EUROPEAN COMMISSION
ENTERPRISE AND INDUSTRY DIRECTORATE-GENERAL

SMEs and Entrepreneurship

# Report on the Results of the Public Consultation on the Green Action Plan for SMEs

**18 March 2014**

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# 1. Background and scope

The Green Action Plan initiative takes its lead from the Europe 2020 Strategy for smart, sustainable and inclusive growth, which emphasises the role of green growth in ensuring a lasting economic recovery within the longer term vision of a resource-efficient and low-carbon European economy. As a result, sustainable growth based on a resource efficient, low-carbon and more resilient economy is now one of the key objectives of the European Union. In order to reach the sustainability targets under the Europe 2020 Strategy, the EU has adopted a “Roadmap to a Resource Efficient Europe” [COM(2011)571], which recognises the important role of SMEs in this context. The European Industrial Renaissance Communication adopted on 22 January 2014 advocates modernising European industry by investing in resource efficiency and states that the Commission will present in 2014 a legislative initiative on resource efficiency and waste.

The Small Business Act (SBA)[1] highlighted that the EU and Member States should enable SMEs to turn environmental challenges into opportunities. The Green Action Plan initiative aims at exploiting the green opportunities, by improving productivity and driving down costs in European SMEs through resource-efficiency, by supporting green entrepreneurship and by exploiting and developing Europe's leadership in green processes and technologies. Through this public consultation the Commission wished to collect stakeholders’ views on the most effective support measures for SMEs in all sectors to become more resource efficient, commercialise internationally competitive green products and services, as well as stakeholders’ views on which actors are best placed to help SMEs in the process. All citizens and organisations were welcome to contribute to this consultation, though contributions were particularly sought from individual SMEs and public and private entities supporting SMEs.

For the purpose of this consultation, resource efficiency should be understood in a wide sense that encompasses the efficient use of energy (including renewable energy), materials, water and other natural resources, as well as the minimisation of waste, the selling of scrap material to another company and recycling.

The results of this public consultation are being used to shape the actions aimed at promoting resource efficiency for and by SMEs to be included in the forthcoming Green Action Plan for SMEs. The consultation complements the results of the Flash Eurobarometers 342 and 381 on “SMEs, resource efficiency and green markets”, which are also taken into consideration in the preparation of the Green Action Plan.

The period of consultation ran from 20 September to 12 December 2013.

There were 175 answers to the online public consultation. An additional contribution arrived after the deadline and is not included in the statistics.

For the purposes of this report, certain responses have been aggregated to present statistically significant results, as follows:

- most effective = aggregate of 'very effective' & 'rather effective'
- least effective = aggregate of 'not very effective & 'not at all effective'
- most important = aggregate of 'very important' & 'rather important'
- least important = aggregate of 'not very important' & 'not at all important'

[1] For more information: http://ec.europa.eu/enterprise/policies/sme/small-business-act/index_en.htm

## 2. Profile of the respondents

Almost half of the respondents are enterprises (46.86%), predominantly SMEs (80.49%), while organisations representing the interests of enterprises at European, national and regional levels made up more than a quarter (26.29%) so, all in all, business interests account for approximately three-quarters of the contributions (73.15%) while public administrations, both national and regional, provided 8.57% of the replies. The category 'other' constituted 11.43% and includes research institutes, trade unions, non-governmental organisations (NGOs) notably from the environmental sector, and a variety of business support agencies, organisations and consultancies.

Replies were received from across the EU with the highest response rates coming from Germany (17.14%), Belgium (12.57%), which also includes a number of European organisations, and Spain (12%) followed by Lithuania (9.71%), Italy and the UK (6.86% respectively), and Austria (5.71%).

The enterprises that responded are mainly active in the national (38.29%) and European (35.43%) markets, and only a small proportion indicated that they are active outside Europe (4.57%). In terms of sectors of activity of the enterprises, most represent the area of 'consultancy, analyses and advice' (47.56%) followed by 'manufacturing' (20.73%) and 70.73% state that they offer green products or services.

71.95% of the enterprises belong to a business or trade organisation or support network, and 72.88% of these state they have received some kind of information or assistance with regard to resource efficiency or green markets from the organisations.

As European, national and regional organisations representing the interests of enterprises make up more than 25% of the respondents, and in view of the fact that they have responded on behalf of their often substantial membership, it is found that their responses carry more weight than those of individual enterprises or other individual contributors, so their views are reported separately, notably where they diverge from the general trend. Throughout the report these organisations are referred to as 'business organisations'.

Replies from business organisations from 16 Member States were received, mainly from Belgium (notably from European umbrella organisations), Germany and Spain, which together account for 56.52% of business organisation responses.

In addition, a number of separate position papers and contributions complementing replies to the survey have been received from national and regional governments, business organisations, trade unions, European standardisation organisations and resource efficiency and 'green' interest organisations. In some cases, and as was highlighted by some European business organisations and governments, the separate contributions try to give answers to those questions that were not tailored to their activities and/or the specificities of their constituencies. These views are, where possible and relevant, reflected as comments in the different sections of this report.

The annex to this report gives a detailed statistical account of the answers to this public consultation.

## 3. Support Services for Greening SMEs

Improving resource efficiency in SMEs is said to offer enormous potential for the reduction of production costs and for productivity gains, thereby contributing to SMEs' competitiveness. European manufacturing SMEs spend on average 40% of their costs on materials and supplies with energy and water pushing this to 50% of their total costs. A better use of resources is estimated to represent an overall savings potential of €630 billion per year for European industry.[2]

[2] Greennovate! Europe (2012) "Guide to resource efficiency in manufacturing: Experiences from improving resource efficiency in manufacturing companies". EuropeINNOVA.

While this potential is well recognised by SMEs in some Member States, this is not necessarily the case for all SMEs across Europe. Furthermore, not all European SMEs may be sufficiently supported in their efforts to implement potential cost savings through better resource efficiency. This may not only lead to a widening productivity gap in Europe, but also weaken the overall competitiveness of European firms as well as the chances of many SMEs to position themselves in global value chains.

In this respect, the findings of the public consultation are as follows:

Enterprises and organisations that offer resource efficiency support services to SMEs answered that almost 60% provide awareness raising, followed by advice about funding possibilities and preparation of proposals for funding (45.14%), support for technology and knowledge transfer (43.43%). Resource efficiency consultancy and information on resource efficiency success stories each account for 42.29% of support offers, while support for cross-sectoral cooperation between SMEs for resource efficiency is provided by 41.14% of respondents.

According to business organisations, this trend is globally even stronger with the main support service provided being awareness raising (73.91%), followed by advice about funding possibilities and preparation of proposals for funding and by support for cross-sectoral cooperation between SMEs for resource efficiency (60.87% respectively), while 54.35% provide support for technology and knowledge transfer and information on resource efficiency success stories. In addition, the business organisations point out that, due to the financial crisis, the priorities of enterprises have changed away from resource efficiency efforts to concentrating on core business, so the need to provide information on the benefits of, and advice on how to implement resource efficiency measures is the higher.

With regard to the effectiveness of services provided at regional and national level to support SMEs to improve their resource efficiency, respondents in general claimed that the most effective are support for technology and knowledge transfer (57.15%), resource efficiency consultancy (55.43%) and awareness raising (53.71%), while the least effective are learning platforms and resource efficiency platforms (51.43%) followed by self-assessment tools for SMEs to compare own resource efficiency with that of others (50.28%) and support for cross-sectoral cooperation between SMEs for resource efficiency (46.86%).[3]

As service providers themselves, business organisations rate the effectiveness of national and regional services higher than respondents in general, but their ranking of the most and least effective types of services closely reflects the overall response.

In their statements, national and regional governments welcome the objective of helping and encouraging SMEs to take up the benefits of resource efficiency. They also underlined that resource efficiency is a significant factor for the competitiveness of SMEs and, that against this background, it is important that the EU sends strong signals to industry that EU policy in the future will continue working towards a more sustainable, resource and energy efficient economy. In this context, governments also stress the importance of partnership and the need to establish frameworks that encourage collaboration between companies and across sectors as well as involving public bodies, NGOs, business groups and a wider range of stakeholders. The role that clusters can play in the transition towards more resource efficient companies and value chains was also highlighted by governments.

UNEP[4] advocates the establishment of centres of excellence for resource efficiency in industry and related organisations, while other respondents call on the European Commission to harmonise and coordinate resource efficiency support across Member States such as through the establishment of an EU body to ensure that the benefits of resource efficiency are widely understood and supported

[3] The 'don't know' response rate for this category of questions averaged 15%

[4] United Nations Environment Programme

by statistical evidence, e.g. in the form of a database, and to facilitate sharing of resource efficiency information and knowledge throughout the Union.

### 3.1 The role of the Enterprise Europe Network in support of the Green Action Plan for SMEs

20% of respondents are members of the Enterprise Europe Network (EEN), while more than 40% (41.71%) state they know what the Network is. Of the Network members, 40% belong to one of its sector groups, notably the 'environment' group (42.86%) and the 'intelligent energy' group (21.43%).

All sector group members find resource efficiency an important subject in their sector.

As could be expected, many of the business organisations (30.43%) are members of the Enterprise Europe Network and a further 43.48% are aware of the Network. Amongst the EEN members, a third form part of the 'intelligent energy' sector group and all EEN members agree that resource efficiency is an important subject in their sector.

When it comes to the effectiveness of Enterprise Europe Network actions helping SMEs to become resource efficient, the following were found to be most effective by respondents that were either EEN members or aware of the Network: specific matchmaking events promoting the take-up of green technologies (71.3%) and, with an equal score of 70.38%, resource efficiency and eco-innovation as cross-cutting for B2B and C2C matchmaking events and strategic collaboration on resource efficiency between the Network and other key partners. The actions considered to be the least effective are showcasing green technologies developed or tested by EU programmes (22.22%), a transversal resource efficiency sector group (21.29%) and improved classification of resource efficiency technologies in the EEN database to offer better partner search services (18.52%).[5]

The responses of business organisations match the general rating of the effectiveness of Enterprise Europe Network actions helping SMEs to become resource efficient with one notable difference: 67.65% rate that improved classification of resource efficiency technologies in the EEN database to offer better partner search services is effective, which is opposite to the general viewpoint.

Furthermore, in their position papers, business organisations highlight the lack of consultants specialised in resource and energy efficiency with specific expertise on SMEs, and call for a broader network combining such expertise from different networks and countries, including strengthening the role of the EEN in this respect, to provide resource efficiency services to SMEs.

The European Standardisation Organisations highlight their efforts to provide tools and mechanisms to make it easier for SMEs to engage with standardisation, and they propose a new EEN action on "[providing] information on how standards can help SMEs to become more resource efficient".

## 4. Access to finance

Resource efficiency improvements may need up-front investments and reorganisation within an enterprise. The Eco-Innovation Observatory highlighted that the required investments for better resource efficiency are often relatively low (less than €10 000), whereas expected savings can be up to 10 times the amount invested with relatively short payback periods.[6]

On this topic, due to its importance, the findings of the public consultation have been confronted and complemented with the results of the Flash Eurobarometer on 'SMEs, resource efficiency and green

[5] The 'don't know' response rate for this category of questions averaged 16.4%.

[6] Eco-innovation Observatory, Annual Report 2010, “Business perspective: Saving material costs”

markets' n° 381, published in December 2013.[7] On this subject, the Eurobarometer survey asked 10.511 SMEs that are taking at least one resource efficiency action about the impact that their resource efficiency actions have had on production costs over the past two years. More than four in ten (42%) say that these actions have decreased production costs: 5% say significantly so, while 37% say the decrease has been slight. Overall this represents an increase of seven percentage points compared to the precedent Eurobarometer survey of 2012 (42% vs. 35%).

Less than one in five (21%) say that production costs have increased – 6% say significantly so. This is a decrease compared to the last wave (-4 percentage points). One quarter of SMEs say their resource efficiency actions have had no impact on production costs (25%), a decrease of two points since 2012.

The Eurobarometer also highlighted that most of the investments on resource efficiency are low cost. In the last two years at least seven out of ten SMEs have invested less than 5% of their annual turnover per year in being more resource efficient (72%). In fact 39% say they have invested less than 1%, while 33% have invested 1-5%.

Regarding the findings of the public consultation, only a few respondents (12) replied to the open questions on the amount of money they had invested in resource efficiency measures and the timeframe for return on these investments. Among those 12 respondents, investments appear to be low, in line with the results of the Eurobarometer, and to result in 20-30% savings on resource use, with a relatively short pay-back period of 2-3 years. Yet, the type of resource efficiency measures implemented is unknown, so no further conclusions can be drawn.

The majority of SME respondents to the public consultation have not tried to estimate the investment cost to improve their resource efficiency because they either never thought of it (35.43%) or thought it was too complicated (30.29%), while another 21.14% report having done so by themselves and only 8.57% had received help from experts. Business organisations report similar trends.

In terms of the effectiveness of the national and regional actions to help SMEs to estimate the costs of resource efficiency investments, the ones considered most effective are advisory and consultancy services (45.72%) and the least effective self-assessment tools to calculate return on investment (38.29%).[8] These results are fully reflected in the responses from business organisations.

The most important barriers to obtaining financing for resource efficiency investments are found to be the fact that resource efficiency investments are believed to take too long to be financially viable (72%) (for 35.43% of the 175 respondents this is a very important barrier, while for 36.57% it is rather important) and that the financial return is not high enough (65.85%). At the other end of the scale, the barriers considered least important are that investments are too small (42.85%) or too complex (32.57%). Business organisations identify an additional important barrier, namely finance providers' lack of sufficient understanding of resource efficiency investments (78.26%). This is backed up in their position papers where they specifically call for training of staff of financial institutions to be able to evaluate investment projects in resource efficiency for SMEs as well as access for financial institutions to data to better assess risks related to resource efficiency investments. They also cite the complexity of administrative procedures and the time required to access public funding for resource efficiency measures, as barriers.

However, the findings of this public consultation need to be taken with caution as the Eurobarometer results clearly state that most of SMEs are satisfied with the return they have received on their investments in resource efficiency (68%), with 12% saying they are 'very satisfied'.

[7] Link to the full report: ec.europa.eu/public_opinion/flash/fl_381_en.pdf

[8] The 'don't know' response rate for this category of questions averaged 27.04%.

To overcome barriers to resource efficiency investment, the most effective measures are specific financing lines for resource efficiency projects (76%) and instruments to decrease the risk of such projects (70.29%), while those deemed least effective are third party audits to demonstrate the interest of resource efficiency projects (26.86%) and bundling of small projects into one large resource efficiency project (25.15%).[9] Again, the rating and ranking of the effectiveness of measures to overcome barriers to finance indicated by business organisations are fully in line with those of the general response.

With regard to access to finance, national and regional governments emphasize the need for better coordination and sharing of experience across Member States of different types of financing schemes, rather than the establishment of new funding schemes. They also advocate the use of intermediary organisations such as 'resource brokers' as an efficient means of supporting SMEs to help them understand what actions can be taken, where to go for advice, and to assist them in the preparation of bankable projects.

Green interest organisations highlight the "asymmetric information between SMEs and potential funders" as a main barrier for resource efficiency innovations and call for more use of crowd-funding approaches in this domain.

Some respondents highlight the need for more fiscal incentives for resource efficiency investments and for the commercialisation of green products and services and call for governments at all levels, including the EU, to facilitate SMEs' access to credit, loans and funding for resource efficiency investments. Others raise the particularities of energy markets calling for a clearer legal framework for energy services to facilitate investor confidence in the sector.

# 5. Supporting SMEs in a greener value chain

The savings potential of resource efficiency optimisation across the value chain can reach 55-75% in some sectors,[10] while conservative estimates at company level situate it at 5 to 10% of material inputs.[11] 60% of total waste in the EU is not recycled, composted or reused[12], which represents an enormous leakage of valuable resources. Currently, 44% of large companies in the EU sell their scrap material to another company, while only 24% of SMEs do so[13].

Against this background, the findings of the public consultation are as follows:

Respondents find that actions in support of resource efficiency are more important at company level (92%) than along the whole value chain (87.43%) or at certain stages of the value chain (77.14%). Business organisations agree but with slightly higher ratings for each category.

With regard to the stages of the value chain, support for resource efficiency is most important for waste management (89.15%) followed by production operations (86.86%) and recycling (86.28%). The least important stages are found to be marketing and sales (38.29%), inbound logistics (30.85%) and outbound logistics (27.43%).

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[9] The 'don't know' response rate for this category of questions averaged 16.8%.

[10] 'Resource Efficiency Potentials of Manufacturing Industries' Stuttgart, February 2013. Study performed by Greenovate! Europe EEIG with substantial support from the UK Department for Environment, Food and Rural Affairs (Defra).

[11] Eco-Innovation Observatory, Annual Report 2012

[12] Eurostat waste statistics (2011)

[13] Flash Eurobarometer 2012 on SMEs, resource efficiency and green markets

The business organisation response is similar to that of the general response, but they rate waste management (93.47%) and production operations (86.96%) somewhat higher and also see processing of raw materials (80.43%) as an important stage of the value chain to support resource efficiency, followed by recycling (78.26%). The ranking of the least important stages is the same.

On average, respondents rated that the most important drivers of resource efficiency within the value chain are large companies (90.86%), followed by SMEs (88.57%) and third party intermediaries offering services (70.28%).

The view of business organisations is a little different, rating SMEs (93.48%) more important drivers than large companies (91.3%) and also finding third party intermediaries more important (78.26%) than the general response.

The most important intermediaries offering services in the value chain are considered to be technological centres (78.86%), service providers and consultants (72.57%), business organisations and research organisations (69.71% each), while non-governmental organisations (NGOs) were found the least important with 48.58% followed by educational establishments (29.72%) and national administrations and industrial symbiosis 'matchmaking' (27.43% each).

According to business organisation, the rating is higher overall and the rankings slightly reversed: the most important intermediaries are technological centres (84.79%) with business organisations in second place (80.44%) followed by research organisations and service providers and consultants (76.08% each). The least important intermediaries remain non-governmental organisations (67.4%) followed by industrial symbiosis 'matchmaking' (36.96%) and educational establishments (32.61%).

Business organisations and other respondents also point to the need for strong partnership between the different intermediaries in the value chain to share information and knowledge in order to provide better services to SMEs all along the value chain, and they specifically refer to the role clusters and eco-innovation centres as providers of customised awareness raising, advice and coaching, including concrete guidance and on-location support, in this respect.

National and regional governments highlight the fact that SMEs often need support in contributing to greener value chains and that resource efficiency needs to be addressed both within companies in the value chain and along the value chain, so it is important to exploit all opportunities. The focus should be on those aspects of the value chain that have the greatest potential for both environmental improvement and economic opportunity.

Other respondents point to the role of the media, including social networks, in raising awareness of both the business case for resource efficiency and the environmental case through marketing campaigns featuring best practice and success stories.

# 6. New business opportunities in a greener economy

Greening the economy offers many business opportunities for SMEs at local, national and international level. However, many SMEs may find it difficult to seize such opportunities.

The findings of the public consultation are as follows:

Respondents in general deem that the role of environmental labels in facilitating access to markets for green products and/or services is important (74.86%) rather than not (20%), and business organisations globally agree.

National and regional governments point out that environmental labelling and certification is but one way for businesses to demonstrate their environmental credentials. Other respondents call for the integration of resource efficiency into exiting environmental labels and certification schemes in order to simplify life for consumers and build up their trust.

As concerns local and regional strategies to mobilise all interested actors towards a more resource efficient and low carbon economy in the region, 40% of respondents state they are aware of such initiatives while 33.14% are not. The awareness of business organisations of local and regional strategies is higher (43.48%) and, consequently, the proportion of those that are not is lower (23.91%).

Amongst those who are aware of such initiatives, 72.86% consider the local and regional policy strategies to be effective in helping to promote local creation and businesses while the figure for business organisations is 70%.

Many respondents highlight the importance of collaboration at local level between public administrations, community groups, green interest organisations and NGOs with local businesses to implement green strategies and to promote local products and services, including green retailing. Some also call for national and European coordination of such strategies and schemes.

Business organisations and trade unions also stress the skills aspect, which is not directly addressed by the consultation, calling for more information and guidance on 'green' skills development for resource efficiency for SMEs to take advantage of green business opportunities, not only in relation to new jobs but also in terms of upgrading and developing the existing skills of workers, notably through better recognition of non-formal training and validation of competences and qualifications as part of lifelong learning, and UNEP highlights the need to include resource efficiency aspects also in university curricula.

Business organisations support the circular economy or industrial symbiosis principle but see the high cost of recycling of certain products as a disincentive and also refer to the need to review the national classification of certain types of waste as reusable products in order to achieve a real circular approach.

Generally, governments are supportive of the circular economy or industrial symbiosis approach, and they encourage the Commission to support knowledge sharing and commercial cooperation between SMEs on the potentials of such green business models, e.g. product-service systems, cradle-to-cradle product and service innovation and take-back systems, and on the potentials for resource optimisation across value chains such as repair cycles, recycling or 'upcycling' of waste, notably of industrial waste, into new materials or products of better environmental value.

Green interest organisations mention non-financial environmental information as another way for businesses to demonstrate their green commitments, citing life cycle management, eco-design, environmental footprint, and extended producer responsibility (EPR) schemes as examples, and they emphasize the important role, consumers play in this context. They also advocate the adoption of the EU Environmental Technology Verification (ETV) tool across Europe.

Some respondents refer to green public and private procurement as a means to promote a greener economy, as well as to the role of high environmental standards by regulation for stimulating green innovation.

# 7. SMEs selling green products and services abroad

The EU makes up roughly one third of the world market for environmental industries and is a net exporter. SMEs in the environmental industry are good at home, but fail to be internationally successful in a world market that is growing by 5% a year and is expected to triple by 2030.[14] Very

[14] IDEA Consult, ECORYS, 2009. Study on the competitiveness of the EU eco-industry; Federal Ministry for the Environment, Nature Conservation and Nuclear Safety, 2009, "Greentech – Made in Germany 2.0"

few SMEs in the EU offer their green catalogue of products or services in countries outside the EU. With BRIC countries (Brazil, Russia, India and China) estimated to account for about 60% of world GDP by 2030, only 3% of SMEs in the EU have so far ventured to sell their green products or services in Asia and South Pacific, and a mere 2% in Latin America[15].

In this context, the findings of the public consultation are as follows:

Respondents in general are of the opinion that SMEs are quite interested in selling green products and/or services on international markets: 29.14% state they are very interested while 44.57% find them to be rather interested, and only 19.43% think they are not very interested in such opportunities. Business organisations agree with this rating. The most effective support actions to help SMEs promote their green products and/or services in global markets are found to be pre-market entry support (basic research and market intelligence, finance planning, personnel identification, understanding of local business culture and identifying suitable locations) (84%), business cooperation and networking, including matchmaking events (83.43%), identifying potential foreign business partners (82.29%) and easing access to local finance (79.43%). The least effective actions are considered to be online information portals for EU SMEs (34.29%), temporary office facilities in target markets (28.57%), exhibiting in international trade fairs (28%) and coaching (26.86%).

Business organisations generally agree, with the most effective support action being business cooperation and networking, including matchmaking events (91.3%) followed by three other actions on a par (86.95%), namely pre-market entry support, identifying potential foreign business partners and easing access to local finance. The least effective support action remains temporary office facilities in target markets (30.43%), online information portals for EU SMEs and exhibiting in international trade fairs (28.2% each).

With regard to the most effective providers of services for the internationalisation of green products or services, respondents in general consider that business organisations and cluster organisations are clearly in the lead with 78.86% and 73.15%, respectively, while public administrations (41.14%) and development agencies (22.86%) are found to be the least effective. This view is shared by business organisations. Business organisations also point to the lack of appropriate guarantee and insurance schemes as a barrier for access to international markets.

Further to the role of clusters, some respondents emphasized the particular role of the Enterprise Europe Network (EEN) in supporting SMEs to enter foreign markets.

In their contribution, the European Standardisation Organisations recognise the importance of environmental protection and sustainable development and express their belief that all standards must take the environment and the efficient use of resources into consideration in order to add value for green solutions in European and international markets. However, other respondents refer to the cost of certification for environmental standards as a barrier.

With regard to access to international markets, national and regional governments highlight that the trajectory for new green innovations and products to reach global markets is long and burdensome, especially for SMEs that often do not have the necessary resources to take on the related challenges. EU actions should complement national efforts in this area by providing the best possible international level playing field, notably acting against barriers to trade in third countries, ensuring intellectual property rights and opening up new markets, e.g. though Free Trade Agreements.

[15] Flash Eurobarometer 2012 on SMEs, resource efficiency and green markets

# ANNEX: Overall response statistics

## 1.Your Profile

| You are: | Number of requested records | % Requested records(175) | % of total number records(175) |
|---|---|---|---|
| an enterprise | 82 | 46,86% | 46,86% |
| an organisation representing the interests of enterprises | 46 | 26,29% | 26,29% |
| public administration | 15 | 8,57% | 8,57% |
| technology centre | 3 | 1,71% | 1,71% |
| development agency | 4 | 2,29% | 2,29% |
| university | 5 | 2,86% | 2,86% |
| Other | 20 | 11,43% | 11,43% |

| You are based in the following country | Number of requested records | % Requested records(175) | % of total number records(175) |
|---|---|---|---|
| Austria | 10 | 5,71% | 5,71% |
| Belgium | 22 | 12,57% | 12,57% |
| Bulgaria | 9 | 5,14% | 5,14% |
| Cyprus | 1 | 0,57% | 0,57% |
| Croatia | 0 | 0,00% | 0,00% |
| Czech Republic | 4 | 2,29% | 2,29% |
| Denmark | 3 | 1,71% | 1,71% |
| Estonia | 2 | 1,14% | 1,14% |
| Finland | 4 | 2,29% | 2,29% |
| France | 3 | 1,71% | 1,71% |
| Germany | 30 | 17,14% | 17,14% |
| Greece | 3 | 1,71% | 1,71% |
| Hungary | 2 | 1,14% | 1,14% |
| Ireland | 1 | 0,57% | 0,57% |
| Italy | 12 | 6,86% | 6,86% |
| Latvia | 0 | 0,00% | 0,00% |
| Lithuania | 17 | 9,71% | 9,71% |
| Luxembourg | 1 | 0,57% | 0,57% |
| Malta | 0 | 0,00% | 0,00% |
| Netherlands | 3 | 1,71% | 1,71% |
| Poland | 3 | 1,71% | 1,71% |
| Portugal | 2 | 1,14% | 1,14% |
| Romania | 2 | 1,14% | 1,14% |
| Slovakia | 0 | 0,00% | 0,00% |
| Slovenia | 1 | 0,57% | 0,57% |
| Spain | 21 | 12,00% | 12,00% |
| Sweden | 3 | 1,71% | 1,71% |
| United Kingdom | 12 | 6,86% | 6,86% |
| Other | 4 | 2,29% | 2,29% |

| Where is your organisation or enterprise predominantly active or sell its products or services? | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(175) | % of total number records(175) |
| European market | 62 | 35,43% | 35,43% |
| National market | 67 | 38,29% | 38,29% |
| Regional market | 30 | 17,14% | 17,14% |
| Local or municipal market | 8 | 4,57% | 4,57% |
| Outside Europe | 8 | 4,57% | 4,57% |

| Please indicate the size of the enterprise | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(82) | % of total number records(175) |
| Self-employed | 8 | 9,76% | 4,57% |
| Micro enterprise (1-9 employees) | 24 | 29,27% | 13,71% |
| Small enterprise (10-49 employees) | 26 | 31,71% | 14,86% |
| Medium-sized enterprise (50-249 employees) | 16 | 19,51% | 9,14% |
| More than 250 employees | 8 | 9,76% | 4,57% |

| What is the main activity of your enterprise | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(82) | % of total number records(175) |
| Manufacturing | 17 | 20,73% | 9,71% |
| Electricity, gas and water supply | 0 | 0,00% | 0,00% |
| Construction | 2 | 2,44% | 1,14% |
| Wholesale and retail trade | 3 | 3,66% | 1,71% |
| Bars and restaurants | 2 | 2,44% | 1,14% |
| Tourism (including hotels) | 0 | 0,00% | 0,00% |
| Transport, storage and communication | 3 | 3,66% | 1,71% |
| Real estate, renting, and business activities | 0 | 0,00% | 0,00% |
| Consultancy, analysis, advice | 39 | 47,56% | 22,29% |
| Other | 16 | 19,51% | 9,14% |

| Green products and services are those with a predominant function of reducing environmental risk and minimise pollution and resources. For the purpose of this survey, this may also include products with environmental features (e.g. organically produced, eco-labelled, with an important recycled content, eco-designed...)Do you offer green products or services? | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(82) | % of total number records(175) |
| Yes | 58 | 70,73% | 33,14% |
| No | 24 | 29,27% | 13,71% |
| Don't know | 0 | 0,00% | 0,00% |

| Is your enterprise member of a business association, trade association or support network? | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(82) | % of total number records(175) |
| Yes | 59 | 71,95% | 33,71% |

| | | | |
|---|---|---|---|
| No | 18 | 21,95% | 10,29% |
| Don't Know | 5 | 6,10% | 2,86% |

| As a member of this business association, trade association or support network, have you received any information or assistance related to resource efficiency or green markets? | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(59) | % of total number records(175) |
| Yes | 43 | 72,88% | 24,57% |
| No | 11 | 18,64% | 6,29% |
| Don't Know | 5 | 8,47% | 2,86% |

| Is your organisation registered in the European Commission Transparency Register? | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(175) | % of total number records(175) |
| Yes | 41 | 23,43% | 23,43% |
| No | 134 | 76,57% | 76,57% |

## 2. Support Services for Greening SMEs

| Which services is your enterprise or organisation already providing to help SMEs to be more resource efficient? | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(175) | % of total number records(175) |
| I don't provide any services to help SMEs to be more resource efficient | 28 | 16,00% | 16,00% |
| Tool to self-assess how resource efficient is a company with respect to others | 39 | 22,29% | 22,29% |
| Awareness raising | 104 | 59,43% | 59,43% |
| Resource efficiency coaching | 54 | 30,86% | 30,86% |
| Resource efficiency consultancy | 74 | 42,29% | 42,29% |
| Support for technology and knowledge transfer | 76 | 43,43% | 43,43% |
| Learning platforms and resource efficiency fora | 42 | 24,00% | 24,00% |
| Advice about funding possibilities, financial planning, preparation of proposals to get funding | 79 | 45,14% | 45,14% |
| Funding for resource efficiency investments | 34 | 19,43% | 19,43% |
| Information on success stories demonstrating the benefits of resource efficiency for SMEs | 74 | 42,29% | 42,29% |
| Facilitate cooperation between SMEs across sectors for more resource efficient processes, to reuse waste as by-product, development of new technologies | 72 | 41,14% | 41,14% |

How effective are the following services provided in your region or country in helping SMEs to improve their resource efficiency? (Please tick boxes)

| Tool to self-assess how resource efficient is a company with respect to others | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(175) | % of total number records(175) |
| Very effective | 11 | 6,29% | 6,29% |
| Rather effective | 40 | 22,86% | 22,86% |
| Not very effective | 65 | 37,14% | 37,14% |
| Not at all effective | 23 | 13,14% | 13,14% |
| Don't Know | 36 | 20,57% | 20,57% |

| Awareness raising | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(175) | % of total number records(175) |
| Very effective | 28 | 16,00% | 16,00% |
| Rather effective | 66 | 37,71% | 37,71% |
| Not very effective | 56 | 32,00% | 32,00% |
| Not at all effective | 8 | 4,57% | 4,57% |
| Don't Know | 17 | 9,71% | 9,71% |

| Resource efficiency coaching | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(175) | % of total number records(175) |
| Very effective | 18 | 10,29% | 10,29% |
| Rather effective | 66 | 37,71% | 37,71% |
| Not very effective | 41 | 23,43% | 23,43% |
| Not at all effective | 14 | 8,00% | 8,00% |
| Don't Know | 36 | 20,57% | 20,57% |

| Resource efficiency consultancy | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(175) | % of total number records(175) |
| Very effective | 30 | 17,14% | 17,14% |
| Rather effective | 67 | 38,29% | 38,29% |
| Not very effective | 43 | 24,57% | 24,57% |
| Not at all effective | 11 | 6,29% | 6,29% |
| Don't Know | 24 | 13,71% | 13,71% |

| Support for technology and knowledge transfer | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(175) | % of total number records(175) |
| Very effective | 32 | 18,29% | 18,29% |
| Rather effective | 68 | 38,86% | 38,86% |
| Not very effective | 47 | 26,86% | 26,86% |
| Not at all effective | 10 | 5,71% | 5,71% |
| Don't Know | 18 | 10,29% | 10,29% |

| Learning platforms and resource efficiency fora | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(175) | % of total number records(175) |
| Very effective | 13 | 7,43% | 7,43% |
| Rather effective | 35 | 20,00% | 20,00% |
| Not very effective | 69 | 39,43% | 39,43% |
| Not at all effective | 21 | 12,00% | 12,00% |
| Don't Know | 37 | 21,14% | 21,14% |

| Advice about funding possibilities, financial planning and preparation of proposals to get funding | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(175) | % of total number records(175) |
| Very effective | 33 | 18,86% | 18,86% |
| Rather effective | 50 | 28,57% | 28,57% |
| Not very effective | 48 | 27,43% | 27,43% |
| Not at all effective | 17 | 9,71% | 9,71% |
| Don't Know | 27 | 15,43% | 15,43% |

| Funding for resource efficiency investments | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(175) | % of total number records(175) |
| Very effective | 30 | 17,14% | 17,14% |
| Rather effective | 46 | 26,29% | 26,29% |
| Not very effective | 52 | 29,71% | 29,71% |
| Not at all effective | 22 | 12,57% | 12,57% |
| Don't Know | 25 | 14,29% | 14,29% |

| Information on success stories demonstrating the benefits of resource efficiency for SMEs | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(175) | % of total number records(175) |
| Very effective | 17 | 9,71% | 9,71% |
| Rather effective | 59 | 33,71% | 33,71% |
| Not very effective | 54 | 30,86% | 30,86% |
| Not at all effective | 21 | 12,00% | 12,00% |
| Don't Know | 24 | 13,71% | 13,71% |

| Facilitate cooperation between SMEs across sectors for more resource efficient processes, to reuse waste as by-product, development of new technologies | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(175) | % of total number records(175) |
| Very effective | 27 | 15,43% | 15,43% |
| Rather effective | 39 | 22,29% | 22,29% |
| Not very effective | 57 | 32,57% | 32,57% |
| Not at all effective | 25 | 14,29% | 14,29% |
| Don't Know | 27 | 15,43% | 15,43% |

| Are you a member of the Enterprise Europe Network? |
|---|

| | Number of requested records | % Requested records(175) | % of total number records(175) |
|---|---|---|---|
| Yes | 35 | 20,00% | 20,00% |
| No, but I know what the Enterprise Europe Network is | 73 | 41,71% | 41,71% |
| No and I don't know what the Enteprise Europe Network is | 67 | 38,29% | 38,29% |

| If 'yes', are you a member of a sector group within the Enterprise Europe Network? | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(35) | % of total number records(175) |
| Yes | 14 | 40,00% | 8,00% |
| No | 16 | 45,71% | 9,14% |
| I don't know | 5 | 14,29% | 2,86% |

| If yes, which one? | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(14) | % of total number records(35) |
| Agrofood | 1 | 7,14% | 2,86% |
| Automotive, Transport and Logistics | 1 | 7,14% | 2,86% |
| BioChemTech | 0 | 0,00% | 0,00% |
| Chemicals | 0 | 0,00% | 0,00% |
| Creative industries | 1 | 7,14% | 2,86% |
| Environment | 6 | 42,86% | 17,14% |
| Healthcare | 0 | 0,00% | 0,00% |
| ICT Industry and Services | 1 | 7,14% | 2,86% |
| Intelligent Energy | 3 | 21,43% | 8,57% |
| Maritime Industry and Services | 0 | 0,00% | 0,00% |
| Materials | 0 | 0,00% | 0,00% |
| Nano- and Microtechnologies | 0 | 0,00% | 0,00% |
| Services and Retail | 0 | 0,00% | 0,00% |
| Aeronautics and Space | 0 | 0,00% | 0,00% |
| Sustainable Construction | 0 | 0,00% | 0,00% |
| Textile & Fashion | 0 | 0,00% | 0,00% |
| Tourism and Cultural Heritage | 1 | 7,14% | 2,86% |
| Woman Entrepreneurship | 0 | 0,00% | 0,00% |

| Is resource efficiency an important subject for your sector? | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(14) | % of total number records(35) |
| Very important | 9 | 64,29% | 25,71% |
| Rather important | 5 | 35,71% | 14,29% |
| Not very important | 0 | 0,00% | 0,00% |
| Not at all important | 0 | 0,00% | 0,00% |
| Don't know | 0 | 0,00% | 0,00% |

**In your opinion which of the following actions across the Enterprise Europe Network (EEN) would be more effective in helping SMEs to be more resource**

**efficient?**

| Improve the classification of technologies conducive to resource efficiency in the Enterprise Europe Network's database to offer better partner search services | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(108) | % of total number records(175) |
| Very effective | 20 | 18,52% | 11,43% |
| Rather effective | 46 | 42,59% | 26,29% |
| Not very effective | 15 | 13,89% | 8,57% |
| Not at all effective | 5 | 4,63% | 2,86% |
| Don't know | 22 | 20,37% | 12,57% |

| A transversal Resource Efficiency Sector Group in the Enterprise Europe Network gathering representatives from different sector groups | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(108) | % of total number records(175) |
| Very effective | 15 | 13,89% | 8,57% |
| Rather effective | 46 | 42,59% | 26,29% |
| Not very effective | 19 | 17,59% | 10,86% |
| Not at all effective | 4 | 3,70% | 2,29% |
| Don't know | 24 | 22,22% | 13,71% |

| Showcase within the Enterprise Europe Network green technologies developed or tested by EU programmes | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(108) | % of total number records(175) |
| Very effective | 26 | 24,07% | 14,86% |
| Rather effective | 42 | 38,89% | 24,00% |
| Not very effective | 19 | 17,59% | 10,86% |
| Not at all effective | 5 | 4,63% | 2,86% |
| Don't know | 16 | 14,81% | 9,14% |

| Specific EEN matchmaking events to promote the take-up of green technologies | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(108) | % of total number records(175) |
| Very effective | 28 | 25,93% | 16,00% |
| Rather effective | 49 | 45,37% | 28,00% |
| Not very effective | 15 | 13,89% | 8,57% |
| Not at all effective | 2 | 1,85% | 1,14% |
| Don't know | 14 | 12,96% | 8,00% |

| Integrate resource efficiency and eco-innovation as cross-cutting objectives for the business to business (B2B) and cluster to cluster (C2C) matchmaking events organised by EEN | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(108) | % of total number records(175) |
| Very effective | 32 | 29,63% | 18,29% |
| Rather effective | 44 | 40,74% | 25,14% |
| Not very effective | 13 | 12,04% | 7,43% |
| Not at all effective | 2 | 1,85% | 1,14% |

| | | | |
|---|---|---|---|
| Don't know | 17 | 15,74% | 9,71% |

| Coaching and training resource efficiency experts across EEN | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(108) | % of total number records(175) |
| Very effective | 33 | 30,56% | 18,86% |
| Rather effective | 39 | 36,11% | 22,29% |
| Not very effective | 12 | 11,11% | 6,86% |
| Not at all effective | 7 | 6,48% | 4,00% |
| Don't know | 17 | 15,74% | 9,71% |

| Strategic collaboration on resource efficiency between the Enterprise Europe Network and other key partners (e.g., other business organisations, clusters, European Institute of Innovation and Technology, Knowledge Alliances or Sector Skill Alliances with a focus on resource efficiency...) | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(108) | % of total number records(175) |
| Very effective | 38 | 35,19% | 21,71% |
| Rather effective | 38 | 35,19% | 21,71% |
| Not very effective | 13 | 12,04% | 7,43% |
| Not at all effective | 5 | 4,63% | 2,86% |
| Don't know | 14 | 12,96% | 8,00% |

## 3.Access to finance

| (For SME respondents only): Have you tried to estimate the costs of investments to improve your resource efficiency? (please, tick one)[16] | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(175) | % of total number records(175) |
| No, I haven't tried because I assumed it was too complicated | 53 | 30,29% | 30,29% |
| No, I never thought of estimating such investments | 62 | 35,43% | 35,43% |
| Yes, I estimated the costs by myself | 37 | 21,14% | 21,14% |
| Yes, but I used a self- assessment tool on how resource efficient is my company with respect to others | 8 | 4,57% | 4,57% |
| Yes, but I got help from experts | 15 | 8,57% | 8,57% |

## How effective are the actions implemented in your region/country to estimate the costs of resource efficiency investments?

| a. Advice from peer companies | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(175) | % of total number records(175) |

[16] 3 non-SME respondents have asked to have their answers disregarded due to the question being compulsory. However, this has no bearing on the overall statistical results.

| | | | |
|---|---|---|---|
| Very effective | 7 | 4,00% | 4,00% |
| Rather effective | 62 | 35,43% | 35,43% |
| Not very effective | 41 | 23,43% | 23,43% |
| Not at all effective | 16 | 9,14% | 9,14% |
| Don't know | 49 | 28,00% | 28,00% |

b. Advisory and consultancy services

| | Number of requested records | % Requested records(175) | % of total number records(175) |
|---|---|---|---|
| Very effective | 27 | 15,43% | 15,43% |
| Rather effective | 53 | 30,29% | 30,29% |
| Not very effective | 44 | 25,14% | 25,14% |
| Not at all effective | 10 | 5,71% | 5,71% |
| Don't know | 41 | 23,43% | 23,43% |

c. Self-assessment tool enabling a company to calculate return on investments

| | Number of requested records | % Requested records(175) | % of total number records(175) |
|---|---|---|---|
| Very effective | 17 | 9,71% | 9,71% |
| Rather effective | 39 | 22,29% | 22,29% |
| Not very effective | 48 | 27,43% | 27,43% |
| Not at all effective | 19 | 10,86% | 10,86% |
| Don't know | 52 | 29,71% | 29,71% |

## Which are the most important barriers to obtain financing for investments on resource efficiency ?

Investments are too risky

| | Number of requested records | % Requested records(175) | % of total number records(175) |
|---|---|---|---|
| Very important | 26 | 14,86% | 14,86% |
| Rather important | 67 | 38,29% | 38,29% |
| Not very important | 42 | 24,00% | 24,00% |
| Not at all important | 11 | 6,29% | 6,29% |
| Don’t know | 29 | 16,57% | 16,57% |

The financial return is not high enough

| | Number of requested records | % Requested records(175) | % of total number records(175) |
|---|---|---|---|
| Very important | 45 | 25,71% | 25,71% |
| Rather important | 65 | 37,14% | 37,14% |
| Not very important | 37 | 21,14% | 21,14% |
| Not at all important | 4 | 2,29% | 2,29% |
| Don’t know | 24 | 13,71% | 13,71% |

The investments on resource efficiency take too long to be financially viable

| | Number of requested records | % Requested records(175) | % of total number records(175) |
|---|---|---|---|
| Very important | 62 | 35,43% | 35,43% |
| Rather important | 64 | 36,57% | 36,57% |
| Not very important | 23 | 13,14% | 13,14% |
| Not at all important | 5 | 2,86% | 2,86% |
| Don't know | 21 | 12,00% | 12,00% |

Finance providers lack a sufficient understanding of resource efficiency investments

| | Number of requested records | % Requested records(175) | % of total number records(175) |
|---|---|---|---|
| Very important | 61 | 34,86% | 34,86% |
| Rather important | 64 | 36,57% | 36,57% |
| Not very important | 15 | 8,57% | 8,57% |
| Not at all important | 7 | 4,00% | 4,00% |
| Don't know | 28 | 16,00% | 16,00% |

Investments are too complex

| | Number of requested records | % Requested records(175) | % of total number records(175) |
|---|---|---|---|
| Very important | 28 | 16,00% | 16,00% |
| Rather important | 63 | 36,00% | 36,00% |
| Not very important | 49 | 28,00% | 28,00% |
| Not at all important | 8 | 4,57% | 4,57% |
| Don't know | 27 | 15,43% | 15,43% |

Investments are too small

| | Number of requested records | % Requested records(175) | % of total number records(175) |
|---|---|---|---|
| Very important | 19 | 10,86% | 10,86% |
| Rather important | 39 | 22,29% | 22,29% |
| Not very important | 51 | 29,14% | 29,14% |
| Not at all important | 24 | 13,71% | 13,71% |
| Don't know | 42 | 24,00% | 24,00% |

## Which are the most effective measures to overcome the barriers to resource efficiency investments?

Instruments to decrease the risks of projects (such as loan guarantees)

| | Number of requested records | % Requested records(175) | % of total number records(175) |
|---|---|---|---|
| Very effective | 56 | 32,00% | 32,00% |
| Rather effective | 67 | 38,29% | 38,29% |
| Not very effective | 20 | 11,43% | 11,43% |
| Not at all effective | 5 | 2,86% | 2,86% |
| Don't know | 27 | 15,43% | 15,43% |

| Awareness raising for the financial sector on resource efficiency | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(175) | % of total number records(175) |
| Very effective | 56 | 32,00% | 32,00% |
| Rather effective | 53 | 30,29% | 30,29% |
| Not very effective | 34 | 19,43% | 19,43% |
| Not at all effective | 4 | 2,29% | 2,29% |
| Don't know | 28 | 16,00% | 16,00% |

| Third party resource efficiency audit demonstrating the interest of the project | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(175) | % of total number records(175) |
| Very effective | 30 | 17,14% | 17,14% |
| Rather effective | 71 | 40,57% | 40,57% |
| Not very effective | 41 | 23,43% | 23,43% |
| Not at all effective | 6 | 3,43% | 3,43% |
| Don't know | 27 | 15,43% | 15,43% |

| Project bundling, bringing together several small projects for resource efficiency to have a large one | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(175) | % of total number records(175) |
| Very effective | 35 | 20,00% | 20,00% |
| Rather effective | 63 | 36,00% | 36,00% |
| Not very effective | 32 | 18,29% | 18,29% |
| Not at all effective | 12 | 6,86% | 6,86% |
| Don't know | 33 | 18,86% | 18,86% |

| Specific financing lines for resource efficiency projects | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(175) | % of total number records(175) |
| Very effective | 80 | 45,71% | 45,71% |
| Rather effective | 53 | 30,29% | 30,29% |
| Not very effective | 10 | 5,71% | 5,71% |
| Not at all effective | 0 | 0,00% | 0,00% |
| Don't know | 32 | 18,29% | 18,29% |

## 4. Supporting SMEs in a greener value chain

### At which level are actions in support of resource efficiency more important? (Please tick boxes)

| a. At company level | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(175) | % of total number records(175) |
| Very important | 101 | 57,71% | 57,71% |

| | | | |
|---|---|---|---|
| Rather important | 60 | 34,29% | 34,29% |
| Not very important | 3 | 1,71% | 1,71% |
| Not at all important | 3 | 1,71% | 1,71% |
| Don't know | 8 | 4,57% | 4,57% |

b. Along the whole value chain

| | Number of requested records | % Requested records(175) | % of total number records(175) |
|---|---|---|---|
| Very important | 90 | 51,43% | 51,43% |
| Rather important | 63 | 36,00% | 36,00% |
| Not very important | 12 | 6,86% | 6,86% |
| Not at all important | 1 | 0,57% | 0,57% |
| Don't know | 9 | 5,14% | 5,14% |

c. At certain stages along the value chain

| | Number of requested records | % Requested records(175) | % of total number records(175) |
|---|---|---|---|
| Very important | 59 | 33,71% | 33,71% |
| Rather important | 76 | 43,43% | 43,43% |
| Not very important | 20 | 11,43% | 11,43% |
| Not at all important | 4 | 2,29% | 2,29% |
| Don't know | 16 | 9,14% | 9,14% |

## At what stages of the value chain is support for resource efficiency more important?

Extraction of raw materials

| | Number of requested records | % Requested records(175) | % of total number records(175) |
|---|---|---|---|
| Very important | 68 | 38,86% | 38,86% |
| Rather important | 70 | 40,00% | 40,00% |
| Not very important | 18 | 10,29% | 10,29% |
| Not at all important | 3 | 1,71% | 1,71% |
| Don't know | 16 | 9,14% | 9,14% |

Processing of raw materials

| | Number of requested records | % Requested records(175) | % of total number records(175) |
|---|---|---|---|
| Very important | 84 | 48,00% | 48,00% |
| Rather important | 65 | 37,14% | 37,14% |
| Not very important | 12 | 6,86% | 6,86% |
| Not at all important | 2 | 1,14% | 1,14% |
| Don't know | 12 | 6,86% | 6,86% |

Design

| | Number of requested records | % Requested records(175) | % of total number records(175) |
|---|---|---|---|

| | | | |
|---|---|---|---|
| Very important | 78 | 44,57% | 44,57% |
| Rather important | 53 | 30,29% | 30,29% |
| Not very important | 25 | 14,29% | 14,29% |
| Not at all important | 3 | 1,71% | 1,71% |
| Don't know | 16 | 9,14% | 9,14% |

| Inbound logistics | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(175) | % of total number records(175) |
| Very important | 34 | 19,43% | 19,43% |
| Rather important | 68 | 38,86% | 38,86% |
| Not very important | 45 | 25,71% | 25,71% |
| Not at all important | 9 | 5,14% | 5,14% |
| Don't know | 19 | 10,86% | 10,86% |

| Production operations | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(175) | % of total number records(175) |
| Very important | 89 | 50,86% | 50,86% |
| Rather important | 63 | 36,00% | 36,00% |
| Not very important | 12 | 6,86% | 6,86% |
| Not at all important | 0 | 0,00% | 0,00% |
| Don't know | 11 | 6,29% | 6,29% |

| Outbound logistics | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(175) | % of total number records(175) |
| Very important | 40 | 22,86% | 22,86% |
| Rather important | 67 | 38,29% | 38,29% |
| Not very important | 43 | 24,57% | 24,57% |
| Not at all important | 5 | 2,86% | 2,86% |
| Don't know | 20 | 11,43% | 11,43% |

| Marketing and sales | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(175) | % of total number records(175) |
| Very important | 35 | 20,00% | 20,00% |
| Rather important | 55 | 31,43% | 31,43% |
| Not very important | 55 | 31,43% | 31,43% |
| Not at all important | 12 | 6,86% | 6,86% |
| Don't know | 18 | 10,29% | 10,29% |

| Repairing and maintenance of the product | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(175) | % of total number records(175) |
| Very important | 55 | 31,43% | 31,43% |
| Rather important | 65 | 37,14% | 37,14% |
| Not very important | 32 | 18,29% | 18,29% |

| | | | |
|---|---|---|---|
| Not at all important | 5 | 2,86% | 2,86% |
| Don't know | 18 | 10,29% | 10,29% |

| Recycling | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(175) | % of total number records(175) |
| Very important | 115 | 65,71% | 65,71% |
| Rather important | 36 | 20,57% | 20,57% |
| Not very important | 9 | 5,14% | 5,14% |
| Not at all important | 5 | 2,86% | 2,86% |
| Don't know | 10 | 5,71% | 5,71% |

| Waste management | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(175) | % of total number records(175) |
| Very important | 110 | 62,86% | 62,86% |
| Rather important | 46 | 26,29% | 26,29% |
| Not very important | 5 | 2,86% | 2,86% |
| Not at all important | 4 | 2,29% | 2,29% |
| Don't know | 10 | 5,71% | 5,71% |

## Who is the most important driver for more resource efficiency within the value chain?

| a. Large companies | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(175) | % of total number records(175) |
| Very important | 103 | 58,86% | 58,86% |
| Rather important | 56 | 32,00% | 32,00% |
| Not very important | 5 | 2,86% | 2,86% |
| Not at all important | 1 | 0,57% | 0,57% |
| Don't know | 10 | 5,71% | 5,71% |

| b. SMEs | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(175) | % of total number records(175) |
| Very important | 75 | 42,86% | 42,86% |
| Rather important | 80 | 45,71% | 45,71% |
| Not very important | 10 | 5,71% | 5,71% |
| Not at all important | 1 | 0,57% | 0,57% |
| Don't know | 9 | 5,14% | 5,14% |

| c. Third-party intermediaries offering services in the value chain | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(175) | % of total number records(175) |
| Very important | 43 | 24,57% | 24,57% |
| Rather important | 80 | 45,71% | 45,71% |

| | | | |
|---|---|---|---|
| Not very important | 28 | 16,00% | 16,00% |
| Not at all important | 6 | 3,43% | 3,43% |
| Don't know | 18 | 10,29% | 10,29% |

**Among the intermediaries, who are the most important drivers for more resource efficiency within the value chain?**

a. Service providers/consultants

| | Number of requested records | % Requested records(175) | % of total number records(175) |
|---|---|---|---|
| Very important | 48 | 27,43% | 27,43% |
| Rather important | 79 | 45,14% | 45,14% |
| Not very important | 30 | 17,14% | 17,14% |
| Not at all important | 4 | 2,29% | 2,29% |
| Don't know | 14 | 8,00% | 8,00% |

b. Cluster organisations

| | Number of requested records | % Requested records(175) | % of total number records(175) |
|---|---|---|---|
| Very important | 44 | 25,14% | 25,14% |
| Rather important | 74 | 42,29% | 42,29% |
| Not very important | 29 | 16,57% | 16,57% |
| Not at all important | 8 | 4,57% | 4,57% |
| Don't know | 20 | 11,43% | 11,43% |

c. Business organisation

| | Number of requested records | % Requested records(175) | % of total number records(175) |
|---|---|---|---|
| Very important | 52 | 29,71% | 29,71% |
| Rather important | 70 | 40,00% | 40,00% |
| Not very important | 33 | 18,86% | 18,86% |
| Not at all important | 5 | 2,86% | 2,86% |
| Don't know | 15 | 8,57% | 8,57% |

d. National administrations

| | Number of requested records | % Requested records(175) | % of total number records(175) |
|---|---|---|---|
| Very important | 66 | 37,71% | 37,71% |
| Rather important | 47 | 26,86% | 26,86% |
| Not very important | 42 | 24,00% | 24,00% |
| Not at all important | 6 | 3,43% | 3,43% |
| Don't know | 14 | 8,00% | 8,00% |

e. Regional/local administrations

| | Number of requested records | % Requested records(175) | % of total number records(175) |
|---|---|---|---|
| Very important | 70 | 40,00% | 40,00% |

| | | | |
|---|---|---|---|
| Rather important | 48 | 27,43% | 27,43% |
| Not very important | 38 | 21,71% | 21,71% |
| Not at all important | 7 | 4,00% | 4,00% |
| Don't know | 12 | 6,86% | 6,86% |

| f. Development and innovation agencies | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(175) | % of total number records(175) |
| Very important | 49 | 28,00% | 28,00% |
| Rather important | 70 | 40,00% | 40,00% |
| Not very important | 33 | 18,86% | 18,86% |
| Not at all important | 5 | 2,86% | 2,86% |
| Don't know | 18 | 10,29% | 10,29% |

| g. Technological centres | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(175) | % of total number records(175) |
| Very important | 57 | 32,57% | 32,57% |
| Rather important | 81 | 46,29% | 46,29% |
| Not very important | 18 | 10,29% | 10,29% |
| Not at all important | 6 | 3,43% | 3,43% |
| Don't know | 13 | 7,43% | 7,43% |

| h. Research organisations | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(175) | % of total number records(175) |
| Very important | 50 | 28,57% | 28,57% |
| Rather important | 72 | 41,14% | 41,14% |
| Not very important | 32 | 18,29% | 18,29% |
| Not at all important | 5 | 2,86% | 2,86% |
| Don't know | 16 | 9,14% | 9,14% |

| i. Educational establishment | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(175) | % of total number records(175) |
| Very important | 50 | 28,57% | 28,57% |
| Rather important | 59 | 33,71% | 33,71% |
| Not very important | 40 | 22,86% | 22,86% |
| Not at all important | 12 | 6,86% | 6,86% |
| Don't know | 14 | 8,00% | 8,00% |

| j. Non-governmental organisations (NGOs) | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(175) | % of total number records(175) |
| Very important | 21 | 12,00% | 12,00% |
| Rather important | 46 | 26,29% | 26,29% |
| Not very important | 60 | 34,29% | 34,29% |
| Not at all important | 25 | 14,29% | 14,29% |

| | | | |
|---|---|---|---|
| Don't know | 23 | 13,14% | 13,14% |

| k. Industrial symbiosis 'matchmaking' | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(175) | % of total number records(175) |
| Very important | 33 | 18,86% | 18,86% |
| Rather important | 60 | 34,29% | 34,29% |
| Not very important | 41 | 23,43% | 23,43% |
| Not at all important | 7 | 4,00% | 4,00% |
| Don't know | 34 | 19,43% | 19,43% |

## 5. New business opportunities in a greener economy

| In your opinion, how important is the role that environmental labels play in facilitating access to markets for green products and services, notably for SMEs? | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(175) | % of total number records(175) |
| Very important | 53 | 30,29% | 30,29% |
| Rather important | 78 | 44,57% | 44,57% |
| Not very important | 33 | 18,86% | 18,86% |
| Not at all important | 2 | 1,14% | 1,14% |
| Don't know | 9 | 5,14% | 5,14% |

| At regional level, SMEs' proximity to customers saves energy and costs and contributes to enhancing local production. The promotion of local creation and closer links between local activities may help SMEs and, in particular, crafts, to come back into the value chain. Are you aware of any local/regional policy strategy mobilising all interested actors towards a more resource-efficient and low carbon economy in the region? | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(175) | % of total number records(175) |
| Yes | 70 | 40,00% | 40,00% |
| No | 58 | 33,14% | 33,14% |
| Don't know | 47 | 26,86% | 26,86% |

| Do you think that this policy strategy is effectively helping to promote local creation and businesses? | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(70) | % of total number records(175) |
| Yes | 51 | 72,86% | 29,14% |
| No | 9 | 12,86% | 5,14% |
| Don't know | 10 | 14,29% | 5,71% |

## 6. SMEs selling green products and services abroad

The EU makes up roughly one third of the world market for environmental industries and a major exporter in a rapidly growing market. However, few SMEs in the EU offer their green technologies, products or services in countries outside the EU and most – 87% - do only sell in their national

| markets. Are SMEs, in your opinion, genuinely interested in selling green products and/or services on international markets? | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(175) | % of total number records(175) |
| Very interested | 51 | 29,14% | 29,14% |
| Rather interested | 78 | 44,57% | 44,57% |
| Not very interested | 34 | 19,43% | 19,43% |
| Not at all interested | 1 | 0,57% | 0,57% |
| Don't know | 11 | 6,29% | 6,29% |

## Which are the most effective support actions to help SMEs to promote their green products and/or services in global markets?

| Pre-market entry support (basic research and market intelligence, finance planning, personnel identification, understanding local business culture, identifying suitable locations) | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(175) | % of total number records(175) |
| Very effective | 76 | 43,43% | 43,43% |
| Rather effective | 71 | 40,57% | 40,57% |
| Not very effective | 14 | 8,00% | 8,00% |
| Not at all effective | 2 | 1,14% | 1,14% |
| Don't know | 12 | 6,86% | 6,86% |

| Trade missions | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(175) | % of total number records(175) |
| Very effective | 36 | 20,57% | 20,57% |
| Rather effective | 78 | 44,57% | 44,57% |
| Not very effective | 40 | 22,86% | 22,86% |
| Not at all effective | 1 | 0,57% | 0,57% |
| Don't know | 20 | 11,43% | 11,43% |

| Identifying potential foreign business partners | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(175) | % of total number records(175) |
| Very effective | 68 | 38,86% | 38,86% |
| Rather effective | 76 | 43,43% | 43,43% |
| Not very effective | 18 | 10,29% | 10,29% |
| Not at all effective | 2 | 1,14% | 1,14% |
| Don't know | 11 | 6,29% | 6,29% |

| Exhibiting in international trade fairs | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(175) | % of total number records(175) |
| Very effective | 40 | 22,86% | 22,86% |
| Rather effective | 75 | 42,86% | 42,86% |
| Not very effective | 46 | 26,29% | 26,29% |
| Not at all effective | 3 | 1,71% | 1,71% |

| | | | |
|---|---|---|---|
| Don't know | 11 | 6,29% | 6,29% |

| Business cooperation and networking, matchmaking events, e.g. one-to-one meetings with enterprises | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(175) | % of total number records(175) |
| Very effective | 71 | 40,57% | 40,57% |
| Rather effective | 75 | 42,86% | 42,86% |
| Not very effective | 17 | 9,71% | 9,71% |
| Not at all effective | 0 | 0,00% | 0,00% |
| Don't know | 12 | 6,86% | 6,86% |

| Dealing with national technical standards, rules and regulations, Intellectual Property Rights (IPR) | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(175) | % of total number records(175) |
| Very effective | 52 | 29,71% | 29,71% |
| Rather effective | 71 | 40,57% | 40,57% |
| Not very effective | 35 | 20,00% | 20,00% |
| Not at all effective | 2 | 1,14% | 1,14% |
| Don't know | 15 | 8,57% | 8,57% |

| Business or professional advice (e.g. from lawyers, accountants) | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(175) | % of total number records(175) |
| Very effective | 36 | 20,57% | 20,57% |
| Rather effective | 76 | 43,43% | 43,43% |
| Not very effective | 38 | 21,71% | 21,71% |
| Not at all effective | 6 | 3,43% | 3,43% |
| Don't know | 19 | 10,86% | 10,86% |

| Temporary office facilities in target market | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(175) | % of total number records(175) |
| Very effective | 24 | 13,71% | 13,71% |
| Rather effective | 78 | 44,57% | 44,57% |
| Not very effective | 43 | 24,57% | 24,57% |
| Not at all effective | 7 | 4,00% | 4,00% |
| Don't know | 23 | 13,14% | 13,14% |

| Assistance post-market entry in different stages of market development (e.g. incubation, identifying financial support, press releases, innovation support, technology transfer) | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(175) | % of total number records(175) |
| Very effective | 53 | 30,29% | 30,29% |
| Rather effective | 76 | 43,43% | 43,43% |
| Not very effective | 23 | 13,14% | 13,14% |
| Not at all effective | 4 | 2,29% | 2,29% |
| Don't know | 19 | 10,86% | 10,86% |

| Online information portal for EU SMEs (provision of up to date and consistent information on 'Doing Business In…') | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(175) | % of total number records(175) |
| Very effective | 38 | 21,71% | 21,71% |
| Rather effective | 59 | 33,71% | 33,71% |
| Not very effective | 53 | 30,29% | 30,29% |
| Not at all effective | 7 | 4,00% | 4,00% |
| Don't know | 18 | 10,29% | 10,29% |

| Coaching (e.g. negotiation skills) | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(175) | % of total number records(175) |
| Very effective | 26 | 14,86% | 14,86% |
| Rather effective | 81 | 46,29% | 46,29% |
| Not very effective | 43 | 24,57% | 24,57% |
| Not at all effective | 4 | 2,29% | 2,29% |
| Don't know | 21 | 12,00% | 12,00% |

| Easing access to local finance | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(175) | % of total number records(175) |
| Very effective | 70 | 40,00% | 40,00% |
| Rather effective | 69 | 39,43% | 39,43% |
| Not very effective | 18 | 10,29% | 10,29% |
| Not at all effective | 2 | 1,14% | 1,14% |
| Don't know | 16 | 9,14% | 9,14% |

## Who can provide services for the internationalisation of green products or services more effectively?

| Cluster organisations | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(175) | % of total number records(175) |
| Very effective | 46 | 26,29% | 26,29% |
| Rather effective | 82 | 46,86% | 46,86% |
| Not very effective | 30 | 17,14% | 17,14% |
| Not at all effective | 4 | 2,29% | 2,29% |
| Don't know | 13 | 7,43% | 7,43% |

| Business organisations | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(175) | % of total number records(175) |
| Very effective | 77 | 44,00% | 44,00% |
| Rather effective | 61 | 34,86% | 34,86% |
| Not very effective | 23 | 13,14% | 13,14% |
| Not at all effective | 5 | 2,86% | 2,86% |

| | | | |
|---|---|---|---|
| Don't know | 9 | 5,14% | 5,14% |

| Public administrations | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(175) | % of total number records(175) |
| Very effective | 30 | 17,14% | 17,14% |
| Rather effective | 66 | 37,71% | 37,71% |
| Not very effective | 56 | 32,00% | 32,00% |
| Not at all effective | 16 | 9,14% | 9,14% |
| Don't know | 7 | 4,00% | 4,00% |

| Development agencies | | | |
|---|---|---|---|
| | Number of requested records | % Requested records(175) | % of total number records(175) |
| Very effective | 43 | 24,57% | 24,57% |
| Rather effective | 75 | 42,86% | 42,86% |
| Not very effective | 34 | 19,43% | 19,43% |
| Not at all effective | 6 | 3,43% | 3,43% |
| Don't know | 17 | 9,71% | 9,71% |