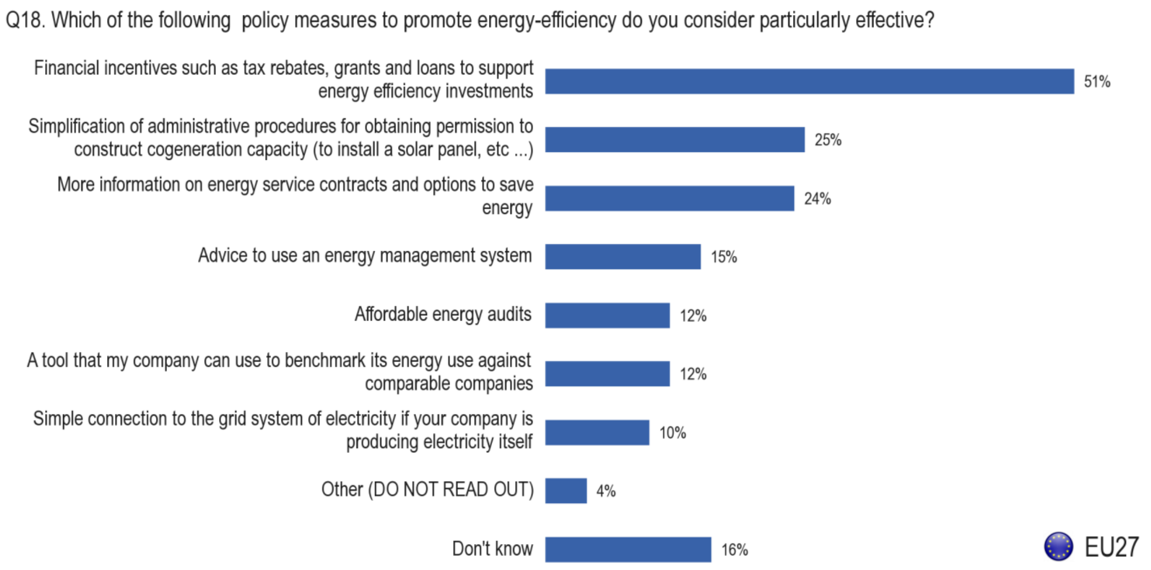
**Q16 Are you receiving any of the following EU support?**

| | Structural and cohesion funds (European Regional Development Fund (ERDF), the European Social Fund (ESF) or Cohesion Fund) | Enterprise Europe Network | Intelligent Energy Europe | Eco-innovation part of the Competitiveness and Innovation Framework Programme (CIP) | Eurostars Programme | Research Framework Programme | LIFE +Financial Instrument for the Environment | Other (DO NOT READ OUT) | None (DO NOT READ OUT) | DK/NA | Total 'receiving support' |
|---|---|---|---|---|---|---|---|---|---|---|---|
| EU27 | 4% | 1% | 1% | 1% | 1% | 1% | 0% | 2% | 84% | 6% | 10% |
| **Company size** | | | | | | | | | | | |
| 01-09 | 2% | 1% | 1% | 0% | 1% | 1% | 0% | 1% | 89% | 5% | 6% |
| 10-49 | 9% | 0% | 1% | 1% | 1% | 0% | 0% | 4% | 77% | 7% | 16% |
| 50-249 | 6% | 0% | 2% | 4% | 0% | 3% | 0% | 9% | 68% | 12% | 21% |
| **Sectors grouped (NACE)** | | | | | | | | | | | |
| Manufacturing (C) | 6% | 3% | 0% | 3% | 0% | 1% | 0% | 1% | 82% | 3% | 15% |
| Retail (G) | 1% | 2% | 0% | 0% | 0% | 0% | 0% | 2% | 92% | 3% | 5% |
| Services (I/J/K/H/L/M) | 4% | 0% | 1% | 0% | 0% | 0% | 0% | 4% | 81% | 10% | 9% |
| Industry (B/D/E/F) | 7% | 0% | 1% | 2% | 3% | 2% | 1% | 1% | 82% | 5% | 13% |

Due to the small bases per country, no national analysis has been carried out.

### *1.4.3 Supporting energy efficiency: where the focus should lie*

***- Financial incentives considered most effective measure to promote energy efficiency -***




**Over half (51%) of SMEs in the EU name financial incentives as the most effective policy measure to promote energy efficiency,** while around a quarter mention the 'simplification of administrative procedures for obtaining permission to construct cogeneration capacity' (25%) and 'increasing information on energy service contracts and options to save energy' (24%).

There are no major differences as to the most efficient policy measures between SMEs located in EU15 countries and NMS12 countries. However, measures such as advice about the use of an energy management system (16% vs. 9%) and affordable energy audits (13% vs. 7%) are more commonly mentioned by EU15 SMEs. SMEs in the EU are considerably more likely to mention financial incentives (51% vs. 36%) simplification of administrative procedures for obtaining permission to construct cogeneration capacity than SMEs in the US (25% vs. 11%).

Large companies are considerably more likely than SMEs to mention affordable energy audits (22% vs. 12%), advice to use an energy management system (24% vs. 15%) and financial incentives (60% vs.51%) as effective policy measures to promote energy efficiency.

National data reveal as follows:

- **Financial incentives** such as tax rebates, grants and loans to support energy efficiency investments are the most frequently cited policy measure in all EU Member States. The highest figures are observed in Greece (63%), Slovenia (62%), Austria (60%) and Poland (60%). Outside the EU, high figures are also recorded in Montenegro (75%) and Norway (64%).

- **Simplification of administrative procedures linked to the construction of cogeneration capacity** is most likely to be mentioned in Poland (34%) and Greece (33%). **More information on energy service contracts and options to save energy** is most commonly cited in Portugal (40%) and Spain (32%).

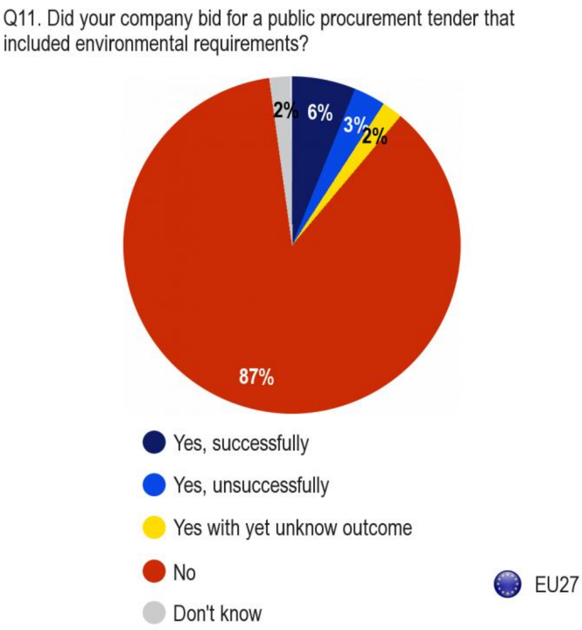
Q18 Which of the following policy measures to promote energy-efficiency do you consider particularly effective?

| | Financial incentives such as tax rebates, grants and loans to support energy efficiency investments | Simplification of administrative procedures for obtaining permission to construct cogeneration capacity (to install a solar panel, etc ...) | More information on energy service contracts and options to save energy | Advice to use an energy management system | Affordable energy audits | A tool that my company can use to benchmark its energy use against comparable companies | Simple connection to the grid system of electricity if your company is producing electricity itself | Other (DO NOT READ OUT) | Don't know |
|---|---|---|---|---|---|---|---|---|---|
| EU27 | 51% | 25% | 24% | 15% | 12% | 12% | 10% | 4% | 16% |
| BE | **37%** | 20% | 14% | 12% | 12% | 14% | *11%* | 7% | 22% |
| BG | **52%** | 23% | 12% | *4%* | 6% | 16% | 10% | 6% | 15% |
| CZ | **53%** | 25% | 19% | *5%* | 6% | 8% | *5%* | 2% | 27% |
| DK | **51%** | 13% | 14% | 16% | *8%* | 15% | 11% | 7% | 19% |
| DE | **57%** | 28% | 25% | 20% | *10%* | 17% | 15% | 1% | 11% |
| EE | **25%** | 8% | 11% | 5% | 8% | 5% | *2%* | 5% | 52% |
| IE | **45%** | 13% | 23% | 14% | 18% | *9%* | 10% | 1% | 19% |
| EL | **63%** | 33% | 17% | 11% | 9% | *6%* | 16% | 8% | 8% |
| ES | **54%** | 28% | 32% | 24% | 15% | *9%* | 11% | 3% | 11% |
| FR | **47%** | 24% | 23% | 16% | 16% | 21% | *6%* | 2% | 21% |
| IT | **51%** | 28% | 22% | 11% | 13% | *8%* | *8%* | 7% | 13% |
| CY | **39%** | 10% | 20% | 18% | 15% | 9% | *8%* | 24% | 23% |
| LV | **51%** | 18% | 18% | 10% | 13% | *5%* | 9% | 3% | 19% |
| LT | **34%** | 20% | 21% | 12% | *3%* | 10% | 11% | 5% | 28% |
| LU | **39%** | 26% | 22% | 21% | 7% | 9% | *5%* | 7% | 13% |
| HU | **48%** | 19% | 21% | 8% | 12% | *6%* | 9% | 9% | 15% |
| MT | **56%** | 24% | 19% | 12% | *2%* | 8% | 12% | 9% | 24% |
| NL | **39%** | 22% | 24% | 12% | *11%* | 12% | 18% | 2% | 25% |
| AT | **60%** | 23% | 28% | 14% | *5%* | 15% | 17% | 5% | 9% |
| PL | **60%** | 34% | 26% | 12% | *6%* | 10% | 9% | 0% | 10% |
| PT | **52%** | 28% | 40% | 17% | 22% | *10%* | 19% | 3% | 10% |
| RO | **53%** | 29% | 21% | 10% | *4%* | 5% | 6% | 1% | 18% |
| SI | **62%** | 27% | 12% | 9% | 14% | *8%* | 19% | 7% | 9% |
| SK | **53%** | 29% | 20% | 16% | 15% | 16% | *13%* | 3% | 14% |
| FI | **56%** | 15% | 27% | 15% | *10%* | 31% | *10%* | 2% | 17% |
| SE | **38%** | *8%* | 18% | 12% | 14% | 13% | 12% | 5% | 22% |
| UK | **50%** | 16% | 28% | 18% | 14% | 14% | *6%* | 1% | 25% |
| HR | 53% | 35% | 25% | 10% | 4% | 5% | 8% | 6% | 12% |
| TR | 33% | 17% | 25% | 15% | 26% | 13% | 4% | 3% | 18% |
| MK | 38% | 18% | 21% | 12% | 5% | 5% | 7% | 1% | 24% |
| IS | 34% | 9% | 18% | 8% | 14% | 8% | 4% | 1% | 35% |
| ME | 75% | 2% | 54% | 15% | 6% | 0% | 0% | 6% | 2% |
| NO | 64% | 15% | 21% | 23% | 16% | 15% | 11% | 2% | 7% |
| RS | 39% | 8% | 44% | 1% | 2% | 2% | 2% | 6% | 15% |
| AL | 28% | 9% | 30% | 16% | 3% | 5% | 10% | 0% | 32% |
| LI | 56% | 24% | 33% | 15% | 5% | 14% | 6% | 3% | 9% |
| IL | 38% | 11% | 9% | 13% | 7% | 4% | 6% | 23% | 19% |
| US | 36% | 11% | 25% | 15% | 12% | 10% | 6% | 4% | 28% |

| **Highest percentage per country** | *Lowest percentage per country* |
|---|---|
| Highest percentage per item | Lowest percentage per item |

## 1.5 Using public procurement to stimulate resource efficiency in SMEs

***- A limited number of SMEs participate in green public procurement -***



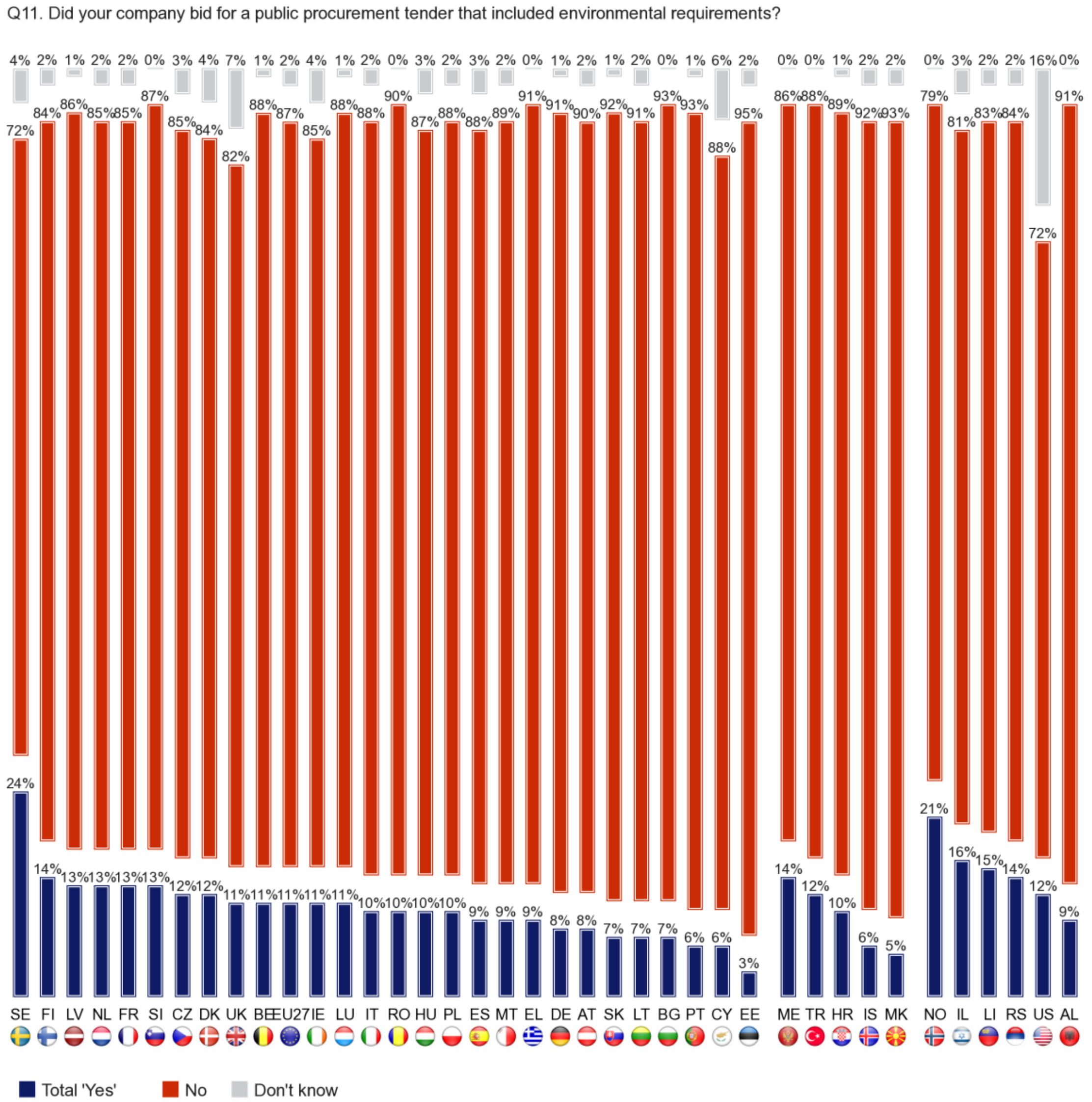

**11% of SMEs in the EU have bid for a public procurement tender that included environmental requirements.** 6% report that they have done so successfully while 3% were unsuccessful and 2% are still awaiting the outcome.

There are no differences as to the likelihood of participating in public tenders between the EU15 and NMS12 countries, nor between the European Union and the US.

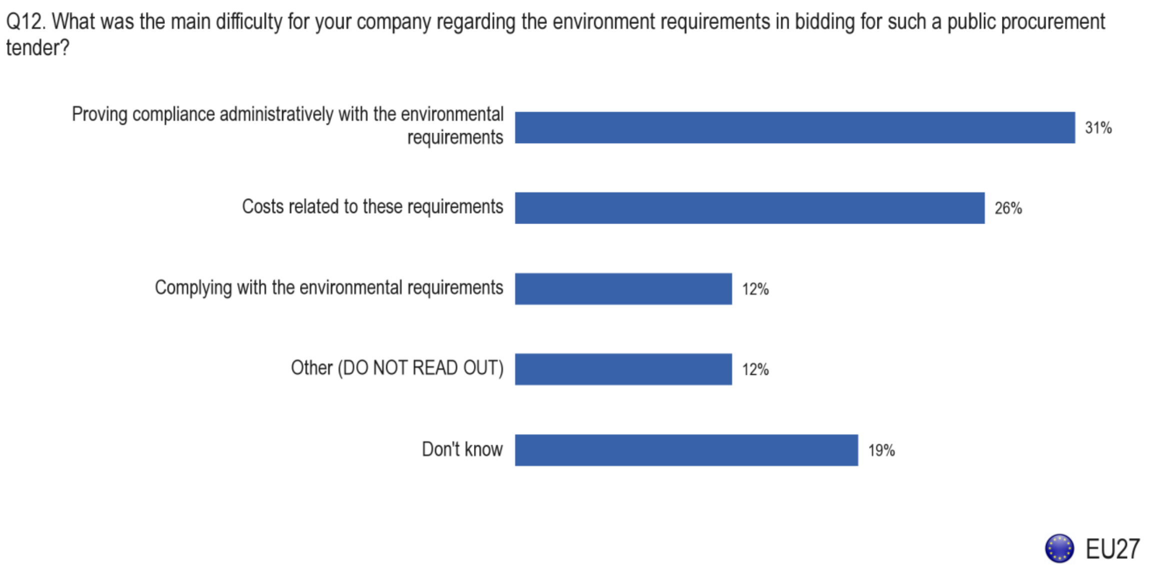
Large companies are somewhat more likely to participate in a public procurement tender than SMEs (16% vs. 11%). Among SMEs, medium-sized companies are the most likely to bid for a public tender (22%) while micro companies are the least likely to do so (9%). Most tenders are submitted by SMEs in the industry sector (20%).

**Q11** Did your company bid for a public procurement tender that included environmental requirements?

| | Yes, successfully | Yes, unsuccessfully | Yes with yet unknow outcome | No | DK/NA | Total 'Yes' |
|---|---|---|---|---|---|---|
| EU27 | 6% | 3% | 2% | 87% | 2% | 11% |
| **Company size** | | | | | | |
| 01-09 | 5% | 2% | 2% | 89% | 2% | 9% |
| 10-49 | 11% | 3% | 3% | 80% | 3% | 17% |
| 50-249 | 16% | 2% | 4% | 70% | 8% | 22% |
| **Sectors grouped (NACE)** | | | | | | |
| Manufacturing (C) | 5% | 2% | 1% | 90% | 2% | 8% |
| Retail (G) | 3% | 1% | 1% | 92% | 3% | 5% |
| Services (I/J/K/H/L/M) | 7% | 2% | 2% | 86% | 3% | 11% |
| Industry (B/D/E/F) | 9% | 7% | 4% | 79% | 1% | 20% |

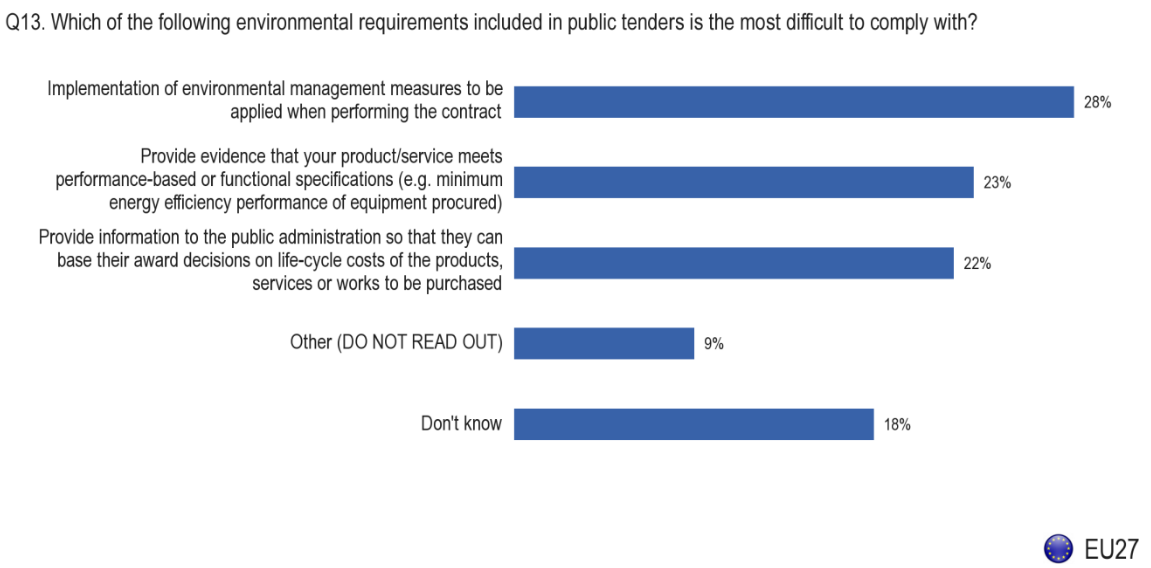



A quarter of Swedish SMEs (24%) have participated in public tenders with specific environmental requirements, followed by 14% of SMEs in Finland. A high figure is also observed in Norway (21%). SMEs in Estonia are the least likely to bid for such tenders (3%).




Base: SMEs answered 'bid for a public procurement tender including environmental requirements' in Q11

Most of the SMEs that have participated in a public tender with specific environmental requirements report that their main difficulty was the fact that they had to prove compliance administratively with the environmental requirements (31%), or mentioned the costs related to such requirements (26%). General compliance with the environmental requirements was mentioned by 12% of SMEs.




Base: SMEs answered 'bid for a public procurement tender including environmental requirements' in Q11

The 'implementation of environmental management measures to be applied when performing the contract' (28%) was identified as the most difficult requirement to comply with, followed closely by the requirement to 'provide evidence that the product/service meets performance-based or functional specifications' (23%) and 'provide information to the public administration so that they can base the award decision on life-cycle costs of the products, services or works to be purchased' (22%).

Large companies are more likely to mention providing information to the public administration so that they can base their award decisions on life-cycle costs of the products, services or works to be purchased as the most difficult requirement to comply with (27% vs. 22%) while SMEs are more likely to indicate providing evidence that your product/service meets performance-based or functional specifications as such difficulty (23% vs. 18%).

Due to the low base sizes, a national analysis is not possible for these questions.

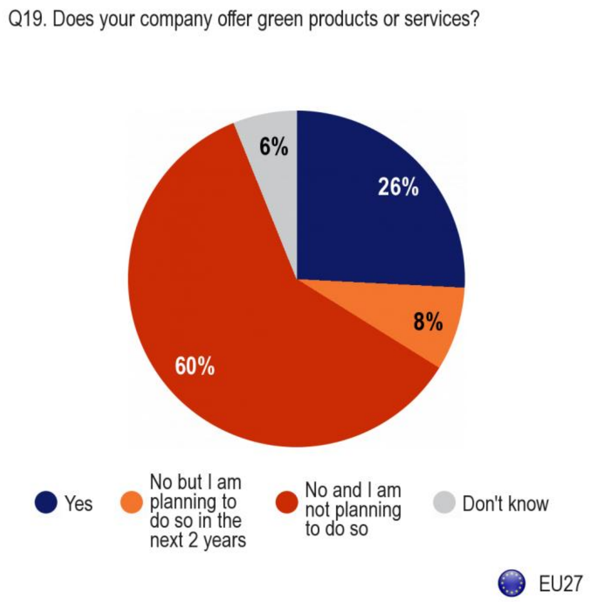
# 2. GREEN PRODUCTS AND SERVICES: REDUCING ENVIRONMENTAL RISK AND MINIMISING POLLUTION AND USE OF RESOURCES

This second part of the report will deal with those SMEs that currently operate in the green industry. We will firstly consider which green products and services SMEs offer, and to what extent. Secondly, the motivations and incentives behind green business will be examined. We will close the chapter by discussing the state of play of green jobs in the EU.

## 2.1 Green markets: Who are the SMEs offering green products or services

### *2.1.1 Mapping European green SMEs*

***- Just over a quarter of EU SMEs offer green products or services –***




26% of EU SMEs report that they offer green products or services. A further 8% intend to enter green business in the next two years. Nevertheless, the majority of SMEs in the EU (60%) are not offering such products or services.

There are relatively more SMEs currently offering green products or services in the EU15 than in the NMS12 countries (27% vs. 23%). However, green business seems to be picking up faster in the more recent Member States: 11% of NMS12 SMEs indicate they intend to move into green markets in the next two years, compared with 7% in the EU15 SMEs.

SMEs in the US are slightly more likely than SMEs in the EU to offer green products or services (30% vs. 26% in EU27). The future development of green business in the next two years in the US also appears slightly more positive than in the EU (11% vs. 8% in EU27).

Large companies are considerably more likely to offer green products or services than SMEs (42% vs. 26%). Similar proportions of companies in both groups intend to enter green business in the next two years (9% for large companies and 8% for SMEs).

Among SMEs, medium-sized (32%) companies are more likely to offer green products and services than small (27%) and micro (26%) companies. Similar proportions of SMEs in each size category are planning to do so in the next two years.

SMEs which are active in the retail (29%) and industry (31%) sectors are more likely to offer green products and services than manufacturing (24%) and services (22%) SMEs. The results also show that SMEs in retail (10%) and industry (9%) are the most likely to plan to do so in the next two years.

**Q19 Does your company offer green products or services?**

| | Yes | No but I am planning to do so in the next 2 years | No and I am not planning to do so | DK/NA |
|---|---|---|---|---|
| EU27 | 26% | 8% | 60% | 6% |
| **Company size** | | | | |
| 01-09 | 26% | 8% | 60% | 6% |
| 10-49 | 27% | 8% | 59% | 6% |
| 50-249 | 32% | 9% | 52% | 7% |
| **Sectors grouped (NACE)** | | | | |
| Manufacturing (C) | 24% | 7% | 62% | 7% |
| Retail (G) | 29% | 10% | 55% | 6% |
| Services (I/J/K/H/L/M) | 22% | 6% | 66% | 6% |
| Industry (B/D/E/F) | 31% | 9% | 55% | 5% |

The following observations can be made at national level:

- In virtually all the countries surveyed, the majority of SMEs does not sell green products or services and do not intend to do so in the next two years. The highest figures are observed in Hungary (76%), Malta (76%), Estonia (72%) and the Czech Republic (70%). Outside the EU, the largest proportions of such SMEs are found in Serbia (75%), Lichtenstein (74%) and Montenegro (71%).
- Around a third or more SMEs in Slovenia (36%), Austria (35%), Germany (34%), Demark (33%), Finland (32%) and Sweden (32%) are currently offering green products or services.
- The greatest proportion of SMEs intending to offer green products or services in the next two years is observed in Portugal (19%), Greece (18%), Romania (18%) and Cyprus (17%).

Q19 Does your company offer green products or services?

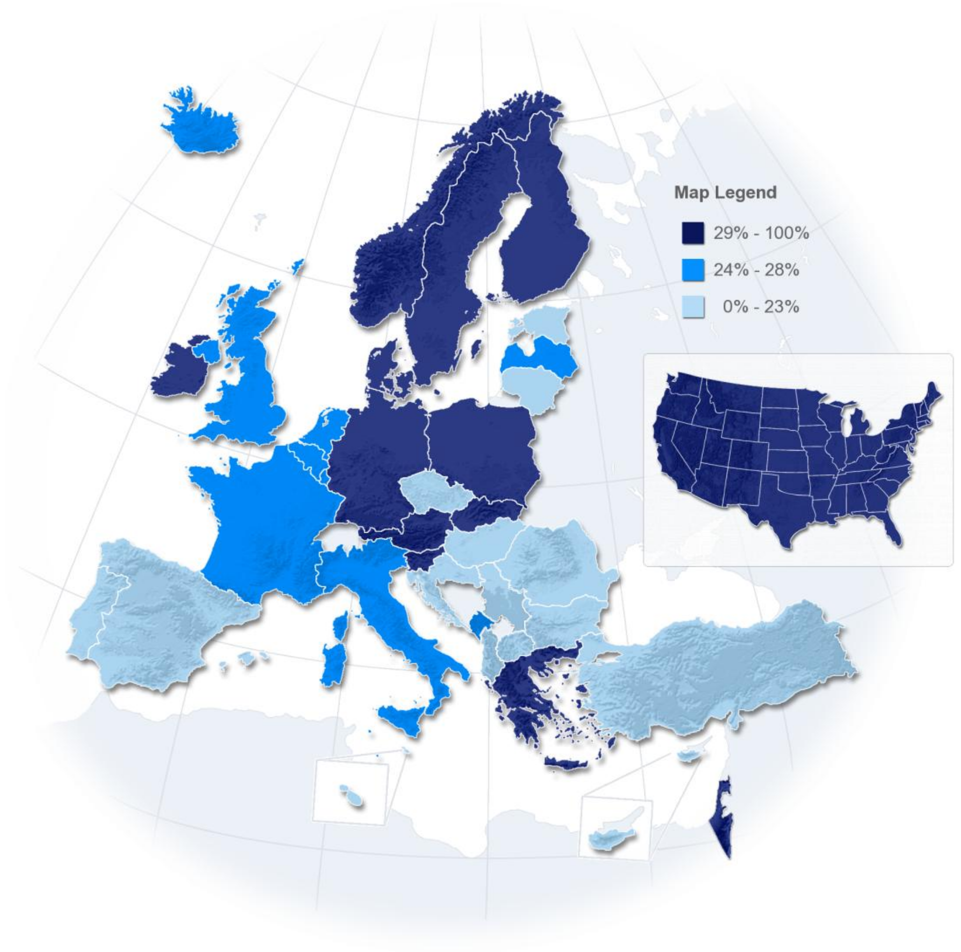
| | Yes | No but I am planning to do so in the next 2 years | No and I am not planning to do so | Don't know |
|---|---|---|---|---|
| EU27 | 26% | 8% | 60% | 6% |
| BE | 26% | 8% | 62% | 4% |
| BG | 21% | 12% | 63% | 4% |
| CZ | 21% | 7% | 70% | 2% |
| DK | 33% | 2% | 63% | 2% |
| DE | 34% | 6% | 56% | 4% |
| EE | 21% | 2% | 72% | 5% |
| IE | 29% | 5% | 41% | 25% |
| EL | 31% | 18% | 49% | 2% |
| ES | 23% | 5% | 67% | 5% |
| FR | 26% | 9% | 60% | 5% |
| IT | 26% | 4% | 61% | 9% |
| CY | 20% | 17% | 60% | 3% |
| LV | 24% | 10% | 61% | 5% |
| LT | 21% | 10% | 66% | 3% |
| LU | 25% | 9% | 64% | 2% |
| HU | 11% | 11% | 76% | 2% |
| MT | 18% | 3% | 76% | 3% |
| NL | 24% | 8% | 58% | 10% |
| AT | 35% | 5% | 57% | 3% |
| PL | 30% | 11% | 52% | 7% |
| PT | 21% | 19% | 48% | 12% |
| RO | 17% | 18% | 60% | 5% |
| SI | 36% | 9% | 54% | 1% |
| SK | 29% | 7% | 62% | 2% |
| FI | 32% | 6% | 58% | 4% |
| SE | 32% | 5% | 58% | 5% |
| UK | 28% | 7% | 58% | 7% |
| HR | 21% | 9% | 63% | 7% |
| TR | 15% | 12% | 70% | 3% |
| MK | 17% | 12% | 69% | 2% |
| IS | 28% | 8% | 60% | 4% |
| ME | 24% | 4% | 71% | 1% |
| NO | 46% | 3% | 47% | 4% |
| RS | 19% | 6% | 75% | 0% |
| AL | 9% | 15% | 67% | 9% |
| LI | 24% | 2% | 74% | 0% |
| IL | 32% | 10% | 49% | 9% |
| US | 30% | 11% | 39% | 20% |

| **Highest percentage per country** | *Lowest percentage per country* |
|---|---|
| Highest percentage per item | Lowest percentage per item |

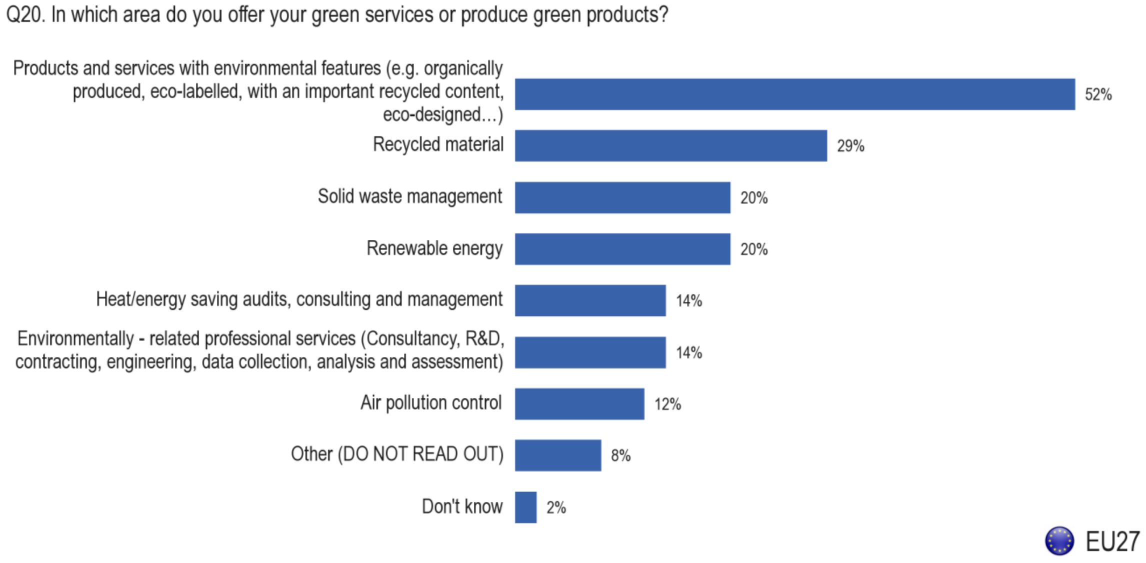
| | |
|---|---|
| SI | 36% |
| AT | 35% |
| DE | 34% |
| DK | 33% |
| SE | 32% |
| FI | 32% |
| EL | 31% |
| PL | 30% |
| SK | 29% |
| IE | 29% |
| UK | 28% |
| IT | 26% |
| EU | 26% |
| BE | 26% |
| FR | 26% |
| LU | 25% |
| NL | 24% |
| LV | 24% |
| ES | 23% |
| LT | 21% |
| BG | 21% |
| PT | 21% |
| EE | 21% |
| CZ | 21% |
| CY | 20% |
| MT | 18% |
| RO | 17% |
| HU | 11% |
| IS | 28% |
| ME | 24% |
| HR | 21% |
| MK | 17% |
| TR | 15% |
| NO | 46% |
| IL | 32% |
| US | 30% |
| LI | 24% |
| RS | 19% |
| AL | 9% |

Question: Q19. Does your company offer green products or services?

Answers: Yes



***– Half of the SMEs active in green markets offer products and services with environmental features –***




Base: SMEs answered 'offers green products or services' in Q19

For those SMEs that are currently selling green products or services, the survey identified the areas in which they do so.

52% of SMEs in the EU active in green markets offer products and services with environmental features. 29% offer green products or services in the area of recycled materials and 20% in renewable energy or in solid waste management.

A comparison of the results for EU15 and NMS12 SMEs indicates that EU15 SMEs are more likely to function in each area, particularly in recycled materials (31% vs. 22% in NMS12). There are also considerable differences between SMEs located in the EU and SMEs in the US. The latter are significantly more likely to report that they offer green services or produce green products in the areas of recycled material (55% vs. 29% in EU27), products and services with environmental features (72% vs. 52%) and air pollution control (27% vs. 12%).

There are no large differences in the areas in which green services or products are offered between large companies and SMEs but in one area, namely environmentally - related professional services: large companies are significantly more likely to offer such services than SMEs (31% vs. 14%).

Not surprisingly the sector to which an SME belongs affects the areas in which it offers green products and services. SMEs in the industry sector are more likely than the average to concentrate on renewable energy (40%) and heat/energy saving audits, consulting and management (31%) while SMEs in retail are more likely to sell products and services with environmental features (60%). SMEs in manufacturing focus on recycled materials (38%) and SMEs in the service sector are more likely than the average to offer environment-related professional services (19%).

Q20 In which area do you offer your green services or produce green products?

| | Products and services with environmental features (e.g. organically produced, eco-labelled, with an important recycled content, eco-designed...) | Recycled material | Renewable energy | Solid waste management | Heat/energy saving audits, consulting and management | Environmentally - related professional services (Consultancy, R&D, contracting, engineering, data collection, analysis and assessment) | Air pollution control | Other (DO NOT READ OUT) | DK/NA |
|---|---|---|---|---|---|---|---|---|---|
| EU27 | 52% | 29% | 20% | 20% | 14% | 14% | 12% | 8% | 2% |
| **Company size** | | | | | | | | | |
| 01-09 | 51% | 27% | 19% | 19% | 14% | 13% | 10% | 9% | 3% |
| 10-49 | 54% | 37% | 23% | 19% | 18% | 19% | 15% | 8% | 1% |
| 50-249 | 53% | 33% | 24% | 27% | 16% | 20% | 17% | 6% | 2% |
| **Sectors grouped (NACE)** | | | | | | | | | |
| Manufacturing (C) | 52% | 38% | 13% | 15% | 5% | 7% | 10% | 9% | 4% |
| Retail (G) | 60% | 31% | 8% | 18% | 7% | 7% | 10% | 9% | 4% |
| Services (I/J/K/H/L/M) | 51% | 22% | 22% | 23% | 14% | 18% | 15% | 8% | 1% |
| Industry (B/D/E/F) | 40% | 31% | 40% | 20% | 31% | 26% | 11% | 7% | 1% |

At national level, varied results can be observed:

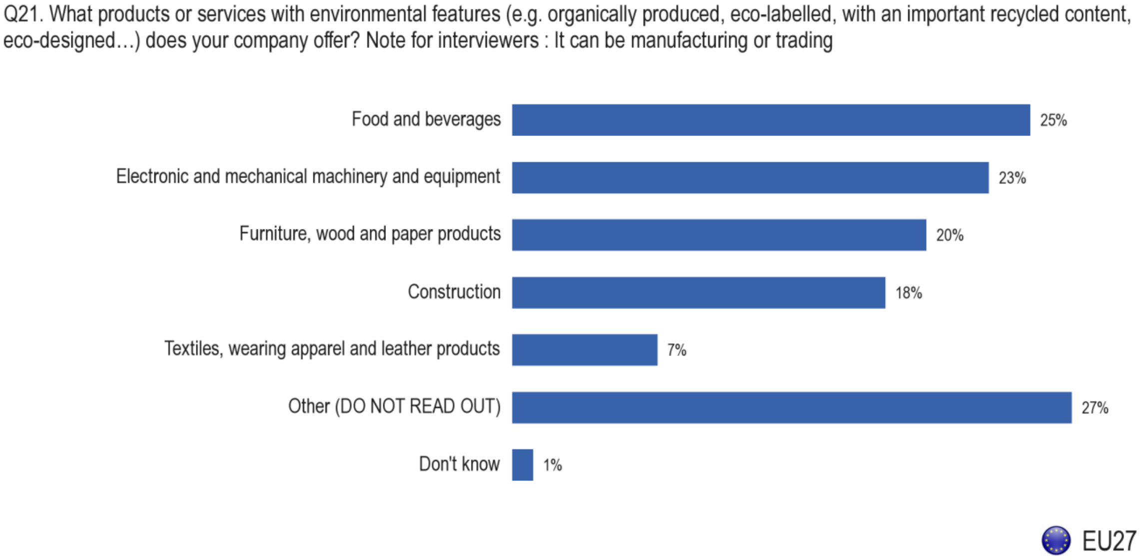
- In 22 Member States SMEs operating in the green markets are most likely to **offer products and services with environmental features**. The highest proportions are registered in Lithuania (78%), France (77%), Finland (69%) and Estonia (67%). Outside the EU, the highest figure is observed for the US (72%).
- In further five Member States, the area most often mentioned is **recycled material**. These countries are Portugal (59%), the UK (53%), Malta (43%), Cyprus (41%) and Hungary (32%).
- **Renewable energy** is most likely to be mentioned in Portugal (30%), Cyprus (25%) and the Netherlands (24%) while 57% of Portuguese and 33% of Spanish SMEs report that they offer solid waste management.

Q20 In which area do you offer your green services or produce green products?

| | Products and services with environmental features (e.g. organically produced, eco-labelled, with an important recycled content, eco-designed…) | Recycled material | Renewable energy | Solid waste management | Heat/energy saving audits, consulting and management | Environmentally - related professional services (Consultancy, R&D, contracting, engineering, data collection, analysis and assessment) | Air pollution control | Other (DO NOT READ OUT) | Don't know |
|---|---|---|---|---|---|---|---|---|---|
| EU27 | 52% | 29% | 20% | 20% | 14% | 14% | 12% | 8% | 2% |
| BE | 57% | 8% | 22% | 23% | 8% | 9% | 9% | 6% | 6% |
| BG | 43% | 35% | 13% | 8% | 5% | 24% | 9% | 17% | 0% |
| CZ | 58% | 22% | 16% | 7% | 21% | 22% | 3% | 5% | 3% |
| DK | 56% | 4% | 20% | 4% | 12% | 21% | 3% | 4% | 0% |
| DE | 57% | 20% | 22% | 8% | 12% | 10% | 6% | 13% | 2% |
| EE | 67% | 2% | 7% | 6% | 3% | 5% | 0% | 18% | 0% |
| IE | 28% | 27% | 23% | 6% | 22% | 24% | 3% | 8% | 0% |
| EL | 40% | 30% | 21% | 14% | 20% | 24% | 11% | 1% | 3% |
| ES | 56% | 44% | 16% | 33% | 19% | 16% | 20% | 2% | 2% |
| FR | 77% | 38% | 22% | 18% | 18% | 18% | 28% | 7% | 0% |
| IT | 34% | 19% | 23% | 26% | 6% | 7% | 7% | 13% | 1% |
| CY | 37% | 41% | 25% | 3% | 4% | 10% | 29% | 1% | 0% |
| LV | 41% | 9% | 20% | 6% | 9% | 15% | 5% | 23% | 5% |
| LT | 78% | 4% | 4% | 3% | 4% | 7% | 7% | 4% | 0% |
| LU | 43% | 36% | 23% | 15% | 8% | 7% | 17% | 8% | 1% |
| HU | 27% | 32% | 20% | 13% | 12% | 20% | 10% | 8% | 5% |
| MT | 23% | 43% | 1% | 1% | 8% | 10% | 16% | 18% | 0% |
| NL | 56% | 29% | 24% | 18% | 18% | 21% | 20% | 5% | 0% |
| AT | 58% | 15% | 16% | 14% | 17% | 12% | 15% | 14% | 0% |
| PL | 49% | 20% | 16% | 18% | 9% | 7% | 3% | 5% | 9% |
| PT | 54% | 59% | 30% | 57% | 26% | 35% | 24% | 2% | 0% |
| RO | 29% | 24% | 7% | 14% | 12% | 10% | 9% | 15% | 15% |
| SI | 37% | 12% | 20% | 4% | 14% | 9% | 3% | 15% | 1% |
| SK | 56% | 23% | 9% | 9% | 7% | 11% | 4% | 14% | 5% |
| FI | 69% | 22% | 10% | 16% | 13% | 12% | 2% | 10% | 0% |
| SE | 60% | 29% | 12% | 11% | 16% | 11% | 9% | 10% | 0% |
| UK | 50% | 53% | 21% | 22% | 23% | 21% | 7% | 9% | 5% |
| HR | 54% | 25% | 16% | 1% | 5% | 12% | 10% | 10% | 1% |
| TR | 21% | 45% | 11% | 11% | 19% | 18% | 23% | 6% | 8% |
| MK | 53% | 13% | 4% | 0% | 14% | 12% | 23% | 6% | 3% |
| IS | 55% | 21% | 8% | 5% | 6% | 4% | 7% | 16% | 9% |
| ME | 63% | 27% | 13% | 0% | 0% | 0% | 0% | 8% | 0% |
| NO | 56% | 36% | 25% | 45% | 5% | 11% | 7% | 9% | 0% |
| RS | 62% | 14% | 1% | 9% | 0% | 4% | 8% | 23% | 0% |
| AL | 35% | 37% | 1% | 26% | 0% | 26% | 59% | 0% | 1% |
| LI | 52% | 7% | 17% | 8% | 8% | 10% | 14% | 10% | 0% |
| IL | 31% | 32% | 15% | 17% | 10% | 13% | 7% | 7% | 7% |
| US | 72% | 55% | 15% | 26% | 19% | 23% | 27% | 1% | 5% |

**Highest percentage per country** *Lowest percentage per country*
Highest percentage per item Lowest percentage per item

***- Food and beverages and electronic and mechanical machinery and equipment are the most commonly sold green products and services -***




Base: SMEs answered 'offers green products or services' in Q19

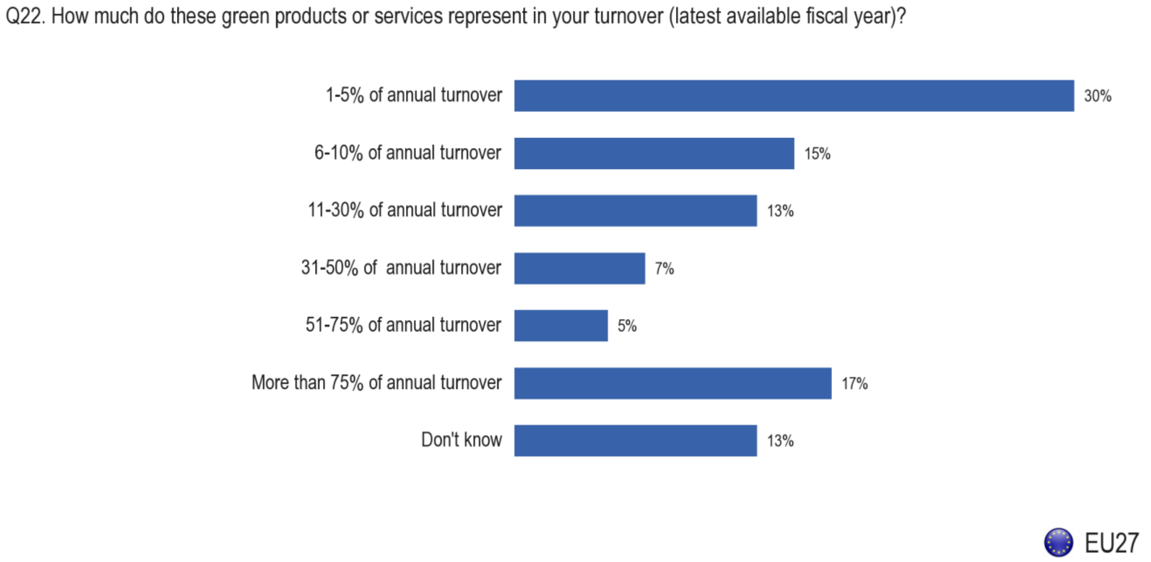
A quarter of SMEs in the EU that offer green services or products with environmental features sell food and beverages (25%). Electronic and mechanical machinery and equipment follow in second place (23%). Just below a fifth of SMEs offer furniture, wood and paper products (19%) and construction materials or services (18%).

There are no major differences between SMEs located in the NMS12 countries and those in EU15. However, SMEs in the US are considerably more likely to offer 'green' products or services in construction (41% vs. 18% in EU27) and electronic and mechanical machinery and equipment (34% vs. 23%) while SMEs in the EU are more likely to offer food and beverages (25% vs. 8% in the US) and other types of products and services with environmental features (27% vs. 8%).

SMEs are considerably more likely to offer green furniture, wood and paper products (20% vs. 11% for large companies) whereas large companies are more concentrated on electronic and mechanical machinery and equipment (27% vs. 23% for SMEs).

A national analysis is not possible for this question due to the small bases in most countries.

***- For most SMEs, green products or services represent 1-5% of the annual turnover -***




Base: SMEs answered 'offers green products or services' in Q19

SMEs which offer green products and services are most likely to report that these green products or services represent 1-5% of their annual turnover (30%). The second largest segment of SMEs (17%) generates more than 75% of annual turnover by selling green products or services followed by 15% of SMEs whose green products or services represent 6-10% of their annual turnover.

Differences between groups of countries and between the EU and the US remain relatively modest. However, the following observations can be made:

- SMEs in the NMS12 countries that are offering green products or services are less likely than EU15 SMEs to report that these green products and services represent 11-30% of their annual turnover (9% vs. 13%).

- SMEs in the US are considerably more likely to indicate that their green products or services represent 1-5% of their annual turnover than SMEs in the EU (44% vs. 30%).

The size of the company is linked to the amount of annual turnover their green products or services represent:

- Large companies are more likely to report that these green products or services represent 6-10% of their annual turnover (24% vs. 15% for SMEs) while SMEs are more inclined to report that such products or services represent 1-5% of their annual turnover (30% vs. 19% for large companies).

- Green products and services are most likely to represent 1-5% of the turnover of micro (29%), small (36%) and medium-sized companies (24%).

- For a high proportion of medium-sized companies (23%) green products or services represent over 75% of their annual turnover.

Q22 How much do these green products or services represent in your turnover (latest available fiscal year)?

| | 1-5% of annual turnover | 6-10% of annual turnover | 11-30% of annual turnover | 31-50% of annual turnover | 51-75% of annual turnover | More than 75% of annual turnover | DK/NA |
|---|---|---|---|---|---|---|---|
| EU27 | 30% | 15% | 13% | 7% | 5% | 17% | 13% |
| **Company size** | | | | | | | |
| 01-09 | 29% | 15% | 14% | 7% | 5% | 17% | 13% |
| 10-49 | 36% | 14% | 13% | 8% | 6% | 13% | 10% |
| 50-249 | 24% | 13% | 8% | 12% | 6% | 23% | 14% |

The following findings emerge from the national data:

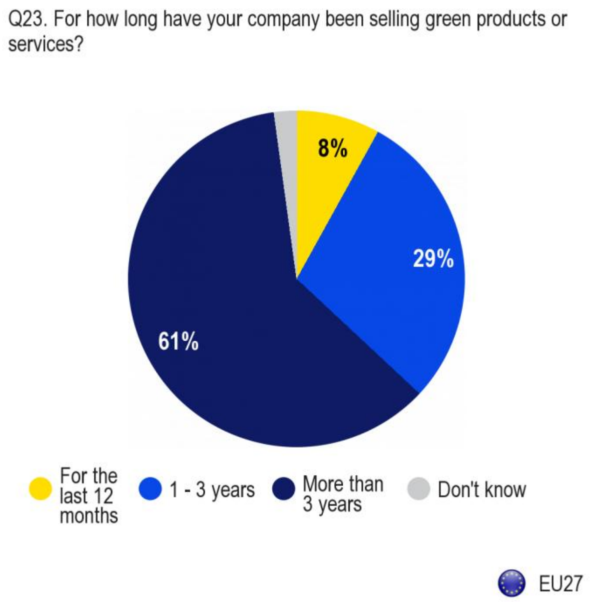
- In nearly all the countries surveyed, green products or services are most likely to represent 1-5% of a SME's annual turnover. This is the case in 20 Member States, led by Hungary (66%), Lithuania (45%) and Bulgaria (43%). Outside the EU, the highest figures are registered in Montenegro (76%), Albania (59%) and Croatia (50%).
- In Estonia (43%), Greece (38%) and Latvia (29%) the highest proportion of SMEs selling green products or services report that over 75% of their annual turnover is generated by these green products or services. Over a quarter of SMEs in Liechtenstein (29%) and Croatia (26%) also belong to this group.
- In Austria (27%) and Sweden (24%) SMEs are most likely to report that green products and services represent 11-30% of their annual turnover.

Q22 How much do these green products or services represent in your turnover (latest available fiscal year)?

| | 1-5% of annual turnover | 6-10% of annual turnover | 11-30% of annual turnover | 31-50% of annual turnover | 51-75% of annual turnover | More than 75% of annual turnover | Don't know |
|---|---|---|---|---|---|---|---|
| EU27 | 30% | 15% | 13% | 7% | 5% | 17% | 13% |
| BE | **32%** | *3%* | 15% | 12% | 11% | 15% | 11% |
| BG | **43%** | 21% | 8% | 8% | *0%* | 17% | 3% |
| CZ | **36%** | 10% | 15% | *7%* | 9% | 17% | 6% |
| DK | **27%** | 14% | 17% | 6% | *0%* | 22% | 13% |
| DE | **29%** | 18% | 18% | 6% | *2%* | 14% | 13% |
| EE | 24% | 12% | 6% | 5% | *4%* | **43%** | 6% |
| IE | **34%** | 12% | 14% | 4% | *2%* | 26% | 8% |
| EL | 22% | 9% | 11% | *3%* | 11% | **38%** | 7% |
| ES | **37%** | 12% | 20% | *1%* | 4% | 12% | 13% |
| FR | **35%** | 16% | 18% | 13% | *2%* | 6% | 8% |
| IT | **24%** | 13% | 6% | 10% | *5%* | 20% | 23% |
| CY | **40%** | 12% | *1%* | 21% | 2% | 13% | 12% |
| LV | **29%** | 5% | 14% | 5% | *3%* | **29%** | 16% |
| LT | **45%** | 8% | 8% | 18% | *7%* | 9% | 5% |
| LU | **31%** | 18% | 12% | 25% | *1%* | 4% | 9% |
| HU | **66%** | 9% | 5% | *0%* | 4% | 9% | 7% |
| MT | 2% | 1% | **15%** | *0%* | 9% | *0%* | 73% |
| NL | **28%** | 12% | 17% | *9%* | 11% | 21% | 2% |
| AT | 26% | 7% | **27%** | *4%* | 10% | 18% | 7% |
| PL | **27%** | 23% | *7%* | 9% | 10% | 14% | 10% |
| PT | **35%** | 32% | 3% | *1%* | 3% | 14% | 12% |
| RO | **29%** | 15% | 7% | 2% | *0%* | 24% | 23% |
| SI | **23%** | 15% | 10% | 16% | *8%* | 20% | 8% |
| SK | **26%** | 18% | 15% | 4% | *3%* | 22% | 12% |
| FI | **28%** | 15% | 19% | 8% | *4%* | 19% | 7% |
| SE | 15% | 16% | **24%** | 18% | *7%* | 9% | 11% |
| UK | **33%** | 15% | 11% | *3%* | 6% | 23% | 10% |
| HR | 50% | 12% | 0% | 5% | 1% | 26% | 6% |
| TR | 34% | 28% | 17% | 3% | 0% | 11% | 8% |
| MK | 31% | 27% | 15% | 0% | 10% | 15% | 2% |
| IS | 36% | 11% | 21% | 4% | 4% | 8% | 16% |
| ME | 76% | 7% | 8% | 0% | 0% | 5% | 5% |
| NO | 30% | 8% | 16% | 15% | 4% | 17% | 9% |
| RS | 12% | 24% | 14% | 21% | 4% | 21% | 4% |
| AL | 59% | 2% | 2% | 34% | 1% | 0% | 2% |
| LI | 29% | 19% | 10% | 0% | 7% | 29% | 7% |
| IL | 26% | 13% | 7% | 5% | 4% | 15% | 30% |
| US | 44% | 15% | 13% | 3% | 3% | 16% | 7% |

| **Highest percentage per country** | *Lowest percentage per country* |
|---|---|
| Highest percentage per item | Lowest percentage per item |

***- 3 SMEs in 5 have been selling green products or services for more than 3 years -***




Base: SMEs answered 'offers green products or services' in Q19

**Most SMEs in the EU selling green products and services have done so for more than three years (61%).** 29% report they have entered green markets between one and three years ago. 8% of SMEs in the EU have been selling green products and services for the last 12 months.

Somewhat more SMEs in EU15 countries than in the NMS12 have been selling green products and services for more than three years (61% vs. 59% in NMS12) or for one to three years (29% vs. 27%). Conversely, SMEs located in the more recent Member States are more likely to have been selling green products or services for the last 12 months (11% vs. 8% in EU15).

It appears that offering green products or services is a newer phenomenon for SMEs in the US than for SMEs in the EU27. 17% of SMEs in the US have been offering green products or services for the past 12 months while the figure is only 8% in the European Union. Conversely, SMEs in the EU are more likely to have been offering green products or services for one to three years (29% vs. 25% in the US) or more than three years (61% vs. 52%).

Company profiles correlate with the length of time for which they have been selling green products or services:

- SMEs are more likely to have been selling green products or services for more than three years than large companies (61% vs. 55%). Furthermore, most SMEs that sell green products or services have done so for more than three years (60%-70%).
- Large companies (42%) are considerably more likely than SMEs (29%) to report they have been selling green products and services for one to three years.
- SMEs active in manufacturing (68%) or retail (67%) are the most likely to say that they have been selling green products or services for more than three years, while SMEs operating in services (31%) or industry (33%) are more likely to have been selling green products or services for 1-3 years.

Q23 For how long have your company been selling green products or services?

| | For the last 12 months | 1 - 3 years | More than 3 years | DK/NA |
|---|---|---|---|---|
| EU27 | 8% | 29% | 61% | 2% |
| **Company size** | | | | |
| 01-09 | 8% | 30% | 60% | 2% |
| 10-49 | 10% | 27% | 60% | 3% |
| 50-249 | 6% | 22% | 70% | 2% |
| **Sectors grouped (NACE)** | | | | |
| Manufacturing (C) | 5% | 25% | 68% | 2% |
| Retail (G) | 7% | 25% | 67% | 1% |
| Services (I/J/K/H/L/M) | 13% | 31% | 52% | 4% |
| Industry (B/D/E/F) | 7% | 33% | 59% | 1% |

At national level, varied results can be observed:

- In all Member States except Cyprus, a majority of SMEs that sell green products or services have been doing so for more than three years. This is particularly the case in Denmark (78%), Slovakia (77%) and Ireland (74%). Outside the EU, high figures are recorded in Norway (79%) and Iceland (76%). 53% of Cypriot SMEs report they have been selling green products and services for one to three years.
- SMEs in Hungary (31%), Romania (29%) and Lithuania (23%) are the most likely to have offered green products or services for the last 12 months. Relatively high figures are also seen for Turkey (16%) and the US (17%).

Q23 For how long have your company been selling green products or services?

| | For the last 12 months | 1 - 3 years | More than 3 years | Don't know |
|---|---|---|---|---|
| EU27 | 8% | 29% | 61% | 2% |
| BE | *8%* | 27% | **61%** | 4% |
| BG | *11%* | 35% | **54%** | 0% |
| CZ | *3%* | 27% | **70%** | 0% |
| DK | *7%* | 13% | **78%** | 2% |
| DE | *14%* | 31% | **54%** | 1% |
| EE | *17%* | 29% | **54%** | 0% |
| IE | *2%* | 21% | **74%** | 3% |
| EL | *7%* | 36% | **57%** | 0% |
| ES | *10%* | 31% | **59%** | 0% |
| FR | *8%* | 38% | **54%** | 0% |
| IT | *2%* | 25% | **71%** | 2% |
| CY | *1%* | **53%** | 46% | 0% |
| LV | *5%* | 25% | **63%** | 7% |
| LT | *23%* | 34% | **43%** | 0% |
| LU | *16%* | 35% | **48%** | 1% |
| HU | 31% | *26%* | **42%** | 1% |
| MT | *9%* | 17% | **67%** | 7% |
| NL | *10%* | 24% | **63%** | 3% |
| AT | *18%* | 28% | **53%** | 1% |
| PL | *9%* | 26% | **61%** | 4% |
| PT | *10%* | 37% | **48%** | 5% |
| RO | 29% | *26%* | **45%** | 0% |
| SI | *9%* | 26% | **57%** | 8% |
| SK | *5%* | 16% | **77%** | 2% |
| FI | *7%* | 23% | **70%** | 0% |
| SE | *13%* | 34% | **50%** | 3% |
| UK | *5%* | 20% | **70%** | 5% |
| HR | 13% | 18% | 63% | 6% |
| TR | 16% | 32% | 50% | 2% |
| MK | 12% | 55% | 32% | 1% |
| IS | 7% | 14% | 76% | 3% |
| ME | 12% | 43% | 39% | 6% |
| NO | 3% | 18% | 79% | 0% |
| RS | 3% | 23% | 74% | 0% |
| AL | 2% | 69% | 29% | 0% |
| LI | 14% | 29% | 57% | 0% |
| IL | 15% | 24% | 57% | 4% |
| US | 17% | 25% | 52% | 6% |

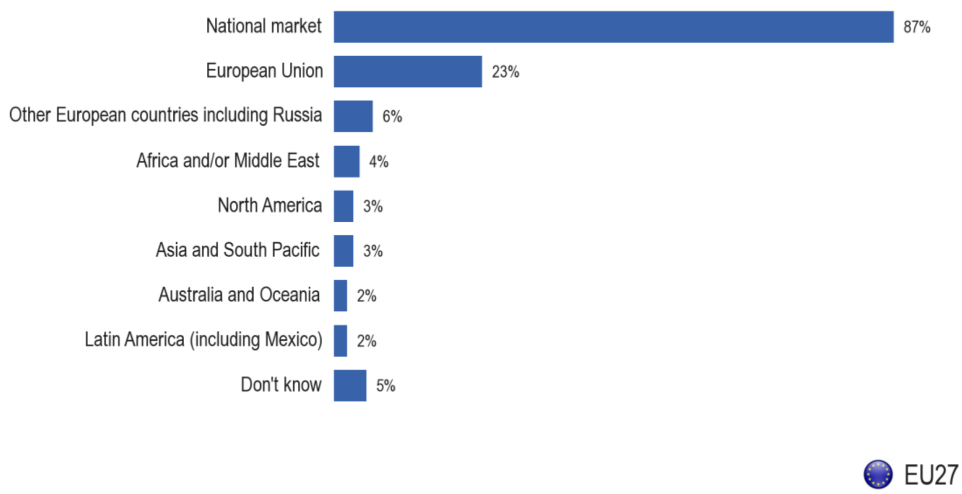
**Highest percentage per country** *Lowest percentage per country*

Highest percentage per item | Lowest percentage per item

### *2.1.2 Where do SMEs currently sell green products and services?*

***– SMEs currently sell green products or services mainly on the national market –***

Q26. Where does your company currently sell green products or services?




Base: SMEs answered 'offers green products or services' in Q19

**87% of SMEs in the EU that sell green products or services do so on the national market**. In second place, just under a quarter of SMEs report that they operate in the European Union (23%). Very few SMEs in the EU extend their green catalogue of products or services to countries outside the EU.

SMEs in the US are the most likely to extend their sales area to the whole of North America (79%) but it is rare for SMEs in the US to sell green products or services beyond the continent.

Large companies are considerably more likely to sell green products or services in several geographical areas than SMEs. Furthermore, medium-sized companies are more likely to sell green products or services beyond the national market than small and micro companies. Micro and small enterprises mainly operate in national markets and to a certain extent in the EU's internal market.

**Q26 Where does your company currently sell green products or services?**

| | National market | European Union | Other European countries including Russia | North America | Latin America (including Mexico) | Africa and/or Middle East | Asia and South Pacific | Australia and Oceania | DK/NA |
|---|---|---|---|---|---|---|---|---|---|
| EU27 | 87% | 23% | 6% | 3% | 2% | 4% | 3% | 2% | 5% |
| **Company size** | | | | | | | | | |
| 01-09 | 88% | 19% | 4% | 2% | 2% | 3% | 2% | 1% | 6% |
| 10-49 | 84% | 34% | 7% | 5% | 2% | 4% | 5% | 2% | 2% |
| 50-249 | 81% | 45% | 23% | 14% | 11% | 18% | 13% | 9% | 4% |

The following findings emerge from the national data:

- In every EU Member State but one, an overwhelming majority of SMEs offering green products or services operate in national markets. Virtually all SMEs do so in the Czech Republic (99%), Spain (98%), Portugal (97%) and Ireland (96%). High figures for selling green products or services in the national market are also recorded in Montenegro (100%), Albania (100%) and Iceland (97%)
- 50% of Hungarian SMEs that sell green products and services report that they operate within the European Union while 41% are active in the national market. 44% of SMEs in Finland and 43% of SMEs in the Netherlands also sell green products or services within the EU.
- SMEs in the Netherlands are the most likely to sell green products or services in several continents: 21% in other European countries including Russia, 15% in Asia and South Pacific, 14% in North America, 12% in Latin America and 11% in Australia and Oceania.

Q26 Where does your company currently sell green products or services?

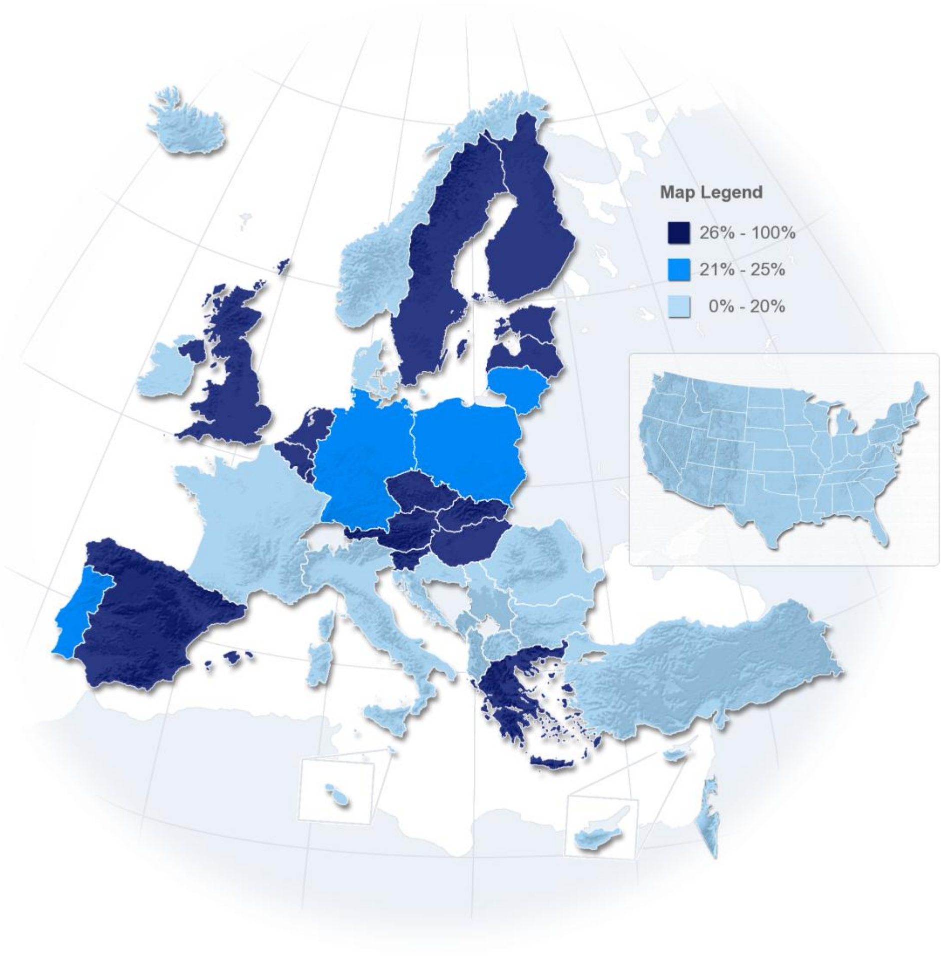
| | National market | European Union | Other European countries including Russia | North America | Latin America (including Mexico) | Africa and/or Middle East | Asia and South Pacific | Australia and Oceania | Don't know |
|---|---|---|---|---|---|---|---|---|---|
| EU27 | 87% | 23% | 6% | 3% | 2% | 4% | 3% | 2% | 5% |
| BE | **89%** | 31% | 5% | 4% | 7% | 7% | 4% | 0% | 0% |
| BG | **90%** | 7% | 9% | 0% | 0% | 0% | 2% | 0% | 0% |
| CZ | **99%** | 26% | 14% | 5% | 2% | 3% | 8% | 3% | 0% |
| DK | **92%** | 20% | 7% | 3% | 1% | 1% | 4% | 2% | 2% |
| DE | **82%** | 25% | 7% | 4% | 3% | 5% | 3% | 2% | 3% |
| EE | **92%** | 38% | 10% | 2% | 0% | 0% | 0% | 0% | 0% |
| IE | **96%** | 12% | 2% | 5% | 1% | 2% | 6% | 1% | 2% |
| EL | **86%** | 37% | 6% | 4% | 5% | 6% | 5% | 3% | 3% |
| ES | **98%** | 28% | 4% | 6% | 6% | 3% | 3% | 0% | 2% |
| FR | **85%** | 11% | 3% | 1% | 0% | 3% | 0% | 0% | 10% |
| IT | **87%** | 11% | 1% | 0% | 0% | 0% | 0% | 0% | 6% |
| CY | **88%** | 13% | 10% | 0% | 0% | 0% | 0% | 0% | 10% |
| LV | **89%** | 26% | 12% | 4% | 8% | 5% | 5% | 4% | 1% |
| LT | **93%** | 24% | 15% | 3% | 3% | 0% | 3% | 3% | 0% |
| LU | **90%** | 34% | 6% | 7% | 1% | 1% | 1% | 1% | 0% |
| HU | 41% | **50%** | 0% | 0% | 0% | 0% | 0% | 0% | 9% |
| MT | **91%** | 20% | 9% | 9% | 9% | 9% | 9% | 9% | 8% |
| NL | **69%** | 43% | 21% | 14% | 12% | 17% | 15% | 11% | 10% |
| AT | **84%** | 38% | 10% | 1% | 1% | 3% | 5% | 1% | 0% |
| PL | **94%** | 24% | 4% | 0% | 0% | 0% | 0% | 0% | 1% |
| PT | **97%** | 23% | 7% | 3% | 4% | 24% | 2% | 2% | 1% |
| RO | **93%** | 20% | 7% | 0% | 0% | 0% | 0% | 0% | 0% |
| SI | **67%** | 37% | 13% | 3% | 6% | 3% | 3% | 3% | 6% |
| SK | **88%** | 33% | 7% | 5% | 5% | 3% | 4% | 4% | 0% |
| FI | **76%** | 44% | 9% | 5% | 3% | 2% | 4% | 2% | 0% |
| SE | **70%** | 26% | 7% | 1% | 1% | 1% | 1% | 1% | 8% |
| UK | **81%** | 30% | 12% | 9% | 4% | 9% | 4% | 5% | 11% |
| HR | 89% | 11% | 26% | 1% | 1% | 1% | 1% | 0% | 6% |
| TR | 49% | 19% | 3% | 1% | 0% | 3% | 2% | 0% | 35% |
| MK | 93% | 5% | 1% | 0% | 0% | 0% | 0% | 0% | 3% |
| IS | 97% | 7% | 7% | 4% | 1% | 1% | 4% | 1% | 1% |
| ME | 100% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| NO | 93% | 14% | 8% | 4% | 2% | 2% | 5% | 3% | 0% |
| RS | 88% | 20% | 17% | 8% | 0% | 8% | 8% | 0% | 0% |
| AL | 100% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| LI | 72% | 65% | 20% | 10% | 5% | 10% | 5% | 5% | 0% |
| IL | 92% | 7% | 5% | 5% | 3% | 4% | 1% | 3% | 5% |
| US | 16% | 2% | 2% | 79% | 3% | 2% | 2% | 2% | 15% |

| **Highest percentage per country** | *Lowest percentage per country* |
|---|---|
| Highest percentage per item | Lowest percentage per item |

| | |
|---|---|
| HU | 50% |
| FI | 44% |
| NL | 43% |
| AT | 38% |
| EE | 38% |
| EL | 37% |
| SI | 37% |
| LU | 34% |
| SK | 33% |
| BE | 31% |
| UK | 30% |
| ES | 28% |
| SE | 26% |
| CZ | 26% |
| LV | 26% |
| DE | 25% |
| PL | 24% |
| LT | 24% |
| PT | 23% |
| EU | 23% |
| RO | 20% |
| DK | 20% |
| MT | 20% |
| CY | 13% |
| IE | 12% |
| IT | 11% |
| FR | 11% |
| BG | 7% |
| TR | 19% |
| HR | 11% |
| IS | 7% |
| MK | 5% |
| ME | 0% |
| LI | 65% |
| RS | 20% |
| NO | 14% |
| IL | 7% |
| US | 2% |
| AL | 0% |

Question: Q26. Where does your company currently sell green products or services?

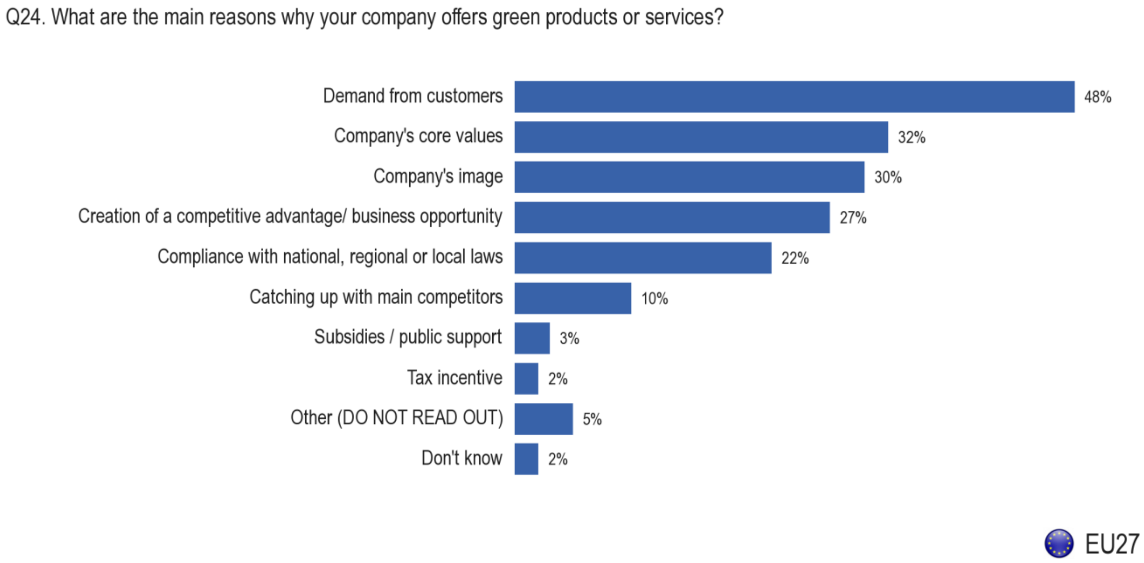
Answers: European Union



## 2.2 What makes SMEs offer green products or services?

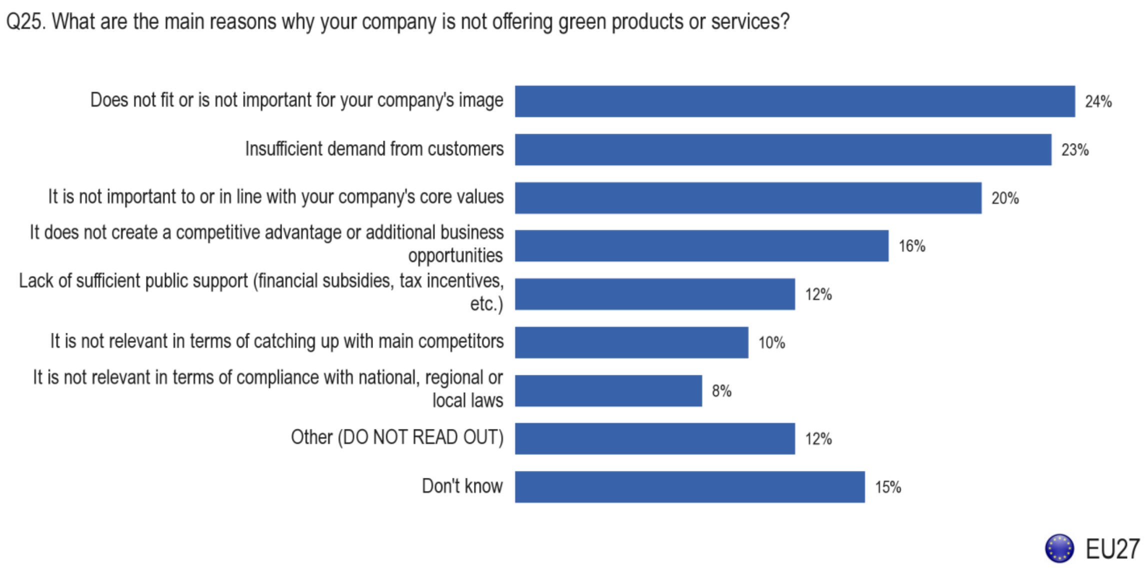
***- Demand from customers plays a major role -***

SMEs that are currently offering green products and services were asked what are their main reasons for doing so. At the same time, SMEs that do not sell green products or services were asked to indicate the main reasons for not doing so.




Base: SMEs answered 'offers green products or services' in Q19

The main reason for SMEs in the EU to sell green products or services is customer demand (48%). In second place, SMEs values (32%) and image (30%) also play a role. Relatively high proportions of SMEs also mention the creation of a competitive advantage/business opportunity (27%) and compliance with legislation (22%).




Base: SMEs answered 'not offering green products or services' in Q19

In parallel, the main reasons given by SMEs in the EU for *not* offering green products or services are that this does not fit or is not important for the company's image (24%), insufficient customer demand (23%) and the fact that it is not important for the company's core values (20%).

Some differences can be identified based on the company's location and profile:

- SMEs in the EU15 countries are considerably more likely to mention values (34% vs. 23% in NMS12) and image (31% vs. 23%) as main reasons for offering green products or services than SMEs in the NMS12. SMEs located in the NMS12 countries are significantly more likely to cite the lack of public support as the main reasons for *not* offering green products or services (17% vs. 11%).
- SMEs in the US are more likely to cite each of these reasons for selling green products or services, with the exception of the company's image, which is more likely to be mentioned by SMEs located in the EU (30% vs. 23% in the US). SMEs in the US are more likely to say that they do *not* sell green products or services because it is not relevant in terms of catching up with competitors (21% vs. 10% in EU27) or in terms of compliance with legislation (20% vs. 8%).
- Large companies are considerably more likely to mention company's image (51% vs. 30%) and creation of a competitive advantage/business opportunity (43% vs. 27%) as reasons for selling green products or services than SMEs. In turn, SMEs cite slightly more frequently compliance with national, regional or local laws (22% vs. 16%) and catching up with main competitors (10% vs. 5%).
- When it comes to reasons for *not* selling green products or services, SMEs are significantly more likely to cite than large companies that this does not fit or is not important for the company's image (24% vs. 9%) and the lack of sufficient public support (12% vs. 5%) while large companies tend to more frequently mention that selling green products or services is not important to or in line with the company's core values (27% vs. 20%).

Q25 What are the main reasons why your company is not offering green products or services?

| | Does not fit or is not important for your company's image | Insufficient demand from customers | It is not important to or in line with your company's core values | It does not create a competitive advantage or additional business opportunities | Lack of sufficient public support (financial subsidies, tax incentives, etc.) | It is not relevant in terms of catching up with main competitors | It is not relevant in terms of compliance with national, regional or local laws | Other (DO NOT READ OUT) | DK/NA |
|---|---|---|---|---|---|---|---|---|---|
| EU27 | 24% | 23% | 20% | 16% | 12% | 10% | 8% | 12% | 15% |
| **Company size** | | | | | | | | | |
| 01-09 | 24% | 22% | 20% | 16% | 12% | 9% | 8% | 13% | 15% |
| 10-49 | 23% | 27% | 20% | 17% | 13% | 13% | 9% | 10% | 13% |
| 50-249 | 21% | 29% | 19% | 19% | 6% | 18% | 14% | 11% | 11% |
| **Sectors grouped (NACE)** | | | | | | | | | |
| Manufacturing (C) | 20% | 25% | 16% | 19% | 10% | 11% | 10% | 11% | 17% |
| Retail (G) | 23% | 23% | 19% | 15% | 14% | 10% | 7% | 14% | 15% |
| Services (I/J/K/H/L/M) | 27% | 20% | 22% | 16% | 10% | 10% | 9% | 12% | 16% |
| Industry (B/D/E/F) | 21% | 26% | 22% | 16% | 13% | 12% | 9% | 11% | 11% |

At national level, the reasons given by SMEs for offering green products and services are as follows:

- In 22 Member States, the largest segment of SMEs mentions **customer demand** as one of the main reasons for selling green products or services. Czech (71%), Danish (67%) and German (65%) SMEs are the most likely to cite this reason. Relatively high figures are also recorded in Turkey (68%) and the US (56%).
- In second place, the largest segment of SMEs in France (46%), Spain (39%) and Cyprus (37%) cite company’s core value as a reason for selling green products or services. The highest figure overall is seen in Albania (63%).
- In Luxembourg (46%) and Portugal (39%) SMEs are the most likely to mention their image among the main reasons for selling green products and services.

**Q24 What are the main reasons why your company offers green products or services?**

| | Demand from customers | Company's core values | Company's image | Creation of a competitive advantage/ business opportunity | Compliance with national, regional or local laws | Catching up with main competitors | Subsidies / public support | Tax incentive | Other (DO NOT READ OUT) | Don't know |
|---|---|---|---|---|---|---|---|---|---|---|
| EU27 | 48% | 32% | 30% | 27% | 22% | 10% | 3% | 2% | 5% | 2% |
| BE | **48%** | 31% | 28% | 27% | 15% | 9% | 4% | *2%* | 12% | 0% |
| BG | **45%** | 33% | 29% | 15% | 6% | *2%* | 4% | 4% | 7% | 0% |
| CZ | **71%** | 33% | 24% | 32% | 7% | 15% | 1% | *0%* | 6% | 3% |
| DK | **67%** | 20% | 24% | 39% | 14% | 11% | 5% | *0%* | 5% | 0% |
| DE | **65%** | 26% | 28% | 29% | 18% | 7% | 6% | *1%* | 0% | 2% |
| EE | **58%** | 45% | 24% | 31% | 6% | 6% | *1%* | *1%* | 16% | 0% |
| IE | **50%** | 31% | 13% | 13% | 16% | 4% | 3% | *2%* | 6% | 2% |
| EL | **40%** | 32% | 29% | 34% | 21% | 11% | *1%* | 2% | 5% | 0% |
| ES | 34% | **39%** | 32% | 35% | 28% | 16% | 2% | *0%* | 7% | 0% |
| FR | 43% | **46%** | 43% | 19% | 31% | 4% | 4% | *3%* | 3% | 2% |
| IT | **43%** | 27% | 26% | 27% | 25% | 12% | *1%* | *1%* | 6% | 1% |
| CY | 32% | **37%** | 33% | 23% | 12% | 9% | 1% | *0%* | 1% | 10% |
| LV | **52%** | 43% | 22% | 26% | 14% | 1% | *0%* | 2% | 7% | 1% |
| LT | **60%** | 13% | 19% | 16% | 5% | 4% | *0%* | 2% | 2% | 2% |
| LU | 43% | 40% | **46%** | 13% | 16% | 8% | *3%* | *3%* | 0% | 0% |
| HU | **36%** | 21% | 26% | 30% | 20% | 20% | *0%* | 4% | 5% | 5% |
| MT | **45%** | 3% | 21% | 10% | 18% | 4% | *0%* | 4% | 7% | 7% |
| NL | **38%** | 37% | 28% | 37% | 10% | 8% | *3%* | *3%* | 11% | 4% |
| AT | **49%** | 34% | 35% | 4% | 14% | *0%* | 5% | 2% | 11% | 2% |
| PL | **50%** | 19% | 21% | 19% | 21% | 20% | *3%* | *3%* | 2% | 1% |
| PT | 36% | 33% | **39%** | 31% | 34% | 13% | *3%* | 5% | 2% | 0% |
| RO | **61%** | 12% | 25% | 30% | 20% | 1% | *0%* | 5% | 0% | 0% |
| SI | **42%** | 15% | 21% | 34% | 11% | 15% | 10% | *4%* | 10% | 3% |
| SK | **58%** | 43% | 21% | 18% | 12% | 11% | 3% | *1%* | 3% | 2% |
| FI | **62%** | 46% | 41% | 46% | 26% | 7% | *0%* | *0%* | 3% | 2% |
| SE | **53%** | 44% | 23% | 21% | 9% | *3%* | *3%* | *3%* | 11% | 4% |
| UK | **60%** | 36% | 35% | 30% | 23% | 12% | 4% | *3%* | 3% | 5% |
| HR | 26% | 29% | 13% | 31% | 6% | 7% | 0% | 0% | 16% | 6% |
| TR | 68% | 33% | 29% | 15% | 5% | 8% | 8% | 1% | 0% | 0% |
| MK | 37% | 16% | 29% | 31% | 15% | 20% | 0% | 10% | 0% | 1% |
| IS | 35% | 16% | 38% | 33% | 9% | 22% | 7% | 0% | 1% | 4% |
| ME | 43% | 9% | 62% | 4% | 11% | 16% | 6% | 0% | 0% | 0% |
| NO | 30% | 30% | 41% | 34% | 26% | 12% | 2% | 2% | 7% | 2% |
| RS | 42% | 20% | 33% | 11% | 9% | 2% | 0% | 0% | 13% | 0% |
| AL | 36% | 63% | 29% | 34% | 26% | 36% | 0% | 0% | 0% | 0% |
| LI | 47% | 32% | 44% | 27% | 4% | 0% | 22% | 0% | 5% | 0% |
| IL | 21% | 22% | 23% | 24% | 14% | 7% | 1% | 5% | 10% | 2% |
| US | 56% | 43% | 23% | 36% | 28% | 9% | 6% | 10% | 0% | 0% |

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

Highest percentage per item Lowest percentage per item

The following findings emerge at national level regarding reasons for *not* selling green goods or services:

- In 12 Member States, the most likely reason for not selling green goods and services is that this **does not fit or is not important for the company's image**. This is particularly the case in Portugal (55%) and Hungary (43%). Outside the EU, high figures are seen for Montenegro (53%) and Serbia (42%).
- In six Member States, the largest segment of SMEs name **insufficient customer demand** among the main reasons for not offering green products or services. The highest proportion, just under a third, of SMEs in France (32%) and the UK (31%) and Slovakia (31%) belong to this group. A high figure is also recorded for Finland (31%). This is also the reason most likely to be mentioned in Turkey (38%), FYROM (29%) and the US (28%).
- In Estonia (33%), Germany (32%), Romania (29%), Belgium (27%) and Latvia (27%) the most cited reason is that offering green products or services is not important to or in line with the company's core values. Finally, the highest proportion of SMEs in Finland (38%) mention among their reasons for not selling such products or services. The fact that offering green products or services does not create a competitive advantage for the company.

Q25 What are the main reasons why your company is not offering green products or services?

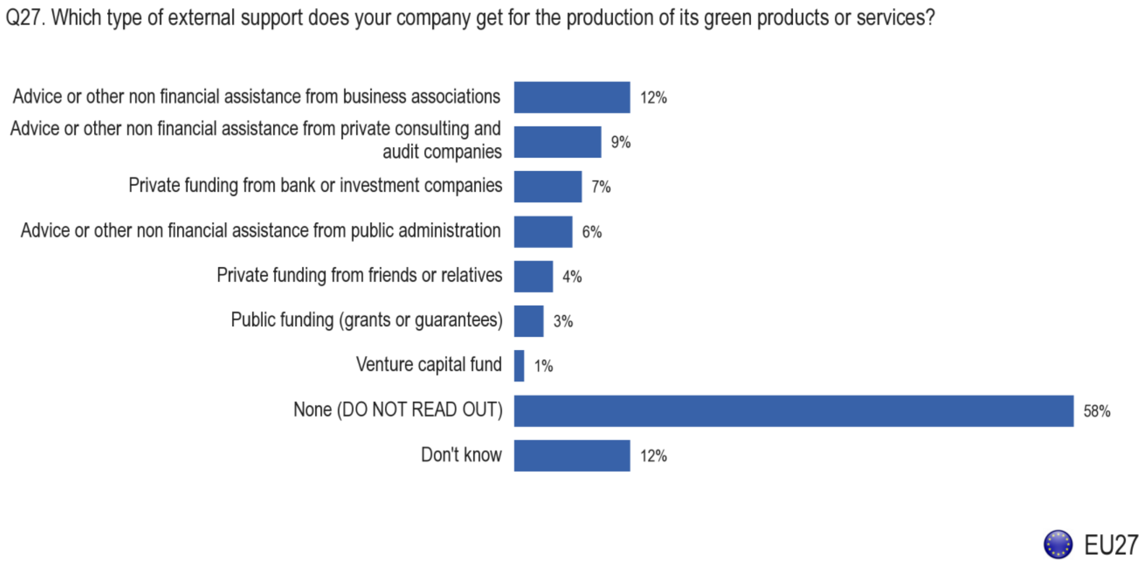
| | Insufficient demand from customers | Does not fit or is not important for your company's image | Lack of sufficient public support (financial subsidies, tax incentives, etc.) | It is not important to or in line with your company's core values | It does not create a competitive advantage or additional business opportunities | It is not relevant in terms of catching up with main competitors | It is not relevant in terms of compliance with national, regional or local laws | Other (DO NOT READ OUT) | Don't know |
|---|---|---|---|---|---|---|---|---|---|
| EU27 | 23% | 24% | 12% | 20% | 16% | 10% | 8% | 12% | 15% |
| BE | 20% | 22% | 11% | 27% | 14% | 10% | 11% | 11% | 10% |
| BG | 16% | 18% | 9% | 15% | 13% | 10% | 5% | 19% | 11% |
| CZ | 19% | 6% | 21% | 17% | 13% | 9% | 4% | 10% | 36% |
| DK | 16% | 22% | 2% | 12% | 15% | 26% | 7% | 26% | 11% |
| DE | 26% | 11% | 6% | 32% | 20% | 14% | 15% | 12% | 12% |
| EE | 15% | 33% | 4% | 33% | 10% | 2% | 3% | 26% | 6% |
| IE | 8% | 11% | 5% | 5% | 3% | 13% | 11% | 6% | 52% |
| EL | 20% | 37% | 15% | 20% | 9% | 6% | 7% | 14% | 9% |
| ES | 25% | 29% | 13% | 17% | 13% | 14% | 12% | 7% | 15% |
| FR | 32% | 21% | 24% | 21% | 17% | 6% | 4% | 17% | 11% |
| IT | 14% | 22% | 2% | 22% | 15% | 4% | 6% | 18% | 16% |
| CY | 9% | 33% | 13% | 14% | 10% | 13% | 11% | 12% | 15% |
| LV | 16% | 24% | 14% | 27% | 22% | 8% | 4% | 18% | 8% |
| LT | 14% | 19% | 7% | 19% | 13% | 7% | 6% | 31% | 12% |
| LU | 27% | 28% | 1% | 21% | 16% | 15% | 9% | 11% | 12% |
| HU | 19% | 43% | 9% | 26% | 16% | 10% | 7% | 11% | 6% |
| MT | 4% | 10% | 2% | 7% | 10% | 19% | 9% | 41% | 10% |
| NL | 27% | 19% | 6% | 26% | 20% | 14% | 16% | 18% | 11% |
| AT | 25% | 29% | 5% | 26% | 15% | 9% | 4% | 15% | 15% |
| PL | 26% | 22% | 23% | 23% | 23% | 9% | 6% | 5% | 13% |
| PT | 14% | 55% | 18% | 14% | 18% | 9% | 5% | 9% | 5% |
| RO | 20% | 24% | 19% | 29% | 9% | 9% | 2% | 9% | 12% |
| SI | 17% | 35% | 6% | 21% | 10% | 9% | 5% | 17% | 6% |
| SK | 31% | 10% | 16% | 18% | 26% | 17% | 11% | 12% | 16% |
| FI | 31% | 7% | 7% | 8% | 38% | 18% | 10% | 13% | 20% |
| SE | 29% | 22% | 2% | 3% | 11% | 10% | 8% | 13% | 21% |
| UK | 31% | 24% | 13% | 12% | 19% | 23% | 18% | 3% | 21% |
| HR | 13% | 29% | 10% | 17% | 4% | 10% | 2% | 29% | 6% |
| TR | 38% | 27% | 25% | 30% | 18% | 5% | 6% | 6% | 9% |
| MK | 29% | 24% | 16% | 18% | 0% | 5% | 2% | 14% | 11% |
| IS | 23% | 28% | 13% | 8% | 15% | 6% | 2% | 9% | 27% |
| ME | 6% | 53% | 5% | 25% | 2% | 0% | 0% | 7% | 6% |
| NO | 28% | 19% | 10% | 12% | 19% | 20% | 12% | 23% | 16% |
| RS | 19% | 42% | 7% | 26% | 0% | 0% | 0% | 13% | 6% |
| AL | 27% | 40% | 15% | 21% | 7% | 22% | 1% | 3% | 9% |
| LI | 27% | 8% | 5% | 25% | 3% | 8% | 7% | 16% | 37% |
| IL | 22% | 21% | 5% | 13% | 8% | 10% | 8% | 25% | 12% |
| US | 28% | 22% | 15% | 10% | 25% | 21% | 20% | 4% | 23% |

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

Highest percentage per item | Lowest percentage per item

## 2.3 Can policy help SMEs to offer green products or services?

***- Relatively few SMEs receive external support for the production of their green products or services -***




Base: SMEs answered 'offers green products or services' in Q19

**30% of SMEs in the EU report that they receive external support for the production of green products or services.** For 26% of SMEs this support comes from the private sector while 8% receive assistance from the public sector. SMEs are most likely to receive advice or non-financial assistance from business associations (12%), from private consulting and auditing firms (9%) or from public administration (6%). 7% receive private funding from bank or investment SMEs.

SMEs located in the EU15 countries are slightly more likely to receive external support than SMEs in the NMS12 (30% vs. 28%), particularly advice or other non- financial assistance from business associations (13% vs. 7%) and advice or other non-financial assistance from private consulting and audit companies (10% vs. 5%).

Similar proportions of SMEs in the EU and in the US receive external support for the production of green products and services. SMEs in the US are however more likely to report that they receive private funding from friends and relatives (13% vs. 4% in the EU) while SMEs in the EU are more likely to receive advice or other non-financial assistance from business associations (12% vs. 5% in the US) and funding from banks or investment companies (7% vs. 1%).

Large companies are considerably more likely than SMEs to receive external support for the production of its green products or services (44% vs. 30%). This is the case for funding from the private sector (40% vs. 26%), particularly private funding from bank or investment companies (19% vs. 7%) and advice or other non financial assistance from private consulting and audit companies (18% vs. 9%).

Medium-sized (44%) are more likely than small (30%) and micro (28%) companies to receive external support for the production of green products and services. This is also the case for SMEs in industry (40%) in comparison with SMEs operating in another sector (25%-31%).

Q27 Which type of external support does your company get for the production of its green products or services? (MULTIPLE ANSWERS POSSIBLE)

| | Advice or other non financial assistance from business associations | Advice or other non financial assistance from private consulting and audit companies | Private funding from bank or investment companies | Advice or other non financial assistance from public administration | Private funding from friends or relatives | Public funding (grants or guarantees) | Venture capital fund | None (DO NOT READ OUT) | DK/NA |
|---|---|---|---|---|---|---|---|---|---|
| EU27 | 12% | 9% | 7% | 6% | 4% | 3% | 1% | 58% | 12% |
| **Company size** | | | | | | | | | |
| 01-09 | 11% | 9% | 7% | 5% | 4% | 3% | 1% | 60% | 12% |
| 10-49 | 13% | 9% | 6% | 6% | 4% | 5% | 1% | 56% | 14% |
| 50-249 | 22% | 16% | 12% | 15% | 2% | 7% | 1% | 47% | 9% |
| **Sectors grouped (NACE)** | | | | | | | | | |
| Manufacturing (C) | 10% | 8% | 8% | 4% | 6% | 4% | 1% | 60% | 9% |
| Retail (G) | 11% | 7% | 6% | 4% | 4% | 2% | 1% | 61% | 13% |
| Services (I/J/K/H/L/M) | 11% | 9% | 6% | 7% | 4% | 3% | 1% | 62% | 13% |
| Industry (B/D/E/F) | 15% | 13% | 9% | 9% | 3% | 5% | 1% | 49% | 11% |

At national level the following can be observed:

- A third or more SMEs that sell green products or services receive external support in Bulgaria (48%), Greece (41%), Portugal (38%), Spain (36%), Finland (36%), Latvia (35%), the UK (35%) and Belgium (34%).
- Around one SME in 10 or fewer receives external support in Malta (11%), Ireland (11%) and Estonia (6%).
- In most EU countries (24), SMEs are more likely to receive assistance from the private sector than from the public sector. The exceptions are Luxembourg, Ireland and Estonia, where assistance is slightly more likely to be obtained from the public sector than from the private sector.
- Advice or other non-financial assistance from business associations is the most common type of support in 10 Member States, particularly in the UK (29%) and Portugal (20%).

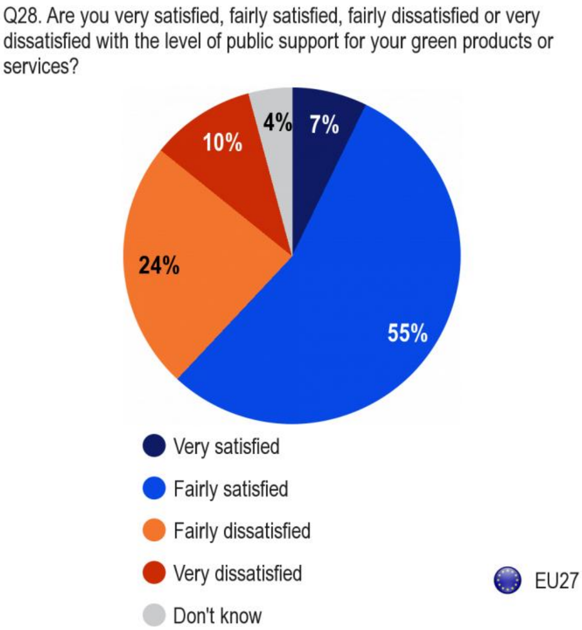
**Q27 Which type of external support does your company get for the production of its green products or services?**

| | Advice or other non financial assistance from business associations | Advice or other non financial assistance from private consulting and audit companies | Private funding from bank or investment companies | Advice or other non financial assistance from public administration | Private funding from friends or relatives | Public funding (grants or guarantees) | Venture capital fund | None (DO NOT READ OUT) | Don't know |
|---|---|---|---|---|---|---|---|---|---|
| EU27 | 12% | 9% | 7% | 6% | 4% | 3% | 1% | 58% | 12% |
| BE | 13% | **18%** | 8% | 7% | 1% | 3% | 2% | 54% | 12% |
| BG | 6% | 7% | **26%** | 1% | 10% | 5% | 0% | 51% | 1% |
| CZ | **12%** | 6% | 3% | 3% | 5% | 3% | 0% | 67% | 9% |
| DK | **8%** | 4% | 4% | 0% | 2% | 6% | 0% | 74% | 5% |
| DE | **11%** | 8% | 7% | 9% | 3% | 5% | 0% | 65% | 8% |
| EE | 0% | 0% | 0% | 0% | 0% | **6%** | 0% | 87% | 7% |
| IE | 2% | 0% | 2% | 4% | 2% | **5%** | 0% | 72% | 17% |
| EL | 3% | 13% | **14%** | 3% | 12% | 5% | 7% | 59% | 0% |
| ES | 13% | **14%** | 9% | 8% | 6% | 6% | 0% | 59% | 5% |
| FR | **10%** | 3% | 5% | 6% | 2% | 1% | 0% | 62% | 20% |
| IT | 12% | **13%** | 6% | 2% | 0% | 2% | 0% | 60% | 10% |
| CY | 0% | 0% | **11%** | 0% | 0% | 2% | 0% | 67% | 21% |
| LV | **9%** | 7% | 6% | 7% | **9%** | 3% | 0% | 17% | 48% |
| LT | 2% | 1% | 1% | 3% | **9%** | 1% | 0% | 83% | 4% |
| LU | 3% | 3% | 3% | **12%** | 7% | 5% | 0% | 71% | 8% |
| HU | **12%** | 1% | 7% | 7% | 7% | 0% | 4% | 28% | 47% |
| MT | 9% | 1% | 1% | **10%** | 0% | 1% | 0% | 45% | 44% |
| NL | **13%** | 10% | 11% | 12% | 1% | 6% | 4% | 58% | 12% |
| AT | **11%** | 1% | 7% | 6% | 6% | 3% | 1% | 66% | 7% |
| PL | 8% | 6% | 5% | **11%** | 5% | 2% | 1% | 66% | 3% |
| PT | **20%** | 13% | 16% | 0% | 17% | 4% | 0% | 6% | 56% |
| RO | 0% | 1% | 10% | 0% | **15%** | 0% | 0% | 72% | 2% |
| SI | 2% | 3% | 3% | 1% | **4%** | **4%** | 0% | 78% | 5% |
| SK | 6% | 6% | 6% | 3% | **9%** | 3% | 1% | 76% | 1% |
| FI | 11% | 12% | 1% | **18%** | 6% | 5% | 0% | 64% | 0% |
| SE | 7% | 6% | 8% | 6% | **10%** | 0% | 0% | 20% | 53% |
| UK | **29%** | 11% | 5% | 7% | 1% | 5% | 0% | 54% | 11% |
| HR | 0% | 5% | 0% | 0% | 0% | 0% | 0% | 93% | 1% |
| TR | 14% | 2% | 20% | 1% | 11% | 11% | 1% | 39% | 8% |
| MK | 0% | 0% | 18% | 10% | 32% | 1% | 1% | 45% | 3% |
| IS | 6% | 6% | 0% | 1% | 2% | 9% | 1% | 65% | 17% |
| ME | 0% | 11% | 34% | 0% | 5% | 0% | 16% | 40% | 0% |
| NO | 1% | 4% | 5% | 0% | 1% | 5% | 1% | 85% | 2% |
| RS | 0% | 8% | 18% | 0% | 0% | 1% | 1% | 71% | 1% |
| AL | 0% | 25% | 0% | 25% | 0% | 0% | 1% | 73% | 1% |
| LI | 7% | 0% | 5% | 0% | 0% | 7% | 0% | 45% | 37% |
| IL | 4% | 2% | 3% | 0% | 7% | 2% | 0% | 82% | 3% |
| US | 5% | 7% | 1% | 11% | 13% | 7% | 1% | 56% | 14% |

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

Highest percentage per item Lowest percentage per item

### - *Relatively high levels of satisfaction with public support* -




Base: SMEs answered 'get public support for the production of its green products or services' in Q27

Of the SMEs that receive support from the public sector, an absolute majority are satisfied with this assistance (62%), while a third express dissatisfaction (34%). There are no major differences between the results in the EU15 and NMS12.

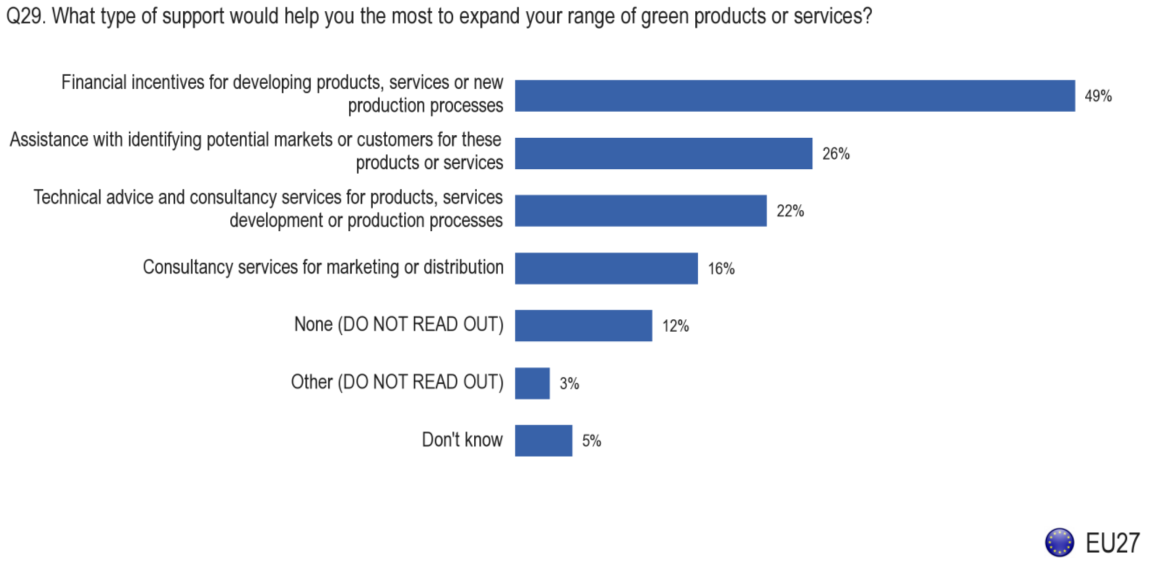
Large companies are slightly more likely to indicate they are satisfied with the level of public support for their green products or services than SMEs (66% vs. 62%). Representatives of small companies are the most likely to express satisfaction (73%) while the lowest figure is recorded for micro companies (58%). SMEs in retail are the most likely of all to report they are satisfied with the level of public support for their green products or services (80%) while SMEs in manufacturing report more moderate levels (45%).

**Q28 Are you very satisfied, fairly satisfied, fairly dissatisfied or very dissatisfied with the level of public support for your green products or services ?**

| | Total 'Satisfied' | Total 'Dissatisfied' | DK/NA |
|---|---|---|---|
| EU27 | 62% | 34% | 4% |
| **Company size** | | | |
| 01-09 | 58% | 37% | 5% |
| 10-49 | 73% | 25% | 2% |
| 50-249 | 63% | 34% | 3% |
| **Sectors grouped (NACE)** | | | |
| Manufacturing (C) | 45% | 50% | 5% |
| Retail (G) | 80% | 9% | 11% |
| Services (I/J/K/H/L/M) | 59% | 40% | 1% |
| Industry (B/D/E/F) | 54% | 43% | 3% |

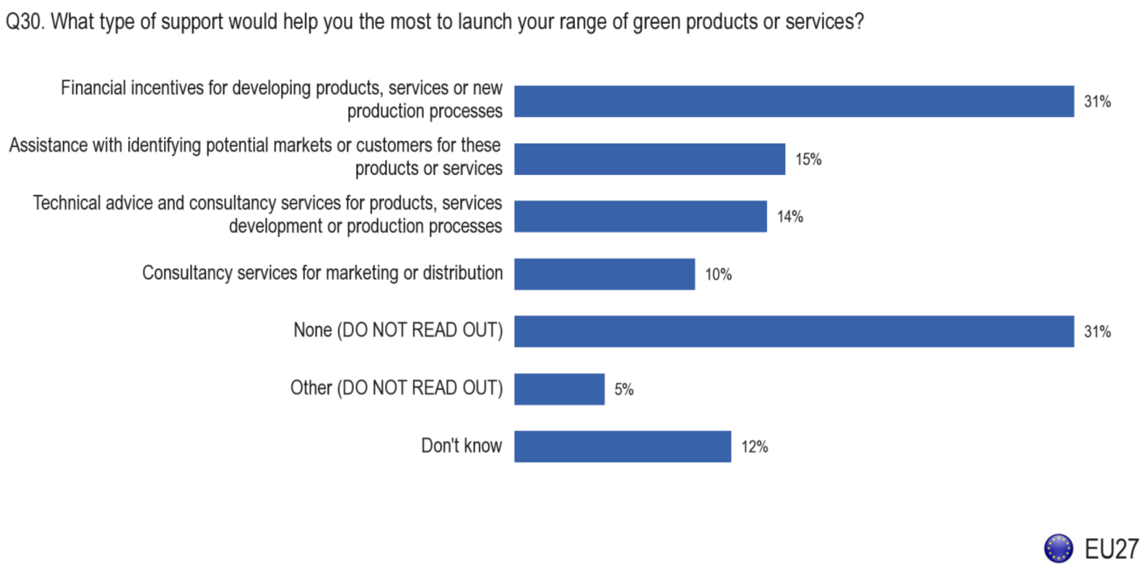
Due to the low base sizes per country, further analysis of the question has not been carried out.

***- Financial incentives are considered the best way to expand SMEs range of green products or services -***




Base: SMEs answered 'offers green products or services' in Q19

Half (49%) of the SMEs that offer green products or services say that financial incentives for developing products, services or new production processes would help them the most to expand their range of green products or services. A quarter (26%) mention assistance with identifying potential markets or customers for these products or services, while 22% mention technical advice and consultancy services for products services development or production processes.




Base: SMEs answered 'not offering green products or services' in Q19

The same types of support emerge at the top of the ranking when SMEs that are not currently selling green product or services were asked to identify the support that would help them the most to launch a range of green products or services. 31% cite financial incentives for developing products services or new production processes, 15% assistance with identifying potential markets or customers for these products or services and 14% technical advice and consultancy services for products, services development or production processes. However, 31% of SMEs not offering green products or services say that none of these types of support would be useful.

Company location does make a difference to the type of most helpful support:

- SMEs located in NMS12 that are already offering green products or services are more likely to say that financial incentives for developing products, services or new production processes (60% vs. 47% in EU15) and consultancy services for marketing and distribution (21% vs. 15%) would help them the most to expand their range of green products or services. Conversely, technical advice and consultancy services for products, services development or production processes are considerably more likely to be mentioned by SMEs in the EU15 (24% vs. 13% in NMS12).
- Similarly, SMEs in the NMS12 which do not yet offer green products or services are significantly more likely to mention financial incentives for developing products, services or new production processes (37% vs. 29% in EU15) and technical advice and consultancy services for products, services development or production processes (20% vs. 12%) as a type of support that would help them the most to launch their range of green products or services.
- SMEs located in the US that are already offering green products or services say that assistance with identifying potential markets or customers for these products or services would help them the most to expand your range of green products or services (54% vs. 26% in EU27). Conversely, SMEs in the EU are more likely to identify financial incentives for developing products, services or new production processes as the type of support that would help them the most to expand their range of green products or services (49% vs. 45% in the US).

- Among SMEs *not* currently offering green products or services, financial incentives for developing products, services or new production processes are somewhat more likely to encourage the launch of green products and services by SMEs in the US than by SMEs in the EU (37% vs. 31% in EU27).

Company's size also makes a difference regarding the preferred type of support among companies already offering green services or products:

- Large companies that are already offering green services or products are considerably more likely than SMEs that are currently offering green services or products to indicate that none of the types of support would help them to expand their range of green products or services (24% vs. 12% for SMEs).

- Assistance with identifying potential markets or customers for these products or services is much more likely to be mentioned among large companies than among SMEs (40% vs. 26%). Conversely, technical advice and consultancy services for products, services development or production processes (22% vs. 13% for large companies) and consultancy services for marketing or distribution (16% vs. 7%) are more likely to be mentioned among SMEs.

Similarly, differences can be observed among those companies that are not currently offering green product or services:

- SMEs that are not yet offering green products or services are somewhat more likely than large companies to indicate that none of the types of help would help them to launch their range of green products or services (31% vs. 25%).

- Large companies that are not currently offering green products or services are considerably more likely to cite financial incentives for developing products, services or new production processes (43% vs. 31% for SMEs) and assistance with identifying potential markets or customers for these products or services (26% vs. 15%) as types of support that would help them the most to launch their range of green products or services.

National findings for SMEs that are already selling green products or services include:

- In 25 Member States, **financial incentives for developing products, services or new production processes** are mentioned as type of support that would help SMEs the most to expand their range of green products or services. The highest proportions are seen in Cyprus (74%), Poland (70%), Slovenia (65%) and Lithuania (65%). High figures are also observed in Albania (97%), Montenegro (82%) and FYROM (79%).
- The largest segment of SMEs in Luxembourg mention **technical advice and consultancy services for products, services development or production processes** as the type of support that would help them the most to expand their range of green products or service (36%).
- **Assistance with identifying potential markets or customers** is mentioned by 40% of SMEs in Spain and the Czech Republic and 38% of SMEs in Portugal. The highest figure overall is observed in the US (54%).

Q29 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 for these products or services | Technical advice and consultancy services for products, services development or production processes | Consultancy services for marketing or distribution | None (DO NOT READ OUT) | Other (DO NOT READ OUT) | Don't know |
|---|---|---|---|---|---|---|---|
| EU27 | 49% | 26% | 22% | 16% | 12% | 3% | 5% |
| BE | **32%** | 14% | 21% | *13%* | 22% | 2% | 17% |
| BG | **48%** | 27% | *16%* | 19% | 4% | 1% | 0% |
| CZ | **45%** | 40% | *6%* | 13% | 18% | 0% | 7% |
| DK | **32%** | 23% | *20%* | 21% | 22% | 5% | 2% |
| DE | **43%** | 27% | 32% | *21%* | 7% | 3% | 3% |
| EE | **53%** | 33% | *10%* | 11% | 18% | 1% | 7% |
| IE | **49%** | 23% | 21% | *12%* | 7% | 3% | 5% |
| EL | **63%** | 31% | 24% | *11%* | 10% | 2% | 0% |
| ES | **54%** | 40% | 20% | *15%* | 8% | 2% | 0% |
| FR | **40%** | *22%* | 33% | 22% | 12% | 1% | 2% |
| IT | **51%** | 19% | 18% | *8%* | 15% | 6% | 9% |
| CY | **74%** | 22% | 19% | *11%* | 1% | 10% | 11% |
| LV | **37%** | 28% | *19%* | 21% | 3% | 8% | 11% |
| LT | **65%** | 18% | *14%* | 15% | 7% | 1% | 12% |
| LU | 34% | 28% | **36%** | *22%* | 7% | 0% | 7% |
| HU | **51%** | 35% | *0%* | 26% | 8% | 0% | 6% |
| MT | **31%** | 27% | *8%* | 19% | 32% | 1% | 8% |
| NL | **28%** | **28%** | **28%** | *8%* | 28% | 3% | 3% |
| AT | **44%** | 16% | *11%* | 13% | 21% | 7% | 8% |
| PL | **70%** | 22% | *15%* | 27% | 5% | 0% | 3% |
| PT | **49%** | 38% | *15%* | 18% | 10% | 2% | 1% |
| RO | **48%** | 18% | 24% | *16%* | 19% | 0% | 0% |
| SI | **65%** | 28% | 9% | *8%* | 7% | 3% | 2% |
| SK | **59%** | 34% | *16%* | 19% | 14% | 0% | 1% |
| FI | **55%** | 33% | *24%* | 25% | 13% | 0% | 2% |
| SE | **28%** | 21% | 23% | *16%* | 4% | 15% | 11% |
| UK | **52%** | 25% | 25% | *9%* | 19% | 4% | 5% |
| HR | 60% | 18% | 7% | 27% | 11% | 4% | 0% |
| TR | 30% | 15% | 40% | 31% | 10% | 0% | 0% |
| MK | 79% | 3% | 13% | 14% | 1% | 0% | 2% |
| IS | 29% | 21% | 6% | 19% | 11% | 12% | 18% |
| ME | 82% | 17% | 4% | 5% | 8% | 0% | 6% |
| NO | 42% | 18% | 18% | 22% | 19% | 4% | 1% |
| RS | 58% | 10% | 20% | 18% | 8% | 8% | 5% |
| AL | 97% | 2% | 3% | 60% | 1% | 0% | 0% |
| LI | 26% | 15% | 22% | 15% | 22% | 11% | 3% |
| IL | 33% | 27% | 19% | 19% | 17% | 5% | 6% |
| US | 45% | 54% | 9% | 11% | 5% | 1% | 11% |

**Highest percentage per country** *Lowest percentage per country*
Highest percentage per item Lowest percentage per item

For SMEs that are *not* currently offering green products or services the following can be observed:

- The largest segment of SMEs in 12 Member States indicate that none of the types of support listed would help them to launch their range of green products or services. This is particularly the case in Estonia (53%) and Luxembourg (50%).
- Financial incentives for developing products, services or new production processes is the type of support which is most likely to be mentioned in all the countries surveyed. 50% of SMEs in Latvia, 45% in Slovenia and 42% in Poland name this as one of the types of support that would help them the most to launch their range of green products or services. The highest figure overall is found in Montenegro (80%), followed by Serbia (60%).

Q30 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 for these products or services | Technical advice and consultancy services for products, services development or production processes | Consultancy services for marketing or distribution | None (DO NOT READ OUT) | Other (DO NOT READ OUT) | Don't know |
|---|---|---|---|---|---|---|---|
| EU27 | 31% | 15% | 14% | 10% | 31% | 5% | 12% |
| BE | **23%** | 21% | 16% | *9%* | 33% | 1% | 13% |
| BG | **37%** | 17% | 16% | *11%* | 18% | 9% | 13% |
| CZ | **30%** | 11% | 21% | *5%* | 44% | 1% | 10% |
| DK | **13%** | **13%** | *6%* | *6%* | 43% | 11% | 17% |
| DE | **32%** | 17% | *12%* | 16% | 31% | 3% | 12% |
| EE | **8%** | *2%* | 4% | 3% | 53% | 4% | 29% |
| IE | **18%** | 8% | 11% | *4%* | 12% | 0% | 55% |
| EL | **37%** | 31% | *11%* | 13% | 35% | 1% | 2% |
| ES | **30%** | 23% | 16% | *8%* | 39% | 0% | 6% |
| FR | **32%** | 18% | *17%* | *17%* | 26% | 2% | 9% |
| IT | **27%** | 6% | 5% | *4%* | 36% | 13% | 14% |
| CY | **28%** | *9%* | 10% | 18% | 24% | 10% | 30% |
| LV | **50%** | 26% | 14% | *9%* | 17% | 3% | 9% |
| LT | **41%** | *11%* | 17% | 14% | 21% | 3% | 14% |
| LU | **24%** | *5%* | 20% | 9% | 50% | 2% | 6% |
| HU | **36%** | 12% | *6%* | 10% | 37% | 3% | 9% |
| MT | **16%** | 6% | 9% | *5%* | 42% | 25% | 7% |
| NL | **18%** | 14% | 10% | *6%* | 38% | 3% | 18% |
| AT | **26%** | 15% | *8%* | 9% | 43% | 3% | 15% |
| PL | **42%** | 14% | 28% | *11%* | 17% | 0% | 9% |
| PT | **28%** | 15% | 20% | *11%* | 31% | 5% | 14% |
| RO | **40%** | *19%* | *19%* | 24% | 19% | 1% | 6% |
| SI | **45%** | 22% | 13% | *12%* | 26% | 5% | 8% |
| SK | **41%** | 23% | 17% | *13%* | 23% | 4% | 10% |
| FI | **39%** | 15% | 19% | *13%* | 30% | 4% | 3% |
| SE | **18%** | 9% | 12% | *5%* | 3% | 46% | 14% |
| UK | **33%** | 15% | 13% | *10%* | 31% | 1% | 19% |
| HR | 40% | 13% | 17% | 13% | 35% | 2% | 5% |
| TR | 33% | 27% | 26% | 19% | 13% | 0% | 10% |
| MK | 53% | 4% | 17% | 19% | 14% | 6% | 7% |
| IS | 33% | 16% | 17% | 8% | 25% | 0% | 21% |
| ME | 80% | 12% | 4% | 15% | 5% | 3% | 0% |
| NO | 37% | 12% | 24% | 8% | 24% | 4% | 9% |
| RS | 60% | 9% | 6% | 2% | 16% | 8% | 10% |
| AL | 50% | 1% | 20% | 24% | 19% | 0% | 12% |
| LI | 21% | 13% | 15% | 9% | 18% | 2% | 37% |
| IL | 20% | 8% | 6% | 8% | 28% | 16% | 22% |
| US | 37% | 18% | 13% | 6% | 29% | 2% | 20% |

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

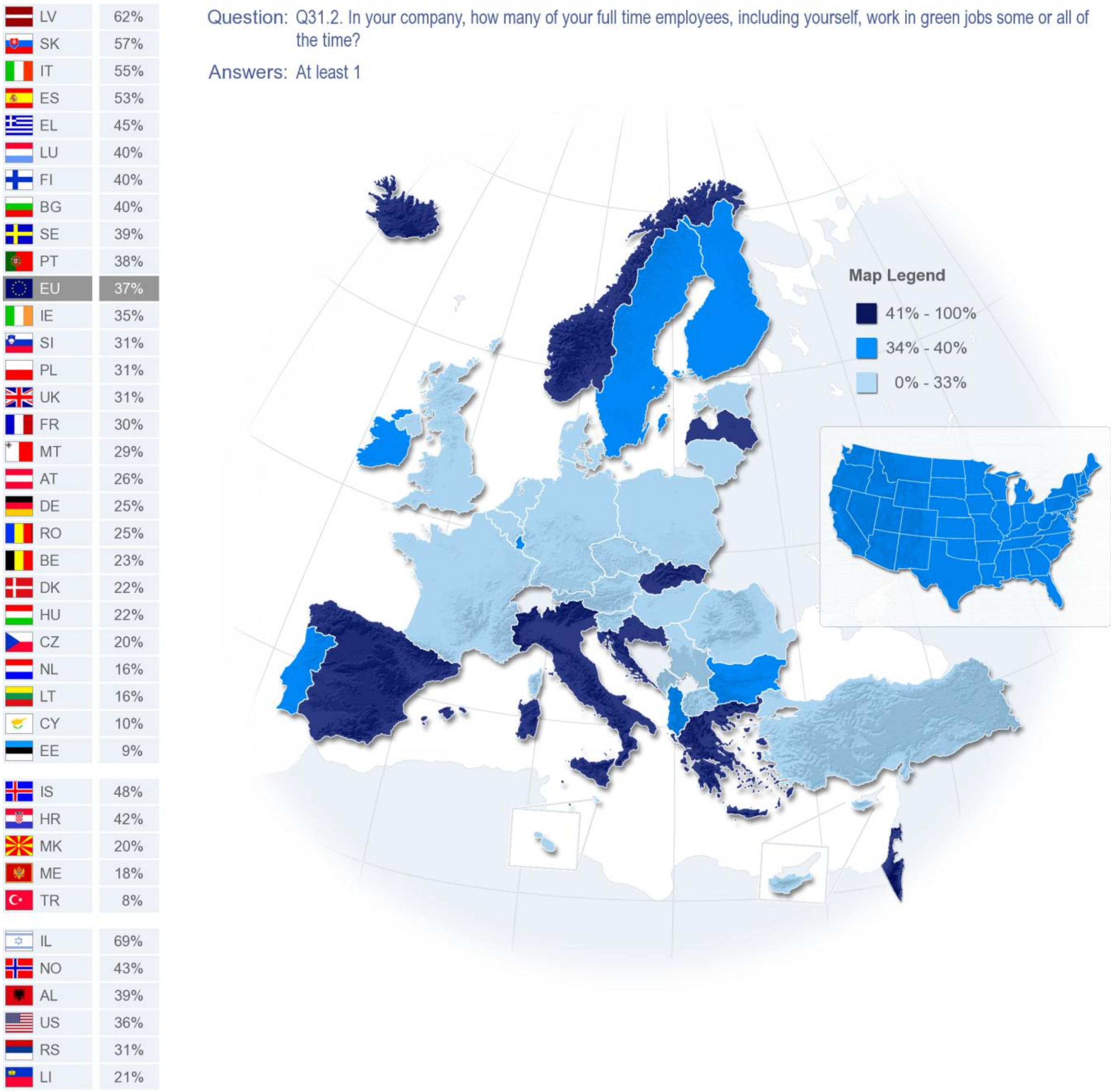
| Highest percentage per item | Lowest percentage per item |
|---|---|

## 2.4 The number of green jobs in SMEs today and in 2014

***- 37% of SMEs in the EU have employees that work in green jobs –***

*A green job is one that directly works with information, technologies, or materials that preserves or restores environmental quality. This requires specialized skills, knowledge, training, or experience.*

**37% of SMEs in the EU report they have at least one full-time employee who works some or all of the time in a green job.** The figure is higher for SMEs located in the EU15 countries (40%) than for NMS12 SMEs (28%). Furthermore, green jobs are significantly more common in large companies than in SMEs (60% vs. 37%). Among SMEs, medium-size companies (50%) outnumber small (39%) and micro (36%) companies in terms of green jobs.



- SMEs in Latvia (62%), Slovakia (57%), Italy (55%) and Spain (53%) are the most likely to report they have at least one full-time employee in a green job. A high figure is observed also for Israel (69%).
- At the other end of the ranking, the fewest SMEs with at least one green job in the EU are observed in SMEs in Estonia (9%) and Cyprus (10%). Green jobs are also relatively rare in SMEs in Turkey (8%).

Taking together all SMEs surveyed in the EU, the average number of green jobs is 1.7. There are no considerable differences between EU15 and NMS12 countries. However, the average proportion of green jobs is higher in the US than in the EU (2.2 vs. 1.7).

The average number of green jobs tends to reflect the size of a company. Large companies in the EU have on average 26.4 green jobs in comparison to 1.7 in the SMEs.

When looking at the average number of green jobs among those SMEs that have at least one employee in a green job, the average increases to 4.3. SMEs in the NMS12 countries report higher average proportion than SMEs in the EU15 countries (5.4 vs. 4.1). Furthermore, the average number of green jobs is also higher in SMEs in the US than in the European Union (5.9 vs. 4.3).

As above, the average number of green jobs in SMEs that have at least one employee in such position is considerably higher among large companies than SMEs (37.6 vs. 4.3).

At national level, the following can be observed firstly among all SMEs surveyed:

- The largest averages of green jobs in the EU are reported by SMEs located in Slovakia (4.2), Latvia (3.6) and Greece (3.0). High figures are also recorded in Israel (8.7) and Serbia (4.7).
- The lowest levels of green jobs are seen in Estonia (0.5), Lithuania (0.5) and Cyprus (0.4). Outside the EU, the lowest average is recorded in Turkey (0.6).

| | Average (All SMEs) |
|---|---|
| EU27 | 1,7 |
| SK | 4,2 |
| LV | 3,6 |
| EL | 3,0 |
| BG | 2,5 |
| ES | 2,4 |
| SI | 2,4 |
| AT | 2,3 |
| PT | 2,0 |
| UK | 1,9 |
| IE | 1,8 |
| PL | 1,8 |
| SE | 1,7 |
| IT | 1,6 |
| RO | 1,4 |
| DE | 1,3 |
| LU | 1,3 |
| FI | 1,3 |
| CZ | 1,2 |
| BE | 1,1 |
| FR | 1,1 |
| DK | 1,0 |
| HU | 0,9 |
| NL | 0,9 |
| MT | 0,7 |
| EE | 0,5 |
| LT | 0,5 |
| CY | 0,4 |

| | |
|---|---|
| HR | 2,4 |
| TR | 0,6 |
| MK | 1,1 |
| IS | 3,2 |
| ME | 0,9 |
| NO | 2,8 |
| RS | 4,7 |
| AL | 1,3 |
| LI | 0,8 |
| IL | 8,7 |
| US | 2,2 |

When then looking at exclusively those SMEs that have at least one employee in a green job, the following can be observed:

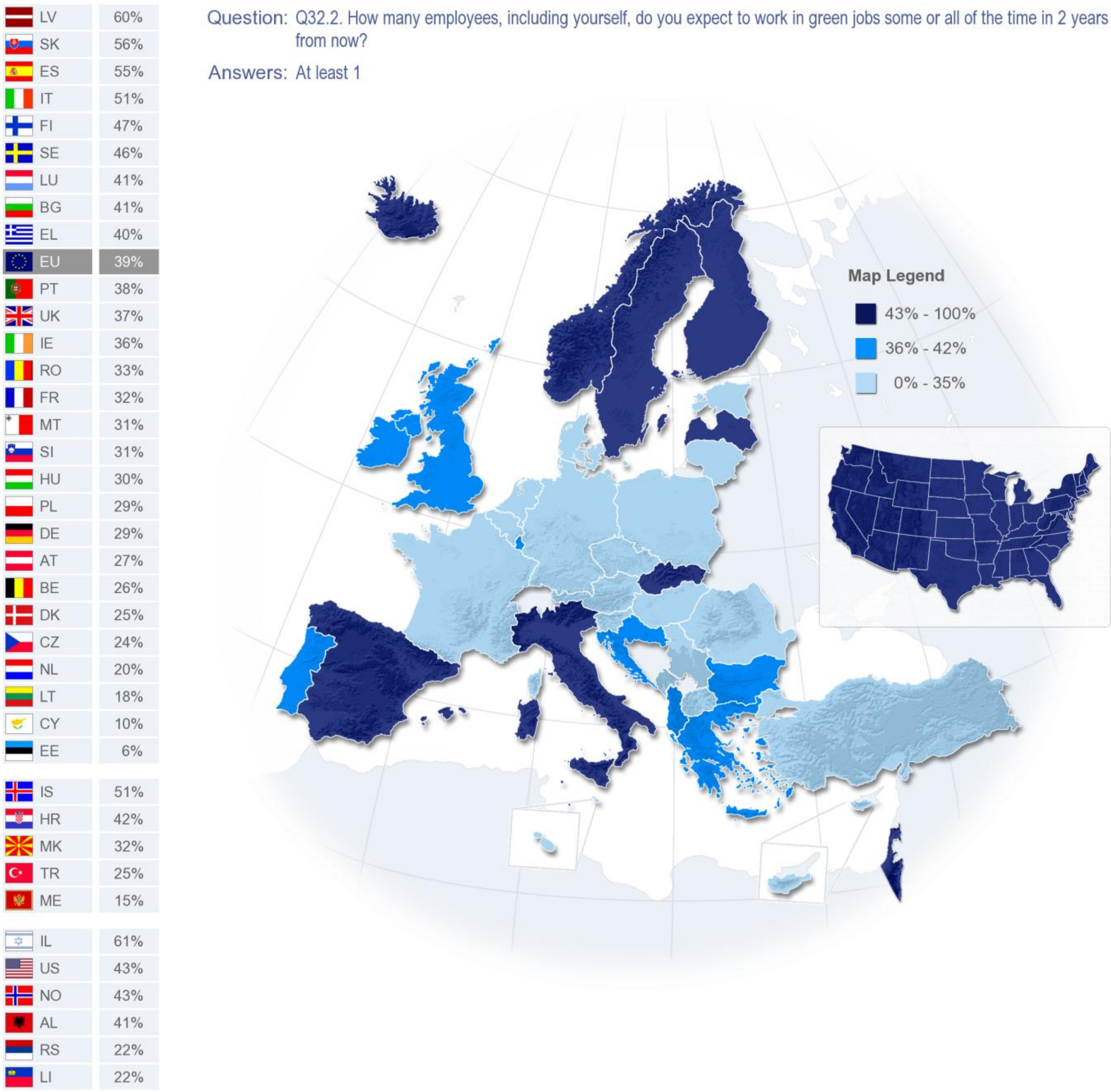
- The largest averages of green jobs in the EU are reported by SMEs located in Austria (8.2), Slovenia (7.4) and Slovakia (7.1). High figures are also recorded in Serbia (14.5) and Israel (11.8).
- The lowest levels of green jobs are seen in Finland (3.0), Italy (2.8) and Malta (2.5). Outside the EU, the lowest average is found in Albania (3.2)

| | Average (SMEs answered at least one) |
|---|---|
| EU27 | 4,3 |
| AT | 8,2 |
| SI | 7,4 |
| SK | 7,1 |
| EL | 6,5 |
| CZ | 5,9 |
| UK | 5,9 |
| BG | 5,6 |
| EE | 5,6 |
| RO | 5,6 |
| LV | 5,4 |
| PL | 5,3 |
| DE | 5,1 |
| NL | 5,1 |
| PT | 5,1 |
| IE | 4,8 |
| DK | 4,6 |
| BE | 4,5 |
| CY | 4,5 |
| ES | 4,2 |
| HU | 4,0 |
| SE | 4,0 |
| FR | 3,6 |
| LT | 3,1 |
| LU | 3,1 |
| FI | 3,0 |
| IT | 2,8 |
| MT | 2,5 |
| HR | 5,5 |
| TR | 6,8 |
| MK | 4,6 |
| IS | 5,7 |
| ME | 4,7 |
| NO | 6,0 |
| RS | 14,5 |
| AL | 3,2 |
| LI | 4,1 |
| IL | 11,8 |
| US | 5,9 |

Manufacturing and industry have the highest rates of green jobs: 40% of their SMEs have at least one green job with an average of 2 jobs per company. This is the case for also 38% of the SMEs in retail (with 1.4 jobs in average) and only 33%of the SMEs in services (with 1.6 jobs in average).

- ***Expected increase in the number of SMEs with at least one green job –***

Based on the estimates given by SMEs in the EU about how many employees, including yourself, do they expect to work in green jobs some or all of the time in 2 years from now, **the proportion of SMEs having at least one employee in a green job** will increase slightly in the next two years. The expected proportion of SMEs with at least one employee working in a green job in two years time is 39% in comparison with the current proportion of 37%.




There are no differences between SMEs' expectations in the EU15 countries and NMS12. However, a significant increase might occur in the US, where 43% of SMEs expect to have at least one employee working in a green job in two years' time, up from 36% at present.

When looking at expectations broken down by the size of company, the following can be observed:

As already reported above, large companies tend to be more likely to currently have at least one employee in a green job (60% vs. 37% for SMEs). However, no large increase can be expected based on the results of the question ‘how many employees, including yourself, do u expect to work in green jobs some or all of the time in 2 years from now’ which indicates that 61% of large companies expect to have at least one employee in a green job in the close future. Conversely, a slight increase in the number of SMEs having at least one employee in a green job can be expected among small companies (from 39% to 43%) while a slight decrease may occur among medium-size companies (from 50% to 47%). The number of micro companies having at least one employee in a green job can be expected to remain relatively stable (form 36% to 37% in two years time).

Some difference can be observed at national level when comparing the current level of SMEs having at least one green job to the proportion of employees in green jobs the representatives of SMEs expect to have in two years from now:

- The highest increase in the number of SMEs having at least one employee in a green job in two years from now can be expected in Romania and Hungary (+8 points each) as well as in Sweden and Finland (+7 points each). Outside the EU, the highest potential of growth are observed in Turkey (+17 points) and Macedonia (+12).

- Conversely, a decrease may occur in Greece (-5 points) and Italy (-4) as well as in Israel (-8) and Serbia (-9).

***- The average number of green jobs can be expected to increase slightly –***

SMEs in the EU expect to have on average of 2.3 green jobs in two years from now which represents an increase of 0.6 points in comparison to the current average of 1.7. A slight increase in the average can be deducted both in the EU15 countries (0.6 points) and in the NMS12 (0.6 points) as well as in the US (0.8 points).

An increase in the average number of employees can be expected in all size categories: 0.4 points for micro companies, 1.5 for small companies, 1.8 for medium-sized companies and 4.3 for large companies.

At national level, the following can be observed taking all SMEs together:

- The largest increase in the average number of green jobs may take place in Latvia (+3.3 points) and the Czech Republic (1.8). Outside the EU, the strongest potential growth is observed in FYROM (3.4).

The largest increase in the number of green jobs is expected in manufacturing (from 2 on average per company today to 3.3 in 2 years) where a similar proportion of companies compared to today should have this type of jobs (40%). On average, the number of green jobs is expected to increase in industry (from 2 to 2.7) and in services (from 1.6 to 2.3) as well as the proportion of companies including green jobs (respectively 41%, +1 point and 37%, +4 points). The proportion of companies with green jobs in retail should be stable (38%) but the average number of green jobs per company is expected to rise to 1.8 (+0.4 points).