Flash Eurobarometer

European Commission

EUROBAROMETER

Attitudes of European entrepreneurs towards eco-innovation

Analytical report

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Flash Eurobarometer 315 – *The Gallup Organization*

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Attitudes of European entrepreneurs towards eco-innovation

Survey conducted by The Gallup Organization, Hungary upon the request of Directorate-General Environment

Coordinated by Directorate-General Communication

THE GALLUP ORGANIZATION

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Introduction

The objective of the Flash Eurobarometer survey – *"FL315 Attitudes of European entrepreneurs towards eco-innovation*" was to investigate the behaviour, attitudes and expectations of entrepreneurs towards the development and uptake of eco-innovation as a response to rising prices of resources and resource scarcity.

Eco-innovation *is the introduction of any new or significantly improved product (good or service), process, organisational change or marketing solution that reduces the use of natural resources (including materials, energy, water and land) and decreases the release of harmful substances across the whole life-cycle.*[1]

In this Flash Eurobarometer survey (N° 315), a total of 5,222 managers of SMEs (small and medium-sized companies) in the 27 EU Member States were interviewed by telephone between 24 January and 1 February 2011. A sample of SMEs was randomly selected in each country within certain activity sectors (NACE Rev 2.0):

- A: Agriculture, forestry and fishing
- C: Manufacturing
- E: Water supply, sewerage, waste management and remediation activities
- F: Construction
- I – 56: Food and beverage service activities

The targeted number of interviews varied dependent on the size of the country. In most countries, the targeted sample size was 200. However, in France, Germany, Italy, Spain and the UK, the sample size was increased to 250, while in Cyprus, Luxembourg and Malta, the sample size was reduced to 50.

In this report, results are discussed in terms of the EU average, followed by a discussion of the results at an individual country level. Differences in entrepreneurs' behaviour and attitudes will also be studied in terms of the following company characteristics:

- *Company size:* small (10-49 employees), medium (50-249 employees)
- *Annual turnover:* up to €2 million, €2-10 million, €10-50 million, more than €50 million
- *Change in turnover over the past two years:* increased, decreased, remained unchanged
- *Sector of activity:* agriculture, industry, construction, water supply and waste management, food service activities.

More details about these company characteristics can be found in annex tables 1a through 7b.

[1] Source: Eco-Innovation Observatory, Methodological Report 2010

Main findings

- The survey covered small and medium-sized companies in a number of sectors (agricultural, construction, manufacturing, water supply and waste management, and food services).

Findings related to cost of materials

- Almost a quarter of managers said that 50% or more of their company's total costs consisted of the **cost of materials**. About 3 in 10 respondents said that these material costs represented between 30% and 49% of their company's gross production value.
- Companies with a high annual turnover were more likely to be material-intensive; for example, a third of companies with an annual turnover of more than €50 million reported that 50% or more of their total production value was represented by material costs.
- Three-quarters of businesses had experienced an **increase in material costs in the past five years**; 26% of respondents said material costs for their company had increased *dramatically* and 49% said there had been a *moderate* increase in such costs.
- In Germany, Poland, Malta and the UK, more than 80% of respondents answered that material costs for their company had *increased moderately* or *dramatically* in the past five years.
- Respondents in the water supply and waste management, and agriculture sectors were more likely than their counterparts in other sectors to say that material costs had *moderately* or *dramatically increased* for their company in the past five years.
- Almost 9 in 10 interviewees said they **foresaw price increases for materials** in the coming 5 to 10 years; similar figures were seen in almost all countries and in all types of companies.
- Over three-quarters of respondents answered that many of **the materials they used came from (or originated from) their own country**, while half as many respondents said that they came from other EU countries. For all types of companies, many of the materials were sourced domestically.
- In order to **reduce material costs**, 56% of companies had purchased more efficient technologies in the past five years, while 53% had developed more efficient technologies in-house during that time frame. A similar proportion (52%) mentioned recycling practices.
- Across all countries, some of the largest proportions of respondents mentioned having introduced material-efficient technologies in the past five years (i.e. they purchased such technologies and/or developed them in-house).
- Almost 9 in 10 companies had introduced at least one change in the past five years in order to reduce material costs; at the individual country level, this proportion ranged from 76% in Sweden to 98% in Greece.

Eco-innovative activities

- Just over a third of companies reported that less than 10% of **their innovation investments in the past five years were related to eco-innovation** and a quarter estimated that this share was between 10% and 29%.
- In just six countries, more than a fifth of respondents estimated that 30% of their innovation investments were eco-related: Sweden (21%), Greece (22%), Austria (23%), Cyprus and Luxembourg (both 24%) and Poland (30%).
- Companies that had made the largest share of eco-innovation investments were more likely to be found in the water supply and waste management, and agriculture sectors.
- Roughly 3 in 10 companies in the EU had **introduced a new or significantly improved eco-innovative production process or method** in the past two years, while roughly a quarter had introduced a new or significantly improved eco-innovative **organisational method**. A similar proportion (25%) had introduced a new or significantly improved eco-innovative **product or service** on the market.

- Medium-sized companies, companies with an annual turnover between €10 and €50 million and those that had grown in terms of turnover in the past two years were more likely to have introduced these types of eco-innovation.
- Among companies that had introduced at least one type of eco-innovation in the past two years, the largest number (42%) said that such eco-innovation had led to **a reduction in material use** of between 5% and 19% per unit of output, while roughly a third estimated that the reduction in material use had been less than 5% per unit of output.

Barriers to an accelerated uptake of eco-innovation

- Fourteen potential barriers were presented to interviewees and they were asked, for each one, whether they considered these to be a serious barrier or not to a faster uptake of eco-innovation in their company.
- For each of the **potential barriers** related to **financing and funds**, a majority of respondents thought that it was a *very* or *somewhat serious* barrier to an accelerated development and uptake of eco-innovation. For example, insufficient access to existing subsidies and fiscal incentives was considered a barrier by 6 in 10 respondents (30% "very serious" and 30% "somewhat serious" responses).
- Two-thirds of managers said that the **uncertain demand from the market** was a barrier to a faster uptake of eco-innovation in their company (34% "very serious" and 33% "somewhat serious" responses).
- For most of the barriers listed in the survey, respondents in small companies (in terms of workforce or annual turnover) were more likely than those in medium-size companies to describe the barrier presented to them as being *very serious* or *somewhat serious*.
- In terms of main activities, companies in the agriculture sector were the most likely to describe various obstacles as being *very serious* or *somewhat serious*, while those in the water supply and waste management, and food services sectors were frequently less likely to do so.

Drivers for an accelerated uptake of eco-innovation

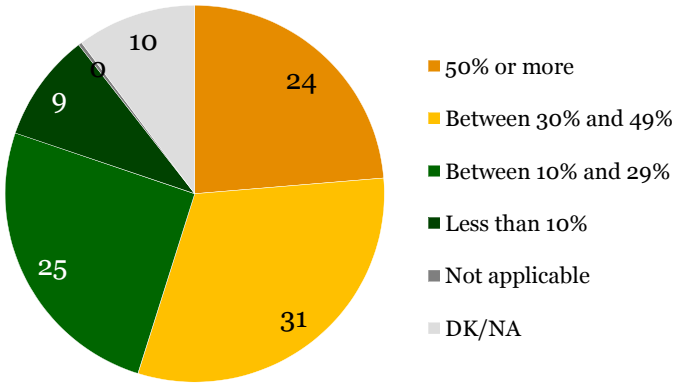
- Managers were also presented with 14 potential drivers and were asked, for each, whether they considered these to be important or not for a faster uptake of eco-innovation in their company.
- For 10 of the 14 drivers listed, more than 70% of respondents said that it was a *very* or *somewhat important* driver of eco-innovation uptake and development in their company. A larger variation was seen in the proportion of "very important" responses.
- One in two respondents considered current **high energy prices** to be a *very important* driver to accelerate eco-innovation uptake and development in their company and a similar proportion (52%) said the same about the expected *future* increases in energy prices.
- Although 45% of respondents also thought that **current high material prices** were a *very important* driver of eco-innovation uptake in their company, the proportion saying the same about **limited access to materials** was considerably lower – at 30%.
- Of the 14 drivers listed in the survey, *current* and *future* high energy prices were mentioned most frequently as being *very important* drivers of accelerated eco-innovation uptake in respondents' companies.

1. Companies' material costs

1.1 Material costs as a percentage of "total costs"

Almost a quarter (24%) of managers said that 50% or more of their company's "total costs" (gross production value) consisted of "material costs" – i.e. all costs for materials used to manufacture a product or perform a service. About 3 in 10 (31%) respondents said that material costs represented between 30% and 49% of their company's gross production value, while a quarter estimated that between 10% and 29% of total costs were accounted for by material costs. Finally, roughly a tenth (9%) of respondents said that the cost of materials represented less than 10% of all costs.

Cost of materials as a percentage of companies' total costs



Q1. What percentage of your company's total cost - i.e. gross production value - is material cost?
Base: all companies, % EU27

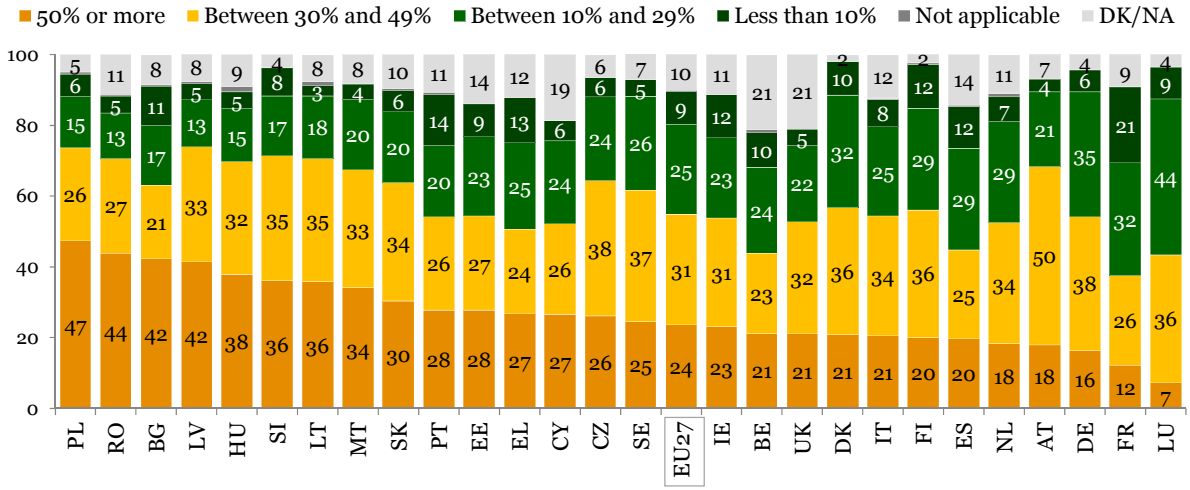
Country variations

In Poland, almost half (47%) of the companies surveyed stated that material costs represented 50% or more of their total production value. In three other countries, more than 4 in 10 respondents gave a similar response: Romania (44%), Bulgaria and Latvia (both 42%). In these four countries, a fifth – or more – of the companies reported that between 30% and 49% of "total costs" were costs of materials (from 21% in Bulgaria to 33% in Latvia).

In France, Luxembourg, Belgium and Spain, less than half of respondents answered that 30% or more of their company's "total costs" consisted of "material costs". For example, in Luxembourg, more than a third (36%) of respondents said that material costs represented between 30% and 49% of their company's gross production value, while just 7% estimated that these costs represented 50% or more of the total. For French companies, the corresponding figures were 26% and 12%, respectively. In France, about a fifth (21%) of respondents answered that less than 10% of their company's total costs were material costs; in most other countries, however, less than 10% of respondents gave a similar response.

In some countries, a considerable proportion of respondents found it difficult to estimate what percentage of their company's total costs consisted of material costs. The proportions of such "don't know" responses were the highest in the UK and Belgium (both 21%).

Cost of materials as a percentage of a companies' total costs



Q1. What percentage of your company's total cost - i.e. gross production value - is material cost?
Base: all companies, % by country

Company characteristics

Roughly a quarter (23%-27%) of agricultural, construction and manufacturing companies reported that 50% or more of their total production value was due to material costs; this proportion was lower in the water supply and waste management, and food services sectors (14% and 10%, respectively). A similar picture emerged when looking at the proportions saying that the percentage of material costs was between 30% and 49% (from 13% in "water supply and waste management" to 33% in "construction").

The food services sector had the largest proportion of respondents answering that material costs represented between 10% and 29% of their company's gross production value (39% vs. 24% in the construction and manufacture sectors). In the water supply and waste management sector, respondents were most likely to say that that the share of these sorts of costs was less than 10% (29% vs. 8%-10% in all other sectors).

Companies with a high annual turnover were more likely to be material-intensive. For example, 33% of companies with an annual turnover of more than €50 million reported that 50% or more of their total production value was represented by material costs; the corresponding figure for companies with an annual turnover of less than €2 million was 22%. Six in 10 respondents in the latter type of company said that material costs represented between 10% and 49% of their company's gross production value, compared to only half as many respondents in the former type of company (32%).

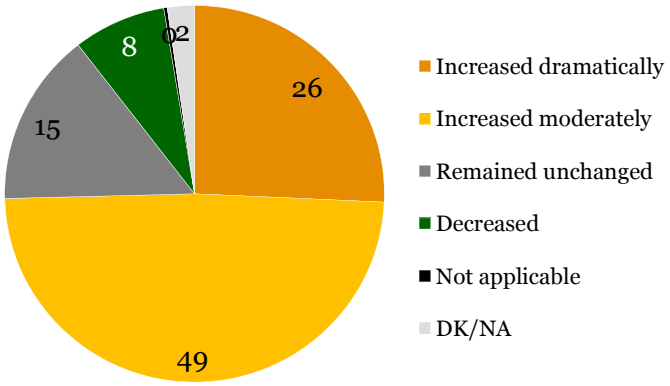
For more details, see annex table 8b.

1.2 Changes in companies' material costs

Three-quarters of businesses had experienced an increase in material costs in the past five years; 26% of respondents said material costs for their company had increased *dramatically* and 49% said there had been a *moderate* increase in such costs.

About one in seven (15%) managers answered that their company's material costs had remained unchanged in the past five years and almost a tenth (8%) said that such costs had decreased in that time frame.

How companies' material costs have evolved over 5 years



Q2. Have material costs for your company increased or decreased in the past 5 years?
Base: all companies, % EU27

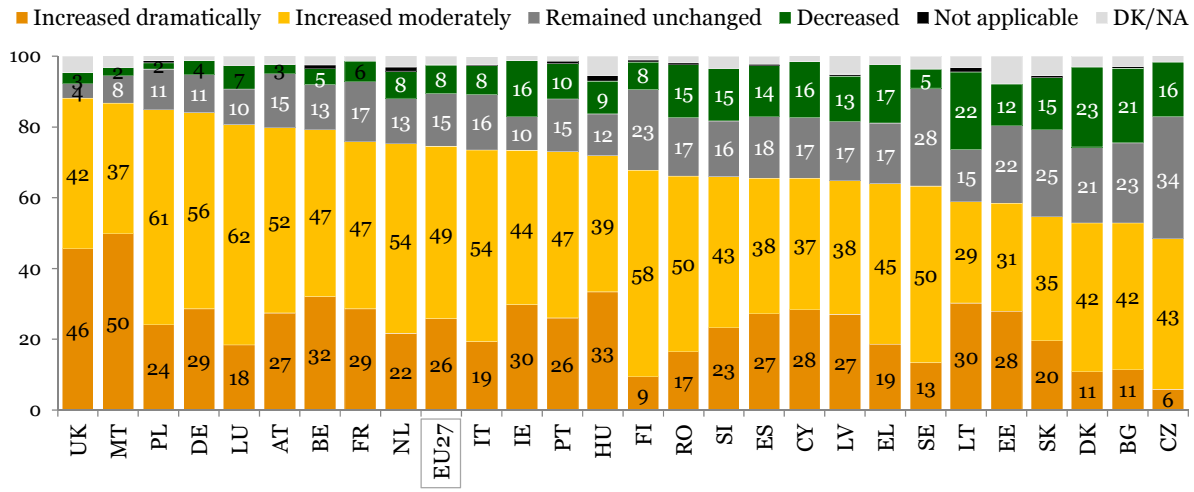
Country variations

In Germany, Poland, Malta and the UK, more than 80% of respondents answered that material costs for their company had *increased moderately* or *dramatically* in the past five years (between 85% and 88%). The proportion of businesses that had experienced material cost increases was also higher than 50% in almost all other EU Member States; the only exception was the Czech Republic where 49% of respondents said that their company had seen an increase in material costs in the past five years.

Focusing solely on companies that had experienced a *dramatic increase* in material costs in the past five years, it was noted that the proportions of such companies were highest in Malta (50%) and the UK (46%). In about half of the EU Member States, however, less than a quarter of respondents answered that material costs for their company had *increased dramatically* in the past five years.

Respondents in the Czech Republic were the most likely to answer that their company's material costs had *remained unchanged* in the past five years (34%); in Denmark, Estonia, Bulgaria, Finland, Slovakia and Sweden, a fifth – or more – of respondents gave a similar response (21%-28%). Finally, in Bulgaria, Lithuania and Denmark, somewhat more than a fifth of interviewees reported that material costs for their company had *decreased* in the past five years (21%-23%).

How companies' material costs have evolved over 5 years



Q2. Have material costs for your company increased or decreased in the past 5 years?
Base: all companies, % by country

Company characteristics

Material-intensive companies were more likely to have experienced an increase in material costs in the past five years. For example, 65% of companies with less than 10% of material costs (as a percentage of "total costs") had seen a *moderate* or *dramatic increase* in the cost of materials in the past five years, this proportion increased to 78% for companies with material costs of more than 50% of their total costs. Furthermore, 22% of the former type of company, compared to 13% of the latter type, had not seen any changes in material costs in that time frame.

Smaller companies – in terms of annual turnover – were also more likely to report that material costs had *remained unchanged* in the past five years: 16% of companies with an annual turnover of less than €10 million, compared to 8% of those with an annual turnover of more than €50 million.

More than 8 in 10 (83%) respondents in companies that had grown in terms of turnover in the past two years answered that their company's material costs had *moderately* or *dramatically increased* in the past five years; the corresponding figure for companies that had seen their turnover decrease was 69%. Conversely, 14% of the latter type of respondent, compared to 5% of the former type, said that material costs for their company had *decreased* in the past five years.

Respondents in the water supply and waste management, and agriculture sectors were more likely than their counterparts in other sectors to say that material costs had *moderately* or *dramatically increased* for their company in the past five years (80% vs. 68% in the food services sector and 74%-76% in the construction and manufacturing sector).

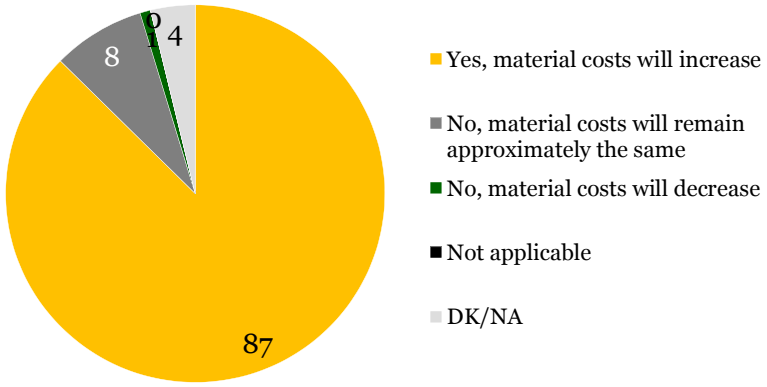
For more details, see annex table 9b.

1.3 Expected changes in material costs

As noted above, 75% of businesses in the EU had seen an increase in their costs of materials in the past five years; the proportion expecting price increases for materials in the coming 5 to 10 years was even higher: almost 9 in 10 (87%) interviewees said they expected such increases.

A tenth of respondents did not think that material costs would increase in the coming 5 to 10 years: 8% expected that such costs would remain the same and 1% expected a decrease in material costs.

Expectations about how companies' material costs will evolve (5 – 10 years)



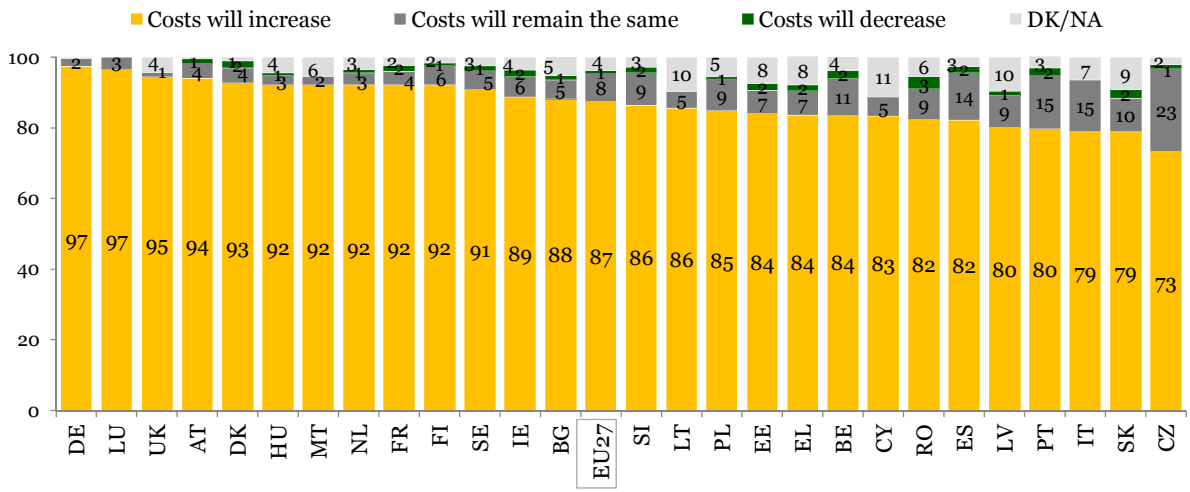
Q3. Do you expect price increases for materials in the coming 5 to 10 years?
Base: all companies, % EU27

Country variations

Across almost all countries, more than 8 in 10 entrepreneurs answered that prices for materials would increase in the coming 5 to 10 years (from 82% in Spain and Romania to 97% in Luxembourg and Germany). Moreover, across all countries, less than 5% of respondents expected a decrease in material prices in that time frame.

Entrepreneurs in the Czech Republic were the least likely to think that prices of materials would increase in the coming 5 to 10 years (73%); almost a quarter (23%) of respondents in that country thought that material prices would remain approximately the same in the coming 5 to 10 years. In four other countries, more than a tenth of interviewees shared the latter view: Belgium (11%), Spain (14%), Italy and Portugal (both 15%).

Expectations about how companies' material costs will evolve (5 – 10 years)



Q3. Do you expect price increases for materials in the coming 5 to 10 years?
Base: all companies, % by country

Company characteristics

Across all types of companies, the proportion of managers who answered that prices of materials would increase in the coming 5 to 10 years was close to 90%; this proportion varied between 86% for managers of companies that had experienced a decrease in annual turnover in the past two years and 93% for managers in the water supply and waste management sector.

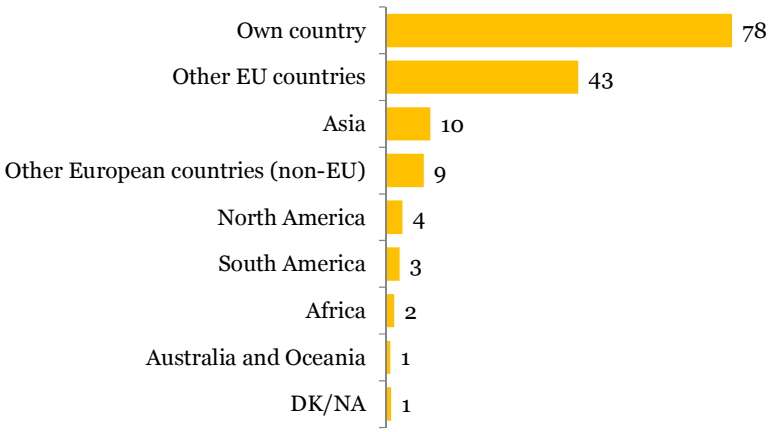
For more details, see annex table 10b.

1.4 Where do companies' materials originate from?

A majority (78%) of respondents answered that many of the materials they used came from (or originated from) their own country, while half as many respondents (43%) said that they came from other EU countries. Other (non-EU) European countries were mentioned by 9% of respondents.

A tenth of interviewees mentioned Asia as the region where many of their materials originated from; other continents were each mentioned by less than 5% of respondents (for example, 4% named North America and 2% mentioned Africa).

Origin of most of the materials that companies use



Q4. From what regions do most of the materials you use come/originate from?
Base: all companies, % EU27

Country variations

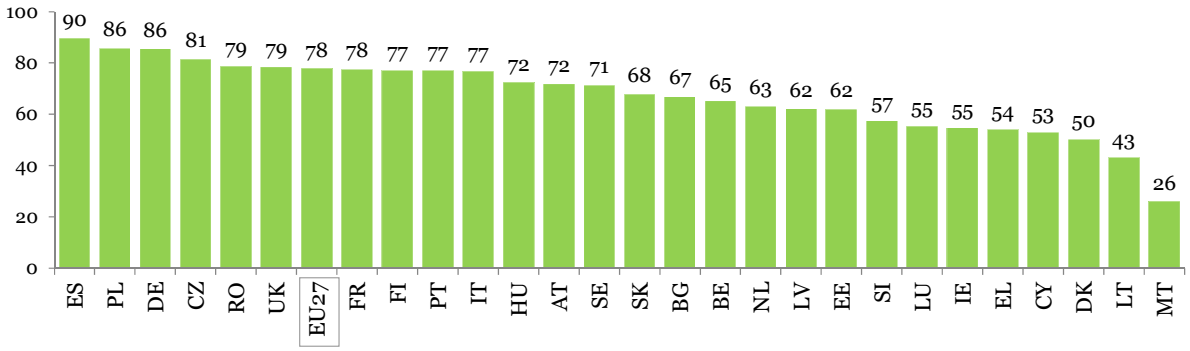
The proportion of companies that said they often used **materials from their own country** ranged from a quarter of companies in Malta (26%) to more than 8 in 10 companies in the Czech Republic, Germany, Poland and Spain (81%-90%). About a quarter of Italian companies (26%) and 3 in 10 Spanish companies (30%) were frequently using **materials that came from other EU countries**; in smaller EU countries, this proportion was considerably higher: for example, 81% in Luxembourg and 82% in Malta.

In about two-thirds of the EU Member States, the largest share of companies frequently used materials that came from (or originated from) their own country, while the second largest share of companies often used materials from other EU countries. For example, somewhat more than 8 in 10 respondents in Romania and the Czech Republic (79%-81%) said that many materials used in their company came from their own country, while more than 4 in 10 respondents mentioned other EU countries (47% and 45%, respectively).

In nine EU Member States, companies that often used materials from other EU countries outnumbered those that regularly used materials from their own country. For example, 82% of entrepreneurs in Malta said that many materials they used came from other EU countries, while 26% of entrepreneurs

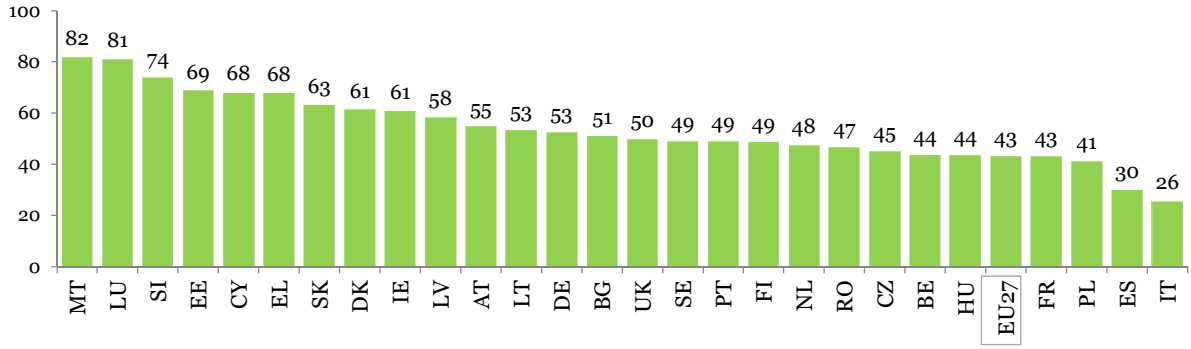
mentioned their own country. A similar picture emerged in Luxembourg, Slovenia, Estonia, Cyprus, Greece, Denmark, Ireland and Lithuania.

Origin of most of the materials that companies use
Companies' own country



Q4. From what regions do most of the materials you use come/originate from?
Base: all companies, % by country

Origin of most of the materials that companies use
Other EU countries



Q4. From what regions do most of the materials you use come/originate from?
Base: all companies, % by country

Other (non-EU) European countries were most frequently mentioned by respondents in Bulgaria and Estonia (22% and 26%, respectively). Asia was selected as the region where many of their company's materials came from by roughly a sixth of respondents in Denmark, Greece, Bulgaria and Germany (17%-19%). All other continents were mentioned by less than 10% of respondents across almost all Member States.

For more details, see annex table 11a.

Company characteristics

Across all types of companies, the largest proportion of respondents said that their company often used materials that came from (or originated from) their own country, while the second largest share said they regularly used materials from other EU countries. For example, 87% of agricultural companies frequently used materials that originated from their own country, while 42% used materials from other EU countries.

Larger companies (in terms of workforce or annual turnover, but nevertheless, medium-sized), those that had seen an increase in turnover in the past two years, material-intensive companies and those in the manufacturing sector were more likely than other types of companies to often use materials from other European countries or from other continents. For example, 52% of respondents in medium-sized companies mentioned other EU countries, compared to 42% of respondents in small companies. Similarly, other (non-EU) European countries were mentioned by 12% of respondents in the

manufacturing sector, compared to 4%-5% of respondents in other activity sectors. Finally, while 22% of respondents in companies with an annual turnover of more than €50 million answered that many of their materials came from Asia, this proportion was 9% for companies with an annual turnover of less than €2 million.

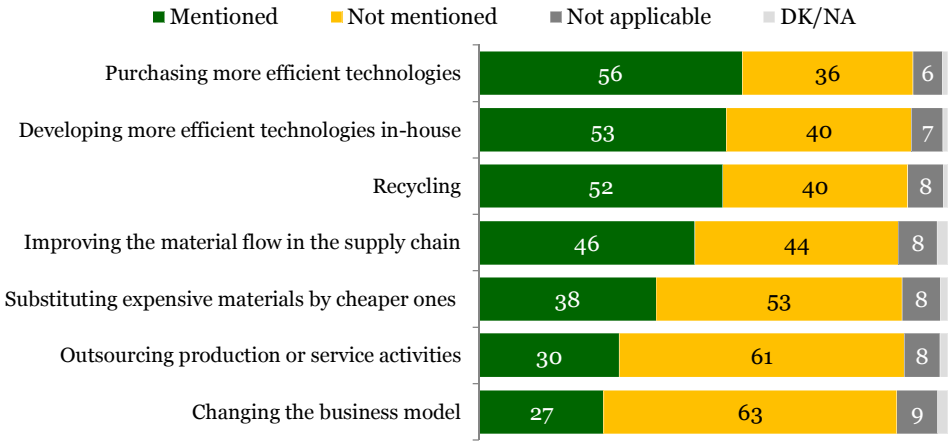
For more details, see annex table 11b.

1.5 Changes implemented to reduce material costs

In order to reduce material costs, 56% of companies had purchased more efficient technologies in the past five years, while 53% had developed more efficient technologies in-house during that time frame. A similar proportion (52%) mentioned recycling practices as a strategy that they had used to reduce material costs and 46% referred to an improvement of material flow in the supply chain.

In the five years prior to the survey, almost 4 in 10 (38%) companies had replaced expensive materials by cheaper alternatives in order to reduce material costs and 3 in 10 companies had outsourced production or service activities. Finally, 27% of businesses had chosen to change their business model in order to reduce material costs.

Changes implemented to reduce material costs in past 5 years



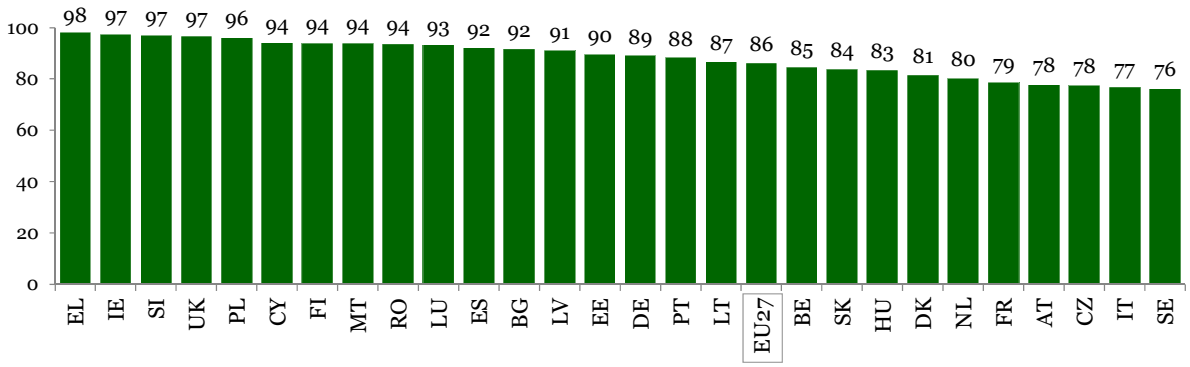
Q5. Have you implemented any changes to reduce material costs in the past 5 years?
Base: all companies, % EU27

Country variations

Almost 9 in 10 (86%) companies in the EU had introduced at least one change in the past five years in order to reduce material costs; at the individual country level, this proportion ranged from 76% in Sweden to 98% in Greece.

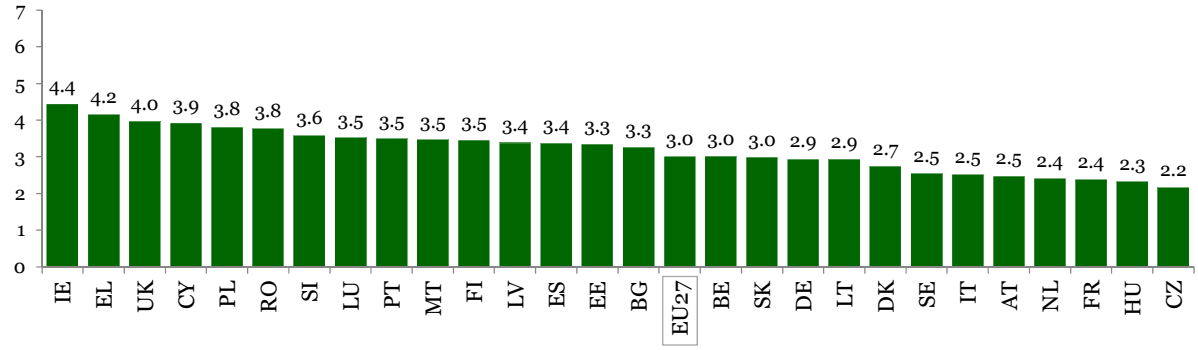
Furthermore, at the EU level, companies had introduced, on average, three of the changes listed in the survey. Greece and Ireland had the highest average scores (4.2 and 4.4, respectively), while the Czech Republic and Hungary had the lowest scores (2.2 and 2.3, respectively).

Companies that have implemented at least one change to reduce material costs



Q5. Have you implemented any changes to reduce material costs in the past 5 years?
Base: all companies, % by country

Average number of implemented changes

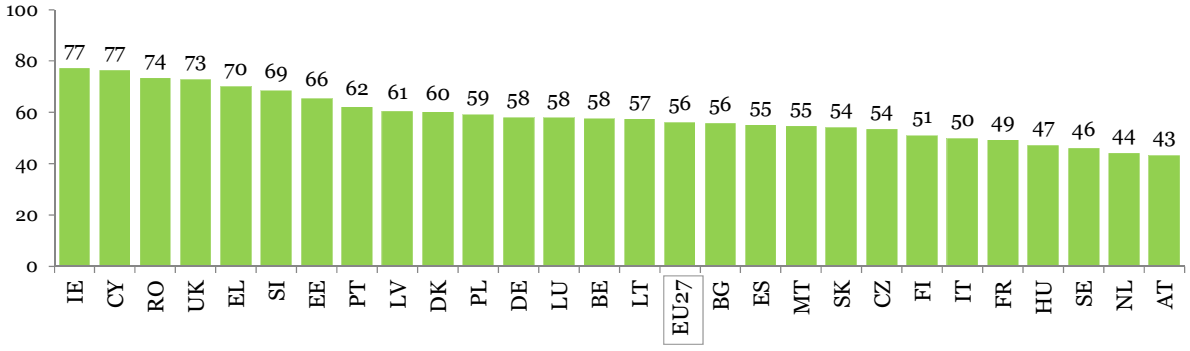


Q5. Have you implemented any changes to reduce material costs in the past 5 years?
Base: all companies, % by country

Across all countries, some of the largest proportions of respondents mentioned having introduced material-efficient technologies in the past five years (i.e. they purchased such technologies and/or developed them in-house).

In the UK, Romania, Cyprus and Ireland, more than 7 in 10 companies had **purchased more material-efficient technologies** in the past five years (73%-77%); in Austria, the Netherlands, Sweden, Hungary and France, on the other hand, less than half of companies had done the same (43%-49%).

Changes implemented to reduce material costs in past 5 years
Purchasing more efficient technologies

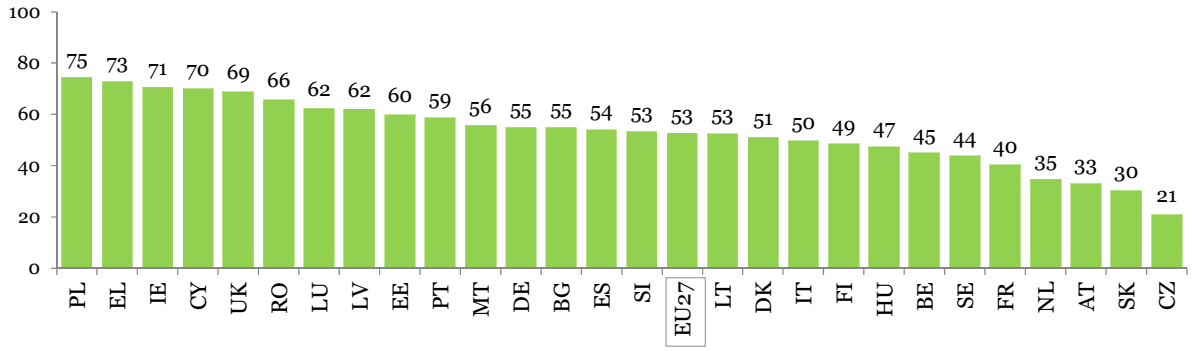


Q5. Have you implemented any changes to reduce material costs in the past 5 years?
Base: all companies, % of 'Mentioned' shown by country

Companies in Austria and the Netherlands were also among the least likely to have **developed more material-efficient technologies in-house** in the past five years (33% and 35%, respectively); companies in the Czech Republic and Slovakia were even less likely to have introduced such changes (21% and 30%, respectively).

In the UK, Cyprus and Ireland, roughly 7 in 10 companies had developed more efficient technologies in-house in order to reduce material costs (69%-71%); respondents in Greece and Poland, however, were the most likely to have done so (73% and 75%, respectively).

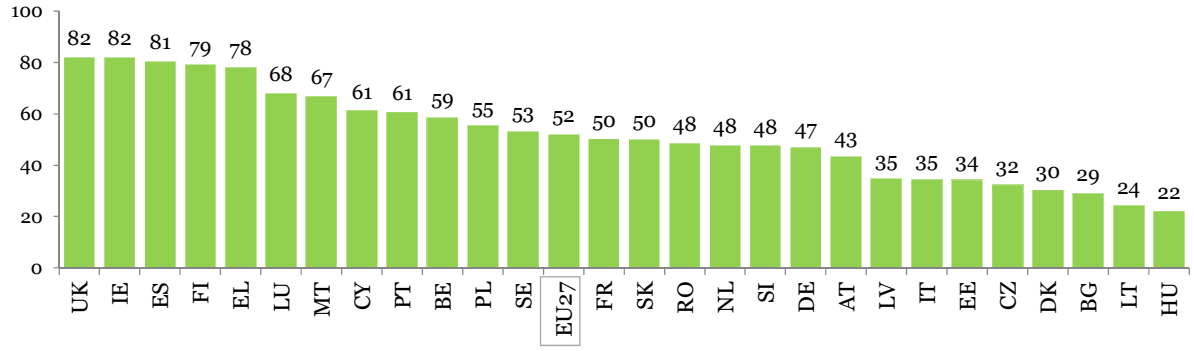
Changes implemented to reduce material costs in past 5 years
Developing more efficient technologies in-house



Q5. Have you implemented any changes to reduce material costs in the past 5 years?
Base: all companies, % of 'Mentioned' shown by country

A large variation was seen in the proportion of companies that had **recycled** in the past five years in order to reduce material costs; these proportions ranged from 22% in Hungary to 82% in Ireland and the UK. Greece, Finland and Spain were close to the UK and Ireland with roughly 8 in 10 companies that mentioned recycling as a strategy to reduce material costs (78%-81%).

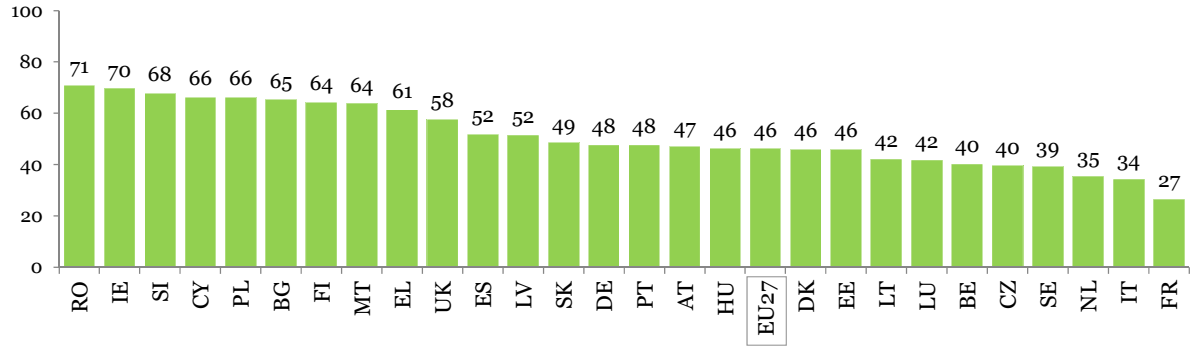
Changes implemented to reduce material costs in past 5 years
Recycling



Q5. Have you implemented any changes to reduce material costs in the past 5 years?
Base: all companies, % of 'Mentioned' shown by country

While just 27% of companies in France reported having **improved the material flow in the supply chain** in the past five years, this proportion increased to 70%-71% in Ireland and Romania. In a further seven countries, more than 6 in 10 companies gave a similar response (from 61% in Greece to 68% in Slovenia).

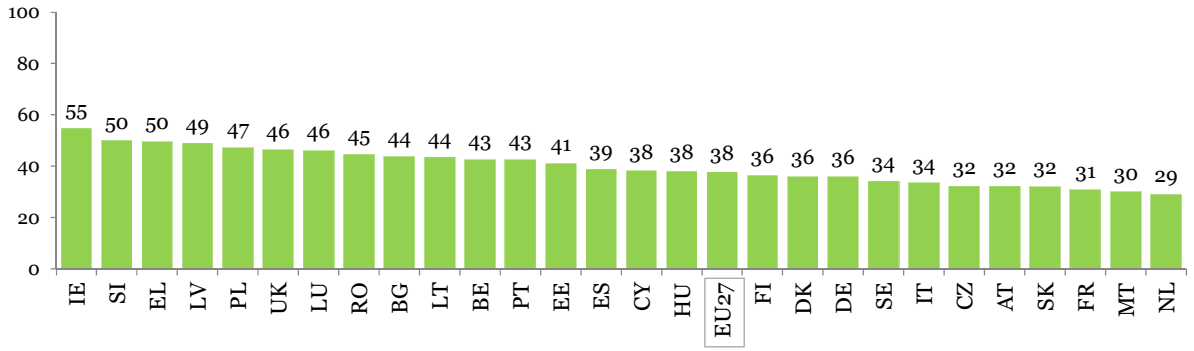
Changes implemented to reduce material costs in past 5 years
Improving the material flow in the supply chain



Q5. Have you implemented any changes to reduce material costs in the past 5 years?
Base: all companies, % of 'Mentioned' shown by country

The individual country results for the proportion of companies that had reduced material costs by **replacing expensive materials by cheaper ones** showed less variation; this proportion ranged from roughly 30% in the Netherlands, Malta and France to about half of the companies in Latvia, Greece and Slovenia (49%-50%) and a slim majority in Ireland (55%).

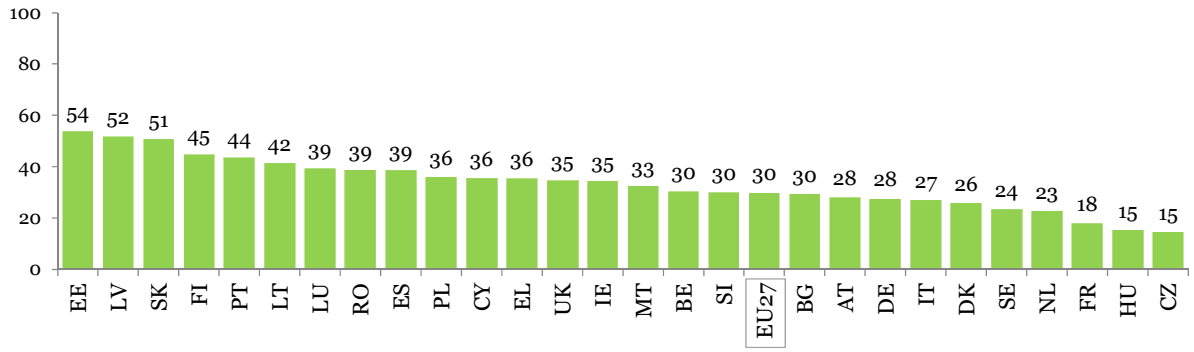
Changes implemented to reduce material costs in past 5 years
Substituting expensive materials by cheaper ones



Q5. Have you implemented any changes to reduce material costs in the past 5 years?
Base: all companies, % of 'Mentioned' shown by country

Outsourcing production or service activities in order to reduce materials costs was mentioned by a slim majority of entrepreneurs in Slovakia, Latvia and Estonia (51%-54%). In the Czech Republic, Hungary and France, however, less than a fifth of entrepreneurs had implemented such a change in the past five years (15%-18%).

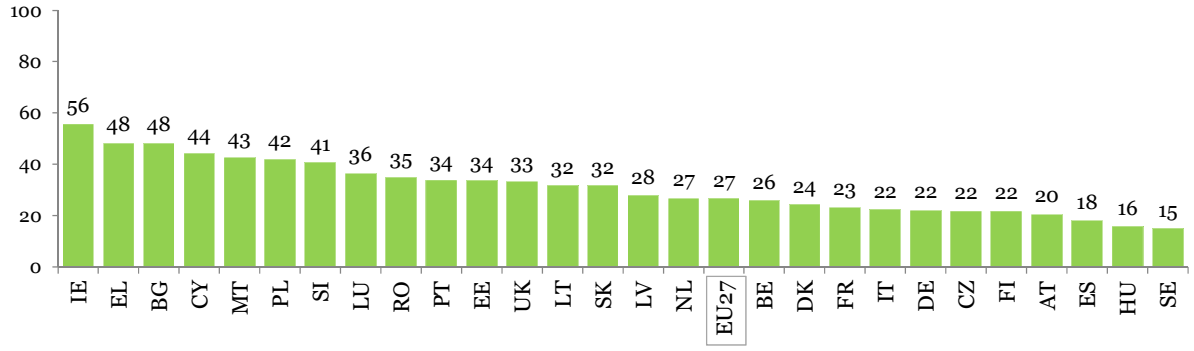
Changes implemented to reduce material costs in past 5 years
Outsourcing production or service activities



Q5. Have you implemented any changes to reduce material costs in the past 5 years?
Base: all companies, % of 'Mentioned' shown by country

Finally, in about half of the countries surveyed, less than a third of companies had **changed their business model** in an attempt to reduce material costs (from 15% in Sweden to 32% Slovakia and Lithuania). Ireland was the only country were more than half of companies had implemented such a change in the past five years (56%).

Changes implemented to reduce material costs in past 5 years
Changing the business model



Q5. Have you implemented any changes to reduce material costs in the past 5 years?
Base: all companies, % of 'Mentioned' shown by country

Company characteristics

Medium-sized companies were more likely than small ones to have introduced changes – as listed in the survey – to reduce material costs. For example, 69% of medium-sized companies had purchased more material-efficient technologies in the past five years, while 63% had developed more efficient technologies in-house during that time frame; the corresponding proportions for small companies were 54% and 51%, respectively.

Companies with a high annual turnover and those that had recently grown in terms of turnover were also more likely to have introduced changes to reduce material costs. For example, 44% of companies with an annual turnover of less than €2 million reported having improved the material flow in the supply chain in the past five years, whereas two-thirds (67%) of companies with an annual turnover of more than €50 million had done this.

The higher a company's material costs (as a percentage of "total costs"), the more likely it was to have implemented changes to reduce that amount. For example, about a third (32%) of companies with material costs of more than 50% had changed their business model in the past five years, compared to only half as many companies with material costs accounting for less than 10% of the total (17%).

It was noted in section 1.1 that companies in the water supply and waste management sector were less likely to report that material costs represented 30% or more of their total production value; as such, they were also less likely to have attempted to reduce material costs. Agricultural companies, on the other hand, were the most likely to have introduced the material cost-saving changes listed in the survey. For example, 45% of agriculture companies had replaced expensive materials by cheaper alternatives, compared to 28% of companies in the water supply and waste management sector.

For more details, see annex tables 12b through 18b.

2. Eco-innovative activities

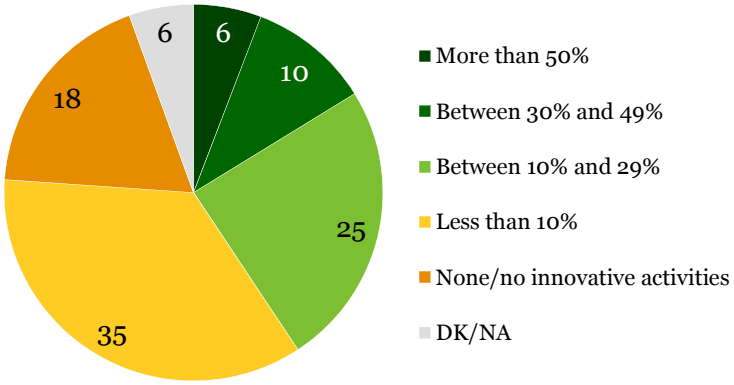
2.1 Share of innovation investments related to eco-innovation

A majority of companies included in this survey had made innovation investments in the past five years. Respondents were asked what share of innovation investments during that time frame had been related to eco-innovations – i.e. implementing new or substantially improved solutions resulting in more efficient use of materials, energy and water.

Just over a third of companies (35%) reported that less than 10% of their innovation investments in the past five years were related to eco-innovation and a quarter estimated that this share was between 10% and 29%.

Relatively few (6%) managers answered that more than 50% of the innovation investments made by their company in the past five years were related to eco-innovation; almost twice as many respondents (10%) said that the share related to eco-innovation was between 30% and 49%.

Share of eco-innovation-related investments in last 5 years



Q6. Over the last 5 years, what share of innovation investments in your company were related to eco-innovation, i.e. implementing new or substantially improved solutions resulting in more efficient use in material, energy and water?
Base: all companies, % EU27

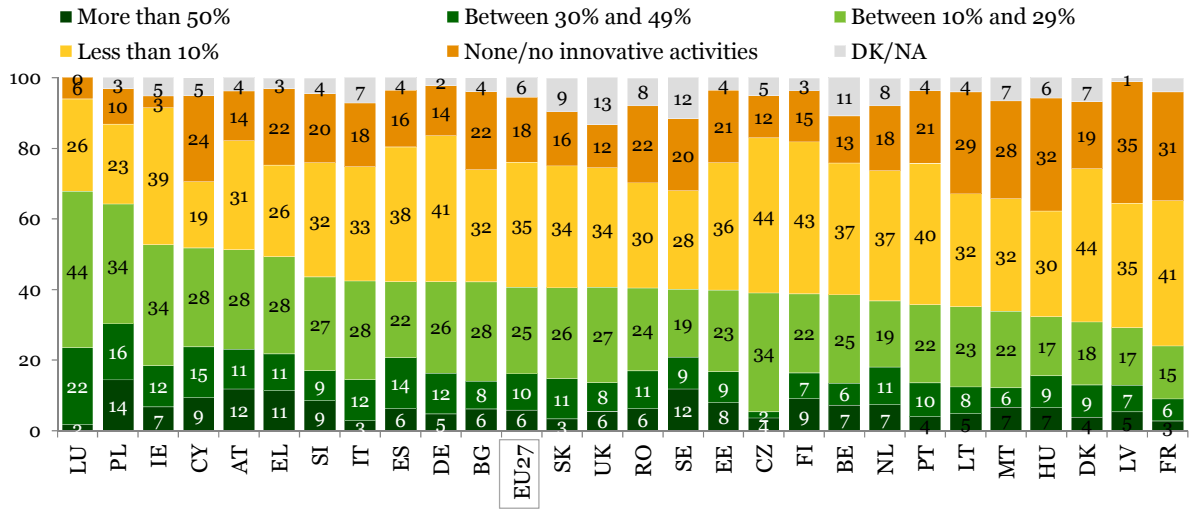
Country variations

As for the individual country results, many companies in all countries had made eco-innovation investments in the past five years; however, a minority reported that the share of innovation investments related to eco-innovation was 30% or more. In just six countries, more than a fifth of respondents estimated that they had reached this level: Sweden (21%), Greece (22%), Austria (23%), Cyprus and Luxembourg (both 24%) and Poland (30%).

In almost all countries, the largest proportion of respondents answered that less than 10% of their company's innovation investments were related to eco-innovation; respondents in Finland, Denmark and the Czech Republic were the most likely to select this response (43%-44%).

In France, Hungary and Latvia, more than 30% of managers said that their company had not made any eco-innovative investments (or had not made *any innovation investments at all*) in the past five years (31%, 32% and 35%, respectively).

Share of eco-innovation-related investments in last 5 years



Q6. Over the last 5 years, what share of innovation investments in your company were related to eco-innovation, i.e. implementing new or substantially improved solutions resulting in more efficient use in material, energy and water?
Base: all companies, % by country

Company characteristics

Companies in the water supply and waste management sector were not only less likely to have implemented changes to reduce material costs (see section 1.4), they were also the least likely to have made innovation investments in the past five years (26% "none/no innovative activities" vs. 13% in the agricultural sector and 18%-19% in the remaining activity sectors). Other companies that were less likely to have made innovation investments were the smaller ones (in terms of workforce or turnover), the ones that had experienced a decrease in turnover in the past two years and those with low material costs.

Companies that had made the largest share of eco-innovation investments were more likely to be found in the agricultural sector – but also in the water supply and waste management sector. In these two sectors, about a fifth of entrepreneurs estimated that at least 30% of their innovation investments of the past five years were related to eco-innovation (19%-21%), compared to less than a sixth of entrepreneurs in the other activity sectors (15%-16%). In other words, although water supply and waste management companies were among the least likely to have made innovation investments in the past five years, those that had made such investments were very likely to have made a large share of eco-innovation-related investments.

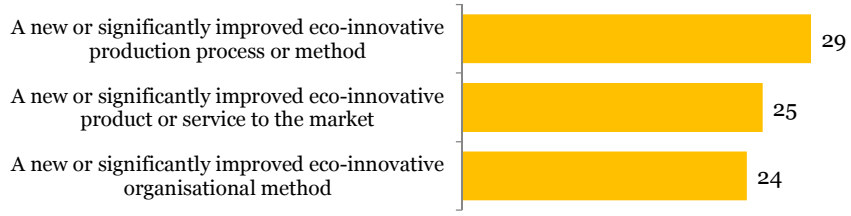
Other examples of managers who were more likely to have estimated that more than 30% of the innovation investments made by their company in the past five years were related to eco-innovation were those in companies with an annual turnover of more than €10 million (20%-22% vs. 15% in companies with an annual turnover of less than €2 million) and those in companies that had experienced an increase in turnover in the past two years (20% vs. 14% in companies that had seen their turnover decrease).

For more details, see annex table 19b.

2.2 Eco-innovations introduced in the past two years

Roughly 3 in 10 (29%) companies in the EU had introduced a new or significantly improved eco-innovative production process or method in the past two years, while roughly a quarter (24%) had introduced a new or significantly improved eco-innovative organisational method. A similar proportion (25%) had introduced a new or significantly improved eco-innovative product or service on the market.

Introduction of various eco-innovations in past 2 years

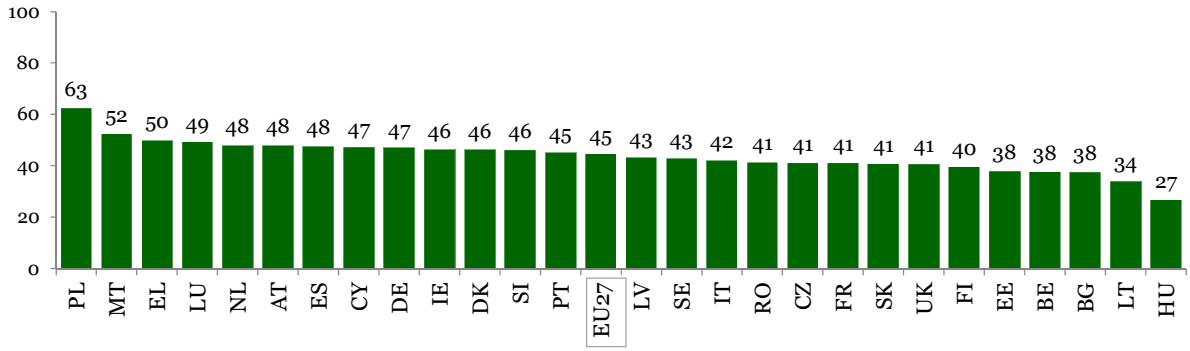


D5. During the past 24 months have you introduced the following eco-innovation?
Base: all companies, % of 'Yes' shown, EU27

Country variations

More than 4 in 10 (45%) companies in the EU reported having introduced at least one eco-innovation in the past two years. Companies in Poland were the most likely to have introduced a new or significantly improved eco-innovative product or service, production process or organisational method in the past two years (63%); companies in Hungary were the least likely to have done so (27%).

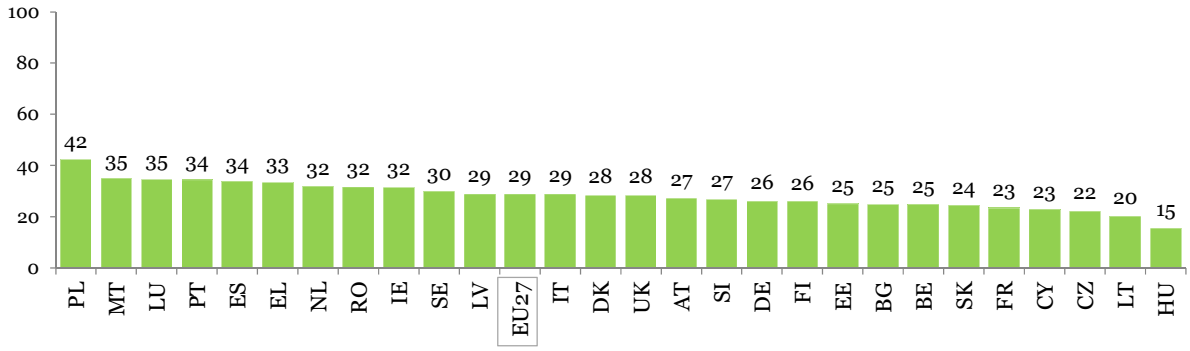
Companies that introduced at least one eco-innovation in the past 2 years



D5. During the past 24 months have you introduced the following eco-innovation?
Base: all companies, % by country

In Poland, 42% of respondents answered that their company had introduced a new or significantly improved **eco-innovative production method or process** in the past two years; in another eight countries, roughly a third of respondents said that their company had done this (from 32% in Ireland, Romania and the Netherlands to 35% in Luxembourg and Malta). In Hungary, on the other hand, just 15% of companies had introduced a new eco-innovative production process or method.

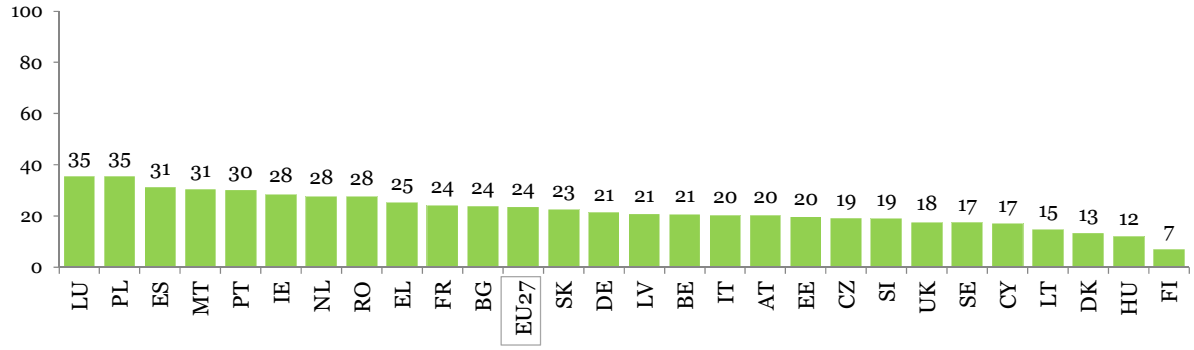
Introduction of a new or significantly improved eco-innovative production process or method in the past 2 years



D5. During the past 24 months have you introduced the following eco-innovation?
Base: all companies, % of 'Yes' shown by country

Hungarian companies were also among the least likely to have introduced a new or significantly improved **eco-innovative organisational method** in the past two years (12%). Companies in Finland, however, were the least likely to have introduced such a new organisational method (7%), while those in Poland and Luxembourg were – once again – the most likely to have introduced this type of innovation (both 35%).

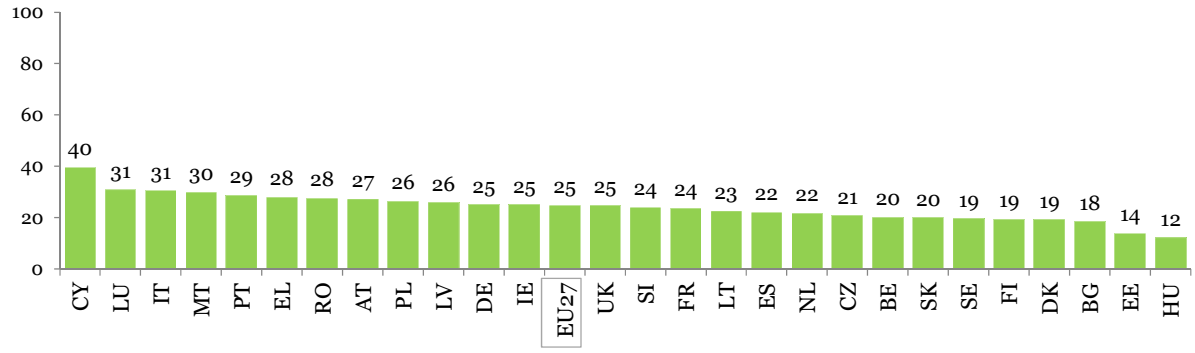
Introduction of a new or significantly improved eco-innovative organisational method in the past 2 years



D5. During the past 24 months have you introduced the following eco-innovation?
Base: all companies, % of 'Yes' shown by country

The proportion of companies that had brought a new or significantly improved **eco-innovative product or service** to the market in the past two years ranged from somewhat more than a tenth (12%-14%) in Hungary and Estonia to 4 in 10 companies in Cyprus. In Portugal, Malta, Italy and Luxembourg, roughly 30% of companies had introduced a new or significantly improved eco-innovative product or service (29%-31%); in a majority of the Member States, however, this proportion remained below a quarter.

Introduction of a new or significantly improved eco-innovative product or service to the market in the past 2 years



D5. During the past 24 months have you introduced the following eco-innovation?
Base: all companies, % of 'Yes' shown by country

Company characteristics

In accordance with results discussed in the previous section, medium-sized companies, companies with an annual turnover between €10 and €50 million and those that had grown in terms of turnover in the past two years were more likely to have introduced the types of eco-innovation listed in the survey. For example, 32% of medium-sized companies had introduced a new or significantly improved eco-innovative organisational method in the past two years and 41% said the same for a new or significantly improved production method or process; the corresponding figures for small companies were 22% and 26%, respectively.

Entrepreneurs who said that material costs represented less than 10% of their total costs, on the other hand, were less likely to say that they had introduced different types of eco-innovation. For example, 21% said they had introduced a new or significantly improved product or service on the market in the past 24 months, compared to 25%-26% among companies with higher shares of material costs.

Companies in the agriculture and food services sectors were more likely to have introduced a new or significantly improved eco-innovative organisational method in the past two years (31%-32% vs. 18%-22% in other sectors of activity). Furthermore, agricultural companies were more likely than those in other activity sectors to have introduced a new or significantly improved eco-innovative production process (40% vs. 23% in "construction" and 29%-31% in the remaining activity sectors), while companies in the food services sector were somewhat more likely to have developed a new or significantly improved eco-innovative product or service (27% vs. 23%-25%).

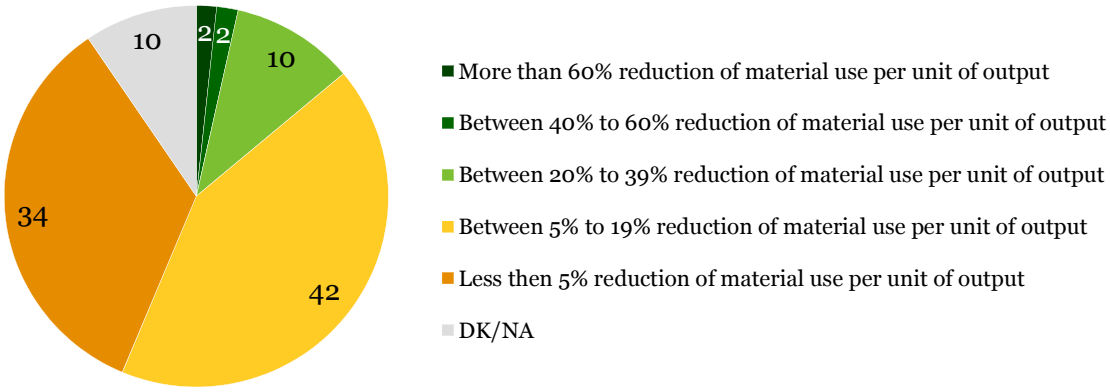
For more details, see annex table 20b.

2.3 Relevance of innovations in terms of resource efficiency

Among companies that had introduced at least one type of eco-innovation in the past two years, the largest number (42%) said that such eco-innovation had led to a reduction in material use of between 5% and 19% per unit of output, while roughly a third (34%) of respondents estimated that the reduction in material use had been less than 5% per unit of output.

Smaller shares of respondents answered that their company's eco-innovations of the past 24 months had reduced material use by at least 20% per output unit. A tenth said that this reduction had been between 20% and 39%, while less than 1 in 20 respondents answered that their material use per unit of output had decreased by at least 40% (2% for each of the "between 40% and 60%" and "more than 60%" responses). A tenth of respondents did not or would not answer this question.

Relevance of eco-innovation companies have introduced in terms of resource efficiency in the past 2 years



Qo. How would you describe the relevance of innovation you have introduced in the past 24 months in terms of resource efficiency?
Base: companies that introduced an eco-innovation, % EU27

Country variations

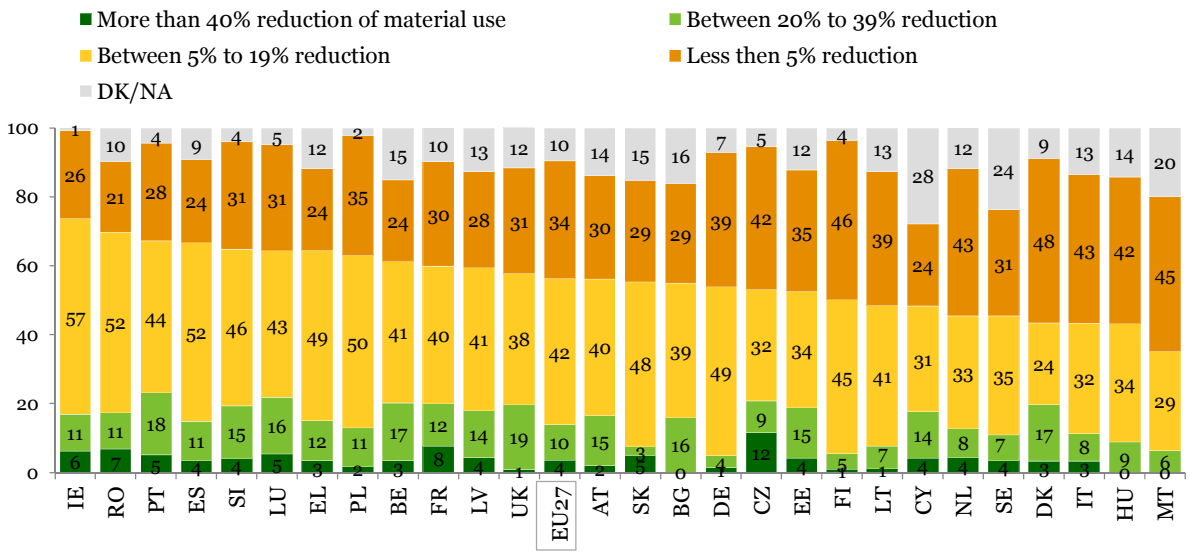
The question about relevance of innovations in terms of resource efficiency was only presented to companies that had introduced at least one type of eco-innovation in the past two years; as a result, the sample size per country was less than 100 in most countries and caution should be exercised when interpreting the results at an individual country level.

In the Czech Republic, roughly a tenth (9%) of managers answered that the reduction in material use due to eco-innovations that their company had introduced in the past 24 months was between 20% and 39% per unit of output and somewhat more than a tenth (12%) answered that their material use per unit of output had decreased by at least 40%. In Luxembourg and Portugal, somewhat more than a fifth (21%-23%) of managers reported a decrease in material use of at least 20% per output unit.

A majority of respondents in three countries, and a relative majority in 16 countries, said that recent eco-innovations in their company had led to a reduction in material use of between 5% and 19% per unit of output (from 31% in Cyprus to 57% in Ireland). In the remaining countries, however, the largest share of respondents thought that the reduction in material use had been less than 5% per unit of output; respondents in Denmark were the most likely to select this response (48%).

In many countries, a considerable proportion of respondents found it difficult to estimate the relevance of eco-innovations in terms of resource efficiency; the proportions of "don't know" answers were highest in Sweden and Cyprus (24% and 28%, respectively).

Relevance of eco-innovation companies have introduced in terms of resource efficiency (past 2 years)



Qo. How would you describe the relevance of innovation you have introduced in the past 24 months in terms of resource efficiency?

Base: companies that introduced an eco-innovation, % by country

Company characteristics

Across all types of companies, a minority of respondents answered that their company's eco-innovations in the past two years had reduced material use by at least 40% per unit of output; furthermore, more than a quarter of respondents across all types of companies answered that the reduction in material use had been less than 5% per unit of output (between 26% and 40%).

Companies with an annual turnover of between €10 and €50 million stood out with 18% of managers who answered that their material use had decreased by between 20% and 39% per unit of output; the corresponding proportion for companies with an annual turnover of more than €50 million was 14%, but this proportion decreased to 8% among companies with an annual turnover of between €2 million and €10 million.

For more details, see annex table 21b.

3. Barriers to an accelerated uptake of eco-innovation

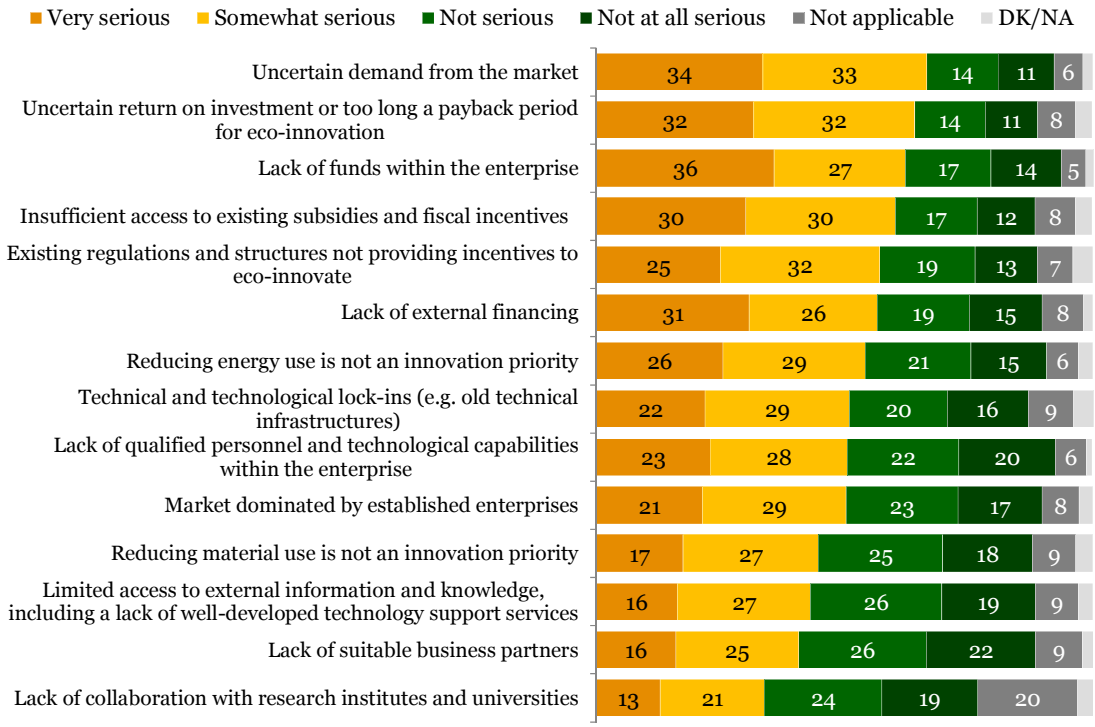
This chapter analyses SMEs' views about barriers to an accelerated development and uptake of eco-innovation. In order to do this, 14 potential barriers were presented to interviewees and they were asked, for each one, whether they considered these to be a serious barrier or not to a faster uptake of eco-innovation in their company.

For each of the potential barriers related to financing and funds, a majority of respondents thought that it was a *very* or *somewhat serious* barrier to an accelerated development and uptake of eco-innovation. More than a third (36%) of managers said that a lack of **funds within their enterprise** was a *very serious* barrier and roughly a quarter (27%) said that this was a *somewhat serious* barrier; the corresponding figures for a lack of **external financing** were 31% and 26%, respectively.

Insufficient access to **existing subsidies and fiscal incentives** was considered a barrier by 6 in 10 respondents (30% "very serious" and 30% "somewhat serious" responses). Furthermore, 64% of interviewees said that an **uncertain return on investment or too long a payback period** for eco-innovations stopped them from introducing such innovations (32% said this was a *very serious* barrier and 32% a *somewhat serious* barrier).

Two-thirds of managers said that the **uncertain demand from the market** was a barrier to a faster uptake of eco-innovation in their company (34% "very serious" and 33% "somewhat serious" responses), but they were considerably less likely to say that they **could not find suitable business partners** to develop eco-innovations (16% said this was a *very serious* barrier and 25% a *somewhat serious* barrier).

Barriers to accelerated eco-innovation uptake and development



Q7. I will list you some barriers that could represent an obstacle to accelerated eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very serious, somewhat serious, not serious or not at all serious barrier in case of your company?
Base: all companies, % EU27

A majority of respondents also said that **existing regulations and structures** did not provide incentives to eco-innovate; 25% said this was a *very serious* barrier and 32% a *somewhat serious* barrier. Respondents were, however, somewhat less likely to identify **technical and technological lock-ins** (22% "very serious" and 29% "somewhat serious" responses) or a **market dominated by**

established companies (21% "very serious" and 29% "somewhat serious" responses) as barriers to a faster uptake of eco-innovation in their company.

A **lack of qualified personnel and technological capabilities within their enterprise** was considered a *very serious* barrier by 23% of respondents, while 28% said this was a *somewhat serious* barrier. A smaller number of respondents thought that **limited access to external information and knowledge**, including a lack of well-developed technology support services, was a barrier to introducing eco-innovations in their company (16% "very serious" and 27% "somewhat serious" responses). The corresponding figures for a **lack of collaboration with research institutes and universities** were 13% and 21%, respectively (note: 20% of respondents said that this barrier was not relevant for their company).

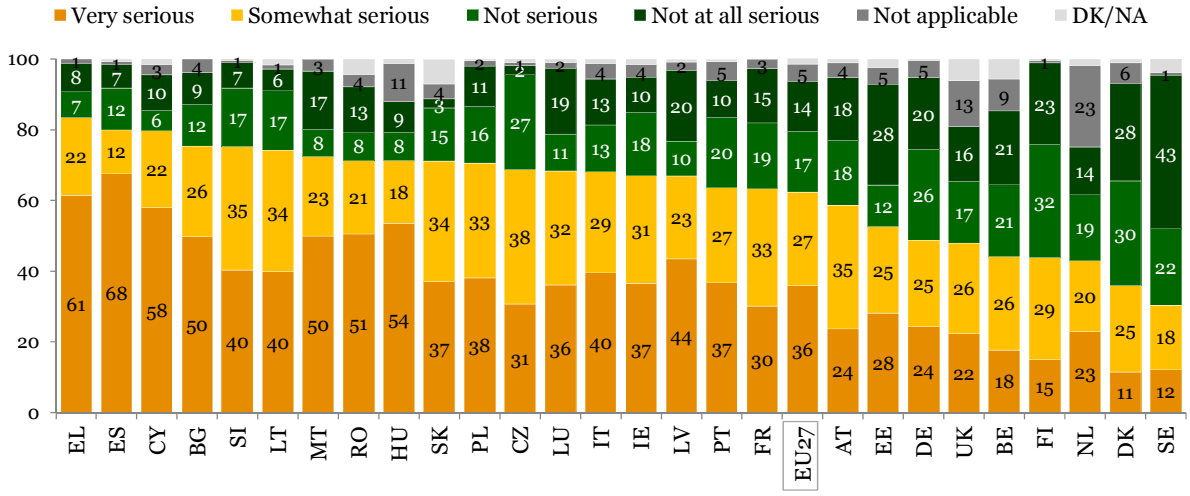
Finally, a slim majority answered that the fact that **reducing their use of energy was not an innovation priority** was a barrier (26% said this was a *very serious* barrier and 29% a *somewhat serious* barrier) and less than half of respondents said the same about a **reduction in their use of materials not being a priority** (17% "very serious" and 27% "somewhat serious" responses).

Country variations

Somewhat more than 8 in 10 (83%) respondents in Greece said that **a lack of funds within their enterprise** was a *very* or *somewhat* serious barrier to an accelerated development and uptake of eco-innovation; this view was shared by 80% of interviewees in Cyprus and Spain. Respondents in these three countries were also the most likely in the EU to say that such a lack of funds was a *very serious* obstacle (between 58% and 68%).

In Sweden and Denmark, on the other hand, less than 4 in 10 managers were limited, in their initiatives to eco-innovate, by a lack of internal funds (30% and 36%, respectively, of "very serious/somewhat serious" responses). Furthermore, respondents in Sweden were also the most likely to say that a lack of funds within their company was *not at all* a *serious* barrier (43%); the proportion of such responses was also high in Finland (23%), Denmark and Estonia (both 28%).

Barriers to accelerated eco-innovation uptake and development for companies
Lack of funds within the enterprise

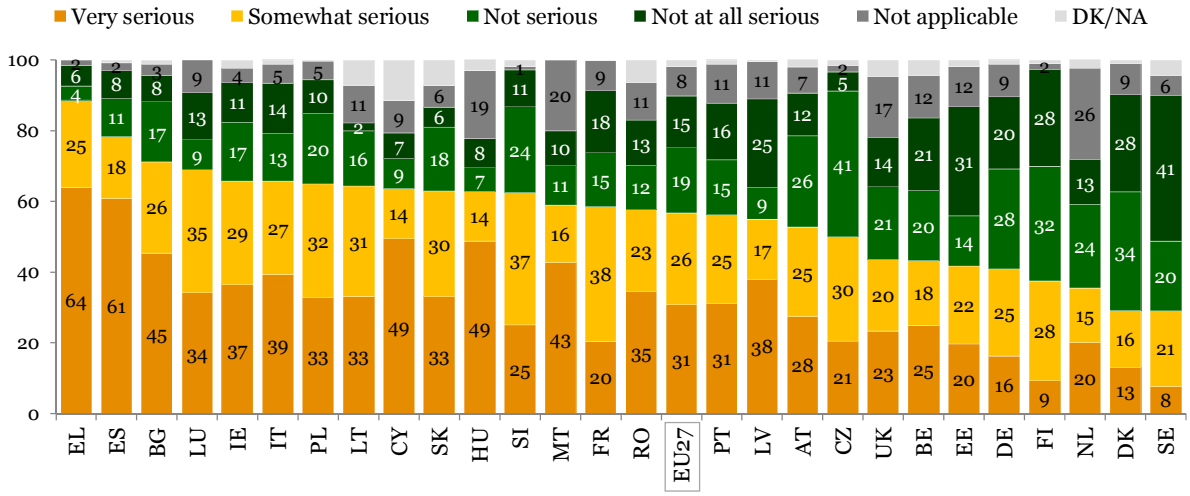


Q7. I will list you some barriers that could represent an obstacle to accelerated eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very serious, somewhat serious, not serious or not at all serious barrier in case of your company?
Base: all companies, % by country

A similar picture (to the one described above) appeared when looking at the results for a lack of **external financing**. The proportion of respondents who thought that this was a *very* or *somewhat serious* barrier to an accelerated development and uptake of eco-innovation in their company ranged from 29% in Sweden and Denmark to 89% in Greece. Similarly, the proportion of "very serious" responses ranged from less than a tenth in Sweden and Finland (8%-9%) to more than 6 in 10 in Spain and Greece (61%-64%).

Sweden stood out with 41% of managers who said that a lack of external financing was *not at all* a *serious* barrier to introducing and developing eco-innovations in their company. In Denmark, Finland and Estonia, more than a quarter of respondents shared this view (28%-31%).

Barriers to accelerated eco-innovation uptake and development for companies
Lack of external financing

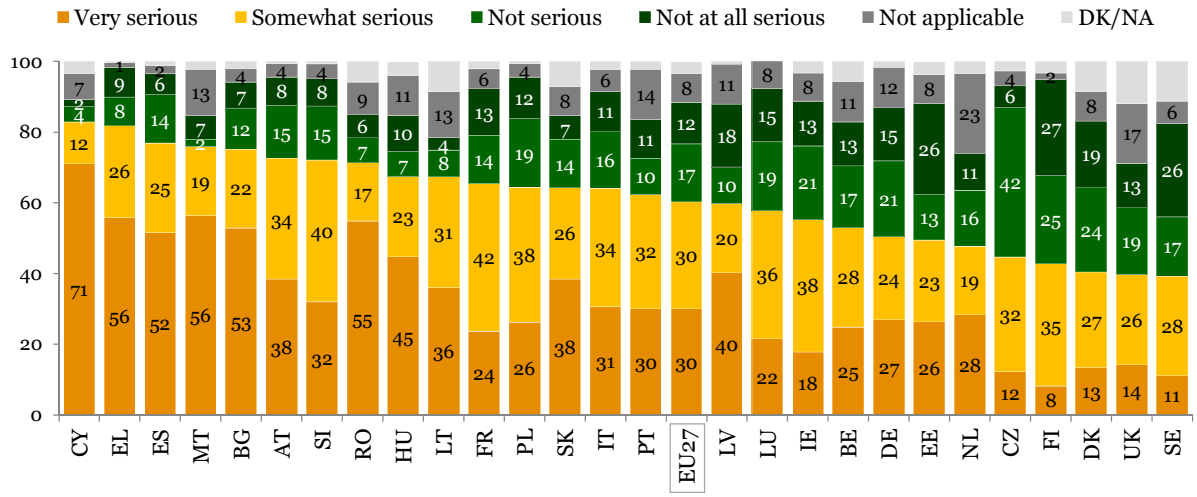


Q7. I will list you some barriers that could represent an obstacle to accelerated eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very serious, somewhat serious, not serious or not at all serious barrier in case of your company?
Base: all companies, % by country

In the five countries at the right-hand side of the next chart, roughly 4 in 10 managers answered that **insufficient access to existing subsidies and fiscal incentives** was a *very* or *somewhat serious* barrier to a faster uptake of eco-innovations in their company. Furthermore in these countries, the proportion of "very serious" responses varied between 8% in Finland and 14% in the UK.

In Greece and Cyprus, however, twice as many interviewees thought that such insufficient access to subsidies and fiscal incentives was a barrier to eco-innovation (82%-83% of "very serious" and "somewhat serious" responses). In Cyprus, 71% of managers even said that this barrier was *very serious*. In a further five countries, a majority of respondents gave a similar response: 52% in Spain, 53% in Bulgaria, 55% in Romania and 56% in Greece and Malta.

Barriers to accelerated eco-innovation uptake and development for companies
Insufficient access to existing subsidies and fiscal incentives

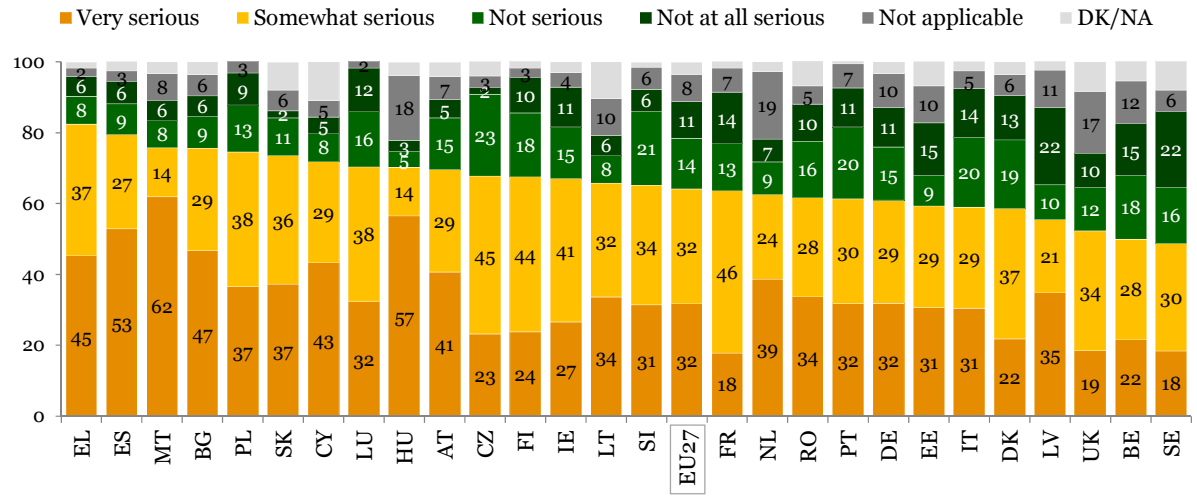


Q7. I will list you some barriers that could represent an obstacle to accelerated eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very serious, somewhat serious, not serious or not at all serious barrier in case of your company?
Base: all companies, % by country

The individual country results for **uncertainty about investment return and the payback periods for eco-innovations** – once more – showed that entrepreneurs in Sweden were the least concerned about financial barriers: somewhat less than half (48%) of managers in this country considered this type of uncertainty to be a *very serious* or *somewhat serious* barrier. Belgium was close to Sweden with 50% of "very serious" and "somewhat serious" responses.

In Greece, on the other hand, the share of managers who felt limited in their eco-innovative initiatives by their uncertain return on investment and payback periods that were too long was again somewhat higher than 80% (45% "very serious" and 37% "somewhat serious" responses). The proportions of respondents who considered this to be a *very serious* barrier, however, were highest in Malta (62%) and Hungary (57%).

Barriers to accelerated eco-innovation uptake and development for companies
Uncertain return on investment or too long a payback period for eco-innovation

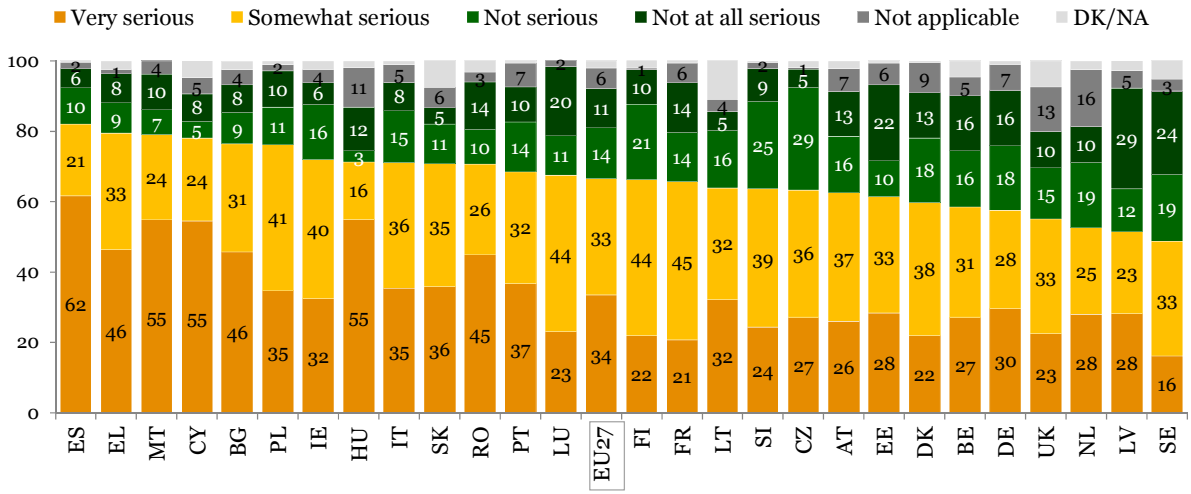


Q7. I will list you some barriers that could represent an obstacle to accelerated eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very serious, somewhat serious, not serious or not at all serious barrier in case of your company?
Base: all companies, % by country

Similar to the uncertainty about investment returns and payback periods for eco-innovations, across all countries, roughly one in two – or more – respondents answered that an **uncertain demand from the market** was a *very serious* or *somewhat serious* barrier (from 49% in Sweden to 83% in Spain).

Focusing on the more extreme response options, it was noted that a majority of respondents in Hungary, Cyprus, Malta and Spain said that an uncertain demand from the market was a *very serious* barrier (55%-62%); this proportion decreased to less than a quarter in Sweden, France, Finland, Denmark, the UK, Luxembourg and Slovenia (16%-24%). The proportions of "not at all serious" responses were highest in Estonia (22%), Sweden (24%) and Latvia (29%); but remained below 10% in about half of the countries surveyed.

Barriers to accelerated eco-innovation uptake and development for companies
Uncertain demand from the market



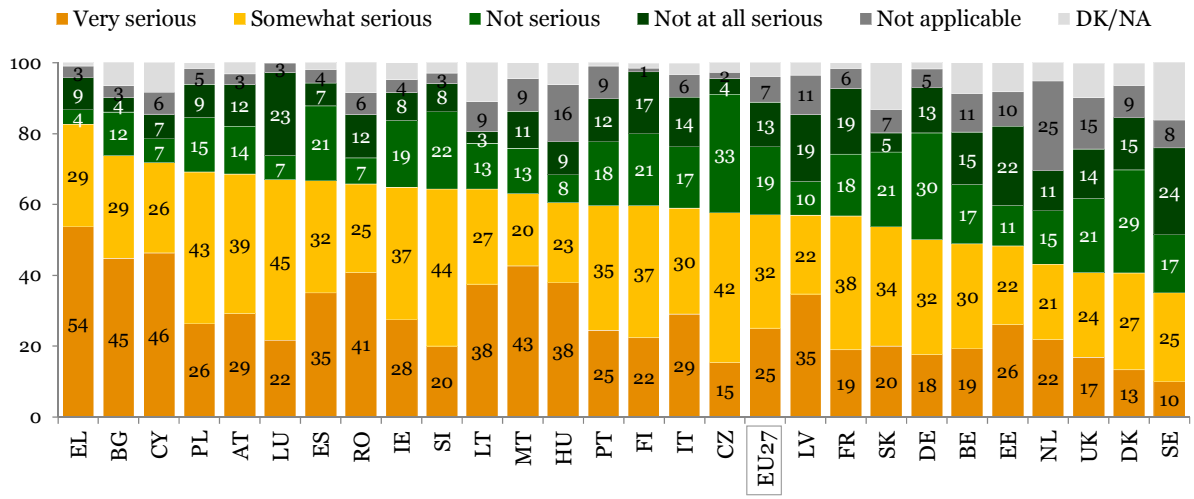
Q7. I will list you some barriers that could represent an obstacle to accelerated eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very serious, somewhat serious, not serious or not at all serious barrier in case of your company?
Base: all companies, % by country

More than 8 in 10 entrepreneurs in Greece thought that **existing regulations and structures** did not provide incentives to eco-innovate; 54% said the regulations were a *very serious* barrier and 29% thought that this barrier was *somewhat serious*. Cyprus and Bulgaria were close to Greece with 45%-46% of "very serious" responses and 26%-29% of "somewhat serious" responses.

In Sweden, on the other hand, just 35% of entrepreneurs answered that existing regulations and structures were a serious barrier to eco-innovation. Other countries at the lower end of the distribution were Denmark, the UK and the Netherlands with 40%-43% of respondents who gave a similar answer.

More than 4 in 10 respondents in Sweden and Denmark said that existing regulations and structures were *not a serious* or *not at all* a *serious* barrier to a faster uptake of eco-innovation in their company (41%-44%); this proportion was lower in the UK and the Netherlands (35% and 26%, respectively). In the latter countries, a considerable proportion of respondents thought that this barrier was not relevant or did not know what to answer.

Barriers to accelerated eco-innovation uptake and development for companies
Existing regulations and structures not providing incentives to eco-innovate

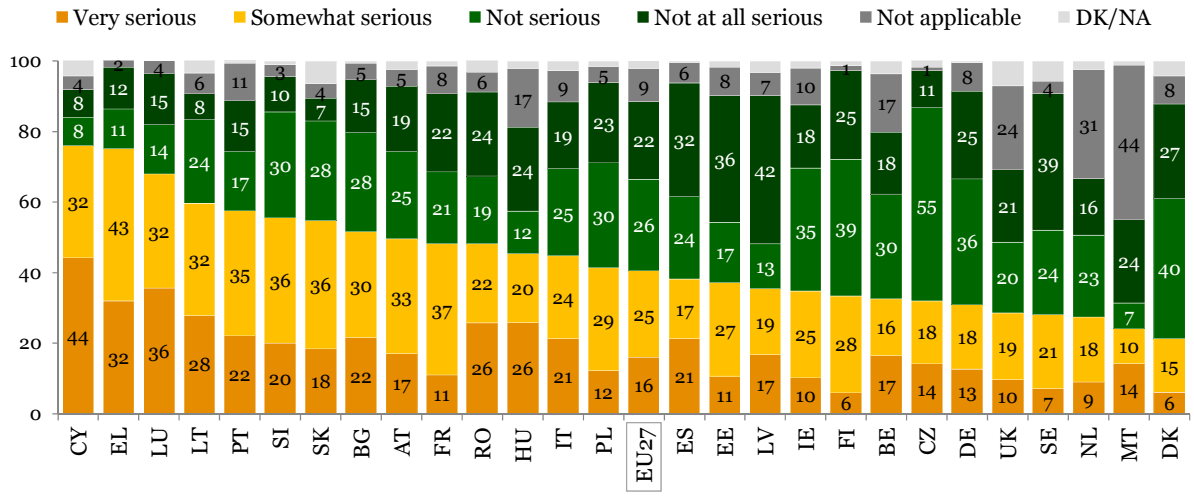


Q7. I will list you some barriers that could represent an obstacle to accelerated eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very serious, somewhat serious, not serious or not at all serious barrier in case of your company?
Base: all companies, % by country

The individual country results for "**a lack of suitable business partners"** showed a large variation across Member States; the proportion of respondents who considered this to be a *very serious* or *somewhat serious* barrier ranged from less than a quarter in Denmark and Malta (21%-24%) to roughly two-thirds in Luxembourg (68%) and three-quarters in Greece and Cyprus (75%-76%).

In half of the countries surveyed, more than a fifth of respondents answered that a lack of suitable business partners was *not at all* a *serious* barrier; managers in Estonia, Sweden and Latvia were the most likely to select this response (36%-42%). There were, however, also some countries where a considerable proportion of respondents said that this question about business partners was not relevant to their company's situation: 24% in the UK, 31% in the Netherlands and 44% in Malta.

Barriers to accelerated eco-innovation uptake and development for companies
Lack of suitable business partners



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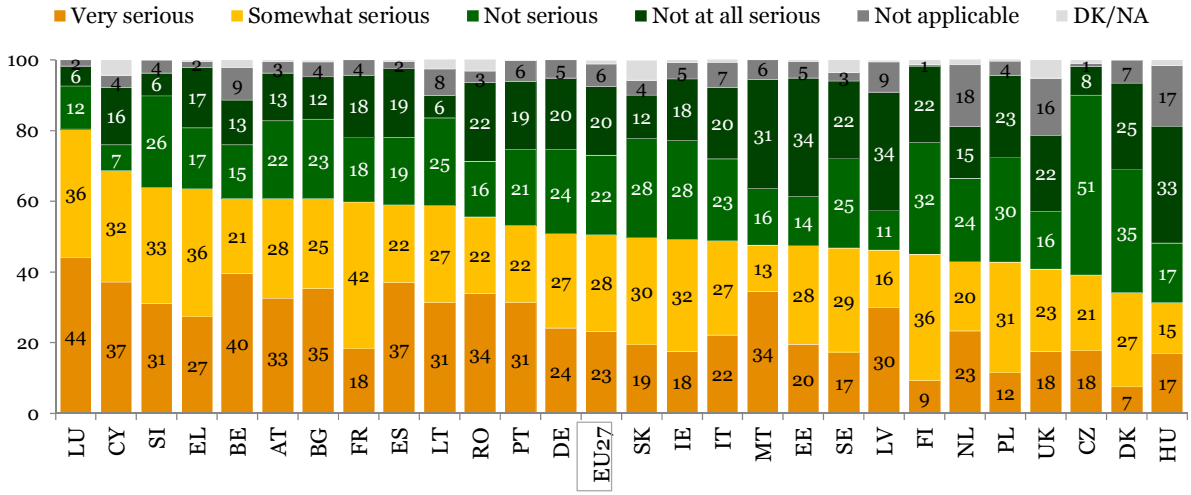
Base: all companies, % by country

Although managers in Hungary were each time among the most likely to answer that the financial barriers listed in the survey caused *very serious* concerns, they were less likely than their counterparts in other EU countries to worry about **a lack of qualified personnel and technological capabilities within their company**: 32% said this was a *very serious* or *somewhat serious* barrier to a faster uptake of eco-innovation in their company. Denmark was close to Hungary with 34% of respondents answering in the same way, but this proportion increased to 80% in Luxembourg.

Managers in Luxembourg were also the most likely to say that a lack of qualified personnel and technological capabilities within their company was a *very serious* barrier (44%), while managers in Hungary – together with those in Estonia and Latvia – were the most likely to answer that it was *not at all* a *serious* barrier (33%-34%).

Barriers to accelerated eco-innovation uptake and development for companies
Lack of qualified personnel and technological capabilities within the enterprise

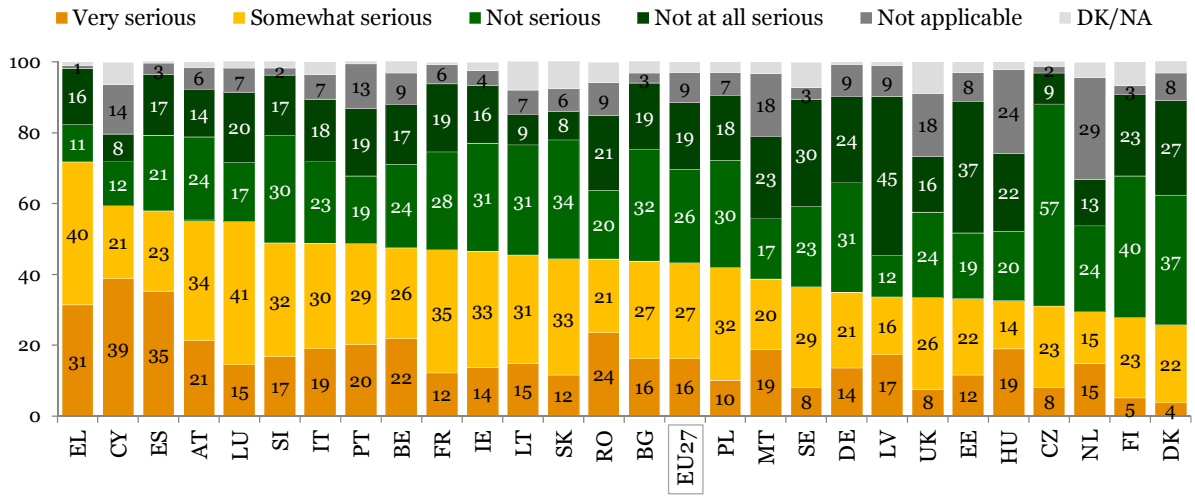


Q7. I will list you some barriers that could represent an obstacle to accelerated eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very serious, somewhat serious, not serious or not at all serious barrier in case of your company?
Base: all companies, % by country

Hungary was also found at the lower end of the country ranking when respondents were asked about a **limited access to external information and knowledge**, including a lack of well-developed technology support services: 33% said this was a *very serious* or *somewhat serious* barrier. In Denmark and Finland, less than 3 in 10 respondents answered in the same way (26% and 28%, respectively).

In Greece, however, roughly 7 in 10 (71%) respondents considered limited access to external information and knowledge to be a *very serious* or *somewhat serious* obstacle to the introduction of eco-innovation initiatives in their company; other countries where a majority of respondents shared this view were Austria (55%), Luxembourg (56%), Spain (58%) and Cyprus (60%). Nonetheless, Greece, Spain and Cyprus were the only countries where more than 3 in 10 respondents said that this was a *very serious* barrier (31%, 35% and 39%, respectively).

Barriers to accelerated eco-innovation uptake and development for companies
Limited access to external information and knowledge, including a lack of well-developed technology support services

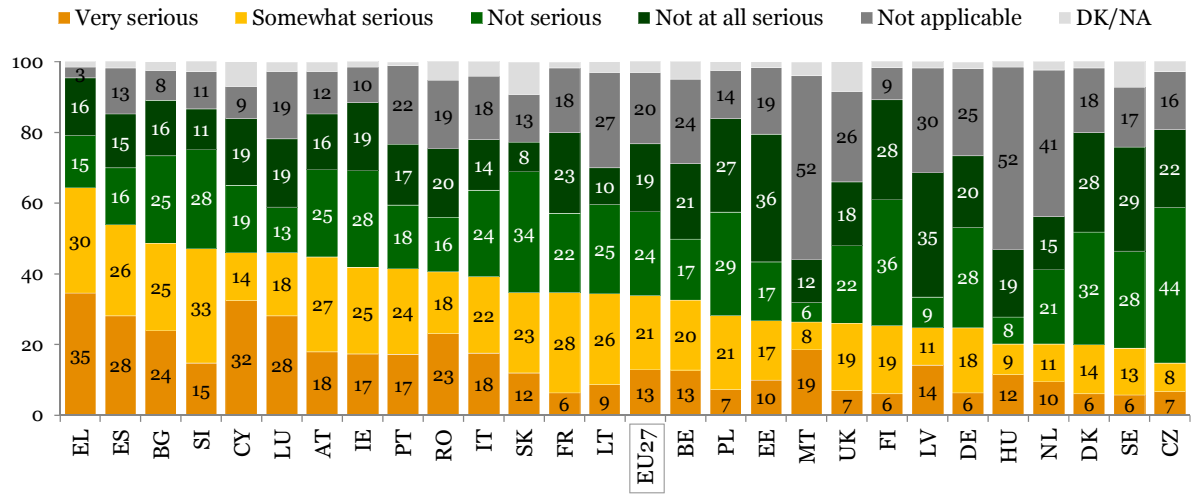


Q7. I will list you some barriers that could represent an obstacle to accelerated eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very serious, somewhat serious, not serious or not at all serious barrier in case of your company?
Base: all companies, % by country

Across most countries, respondents were less likely to think that a **lack of collaboration with research institutes and universities** was a barrier to eco-innovation in their company; for example, the proportion of "very serious" and "somewhat serious" responses remained below a third in about half of the countries (from 15% in the Czech Republic to 28% in Poland).

It should also be noted that, in almost all countries, a large proportion of respondents said that this question was not relevant to their own company; the proportion of "non-applicable" responses ranged from 3% in Greece to 52% in Malta and Hungary.

Barriers to accelerated eco-innovation uptake and development for companies
Lack of collaboration with research institutes and universities



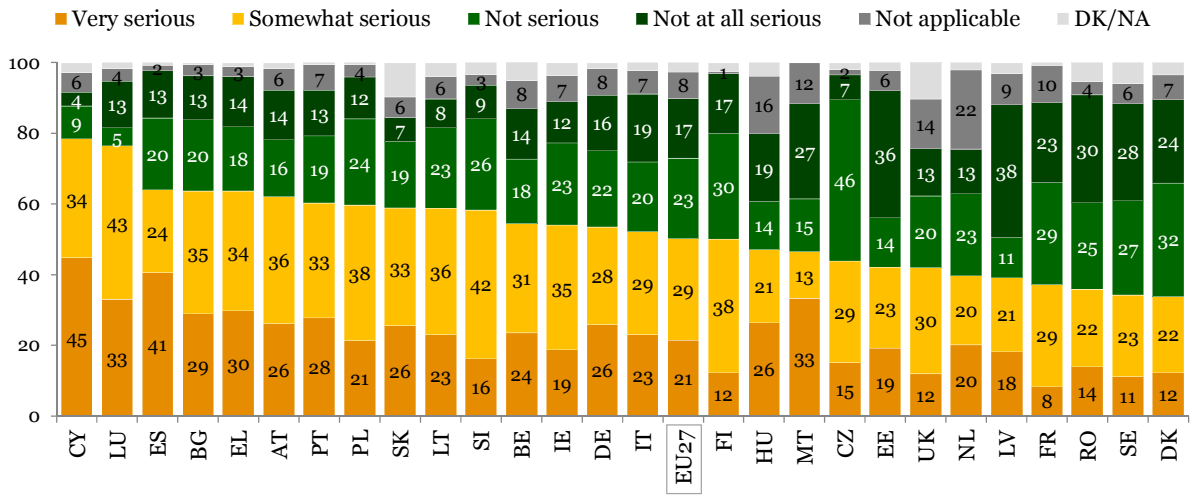
Q7. I will list you some barriers that could represent an obstacle to accelerated eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very serious, somewhat serious, not serious or not at all serious barrier in case of your company?
Base: all companies, % by country

Luxembourg and Cyprus stood out from the pack with more than three-quarters (76%-79%) of entrepreneurs who said that the **market was dominated by established companies** and that this was a *very serious* or *somewhat serious* barrier to the development of eco-innovations in their company.

In Cyprus, 45% of respondents identified this as a *very serious* barrier, but this proportion was lower in Luxembourg – at 33%. Spanish respondents were almost as likely as those in Cyprus to select this answer (41%); in France, however, the corresponding figure was just 8%.

Sweden, Denmark and the UK were close to France with slightly more than a tenth (11%-12%) of respondents who said that they were *very seriously* hindered because the market was dominated by established businesses. Nonetheless, respondents in Estonia and Latvia were the most likely to answer that this was *not at all* a *serious* barrier (36%-38%).

Barriers to accelerated eco-innovation uptake and development for companies
Market dominated by established enterprises



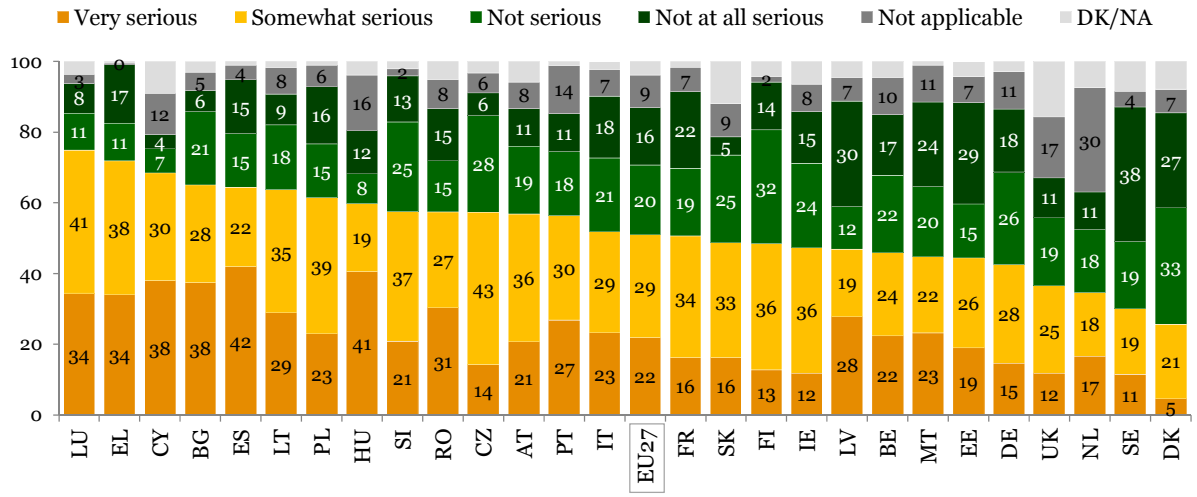
Q7. I will list you some barriers that could represent an obstacle to accelerated eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very serious, somewhat serious, not serious or not at all serious barrier in case of your company?
Base: all companies, % by country

Respondents in Cyprus and Luxembourg were also among the most likely to identify **technical and technological lock-ins** (e.g. an old technological infrastructure) as a *very serious* or *somewhat serious* barrier to the development of eco-innovations in their company (68%-75%). In a further five countries, this proportion was also higher than 6 in 10 (from 62% in Poland to 72% in Greece).

In four countries, less than 40% of respondents agreed that technical and technological lock-ins were a *very serious* or *somewhat serious* barrier to eco-innovation: 26% in Denmark, 30% in Sweden, 35% in the Netherlands and 37% in the UK.

Entrepreneurs in Sweden and Denmark were also the most likely to say that such lock-ins were *not a serious* or *not at all* a *serious* barrier (57% and 60%, respectively). In the Netherlands and the UK, however, only half as many respondents shared this view (29%-30%); in these countries, a considerable proportion of respondents thought that this barrier was not relevant or did not know how to answer.

Barriers to accelerated eco-innovation uptake and development for companies
Technical and technological lock-ins (e.g. old technical infrastructures)

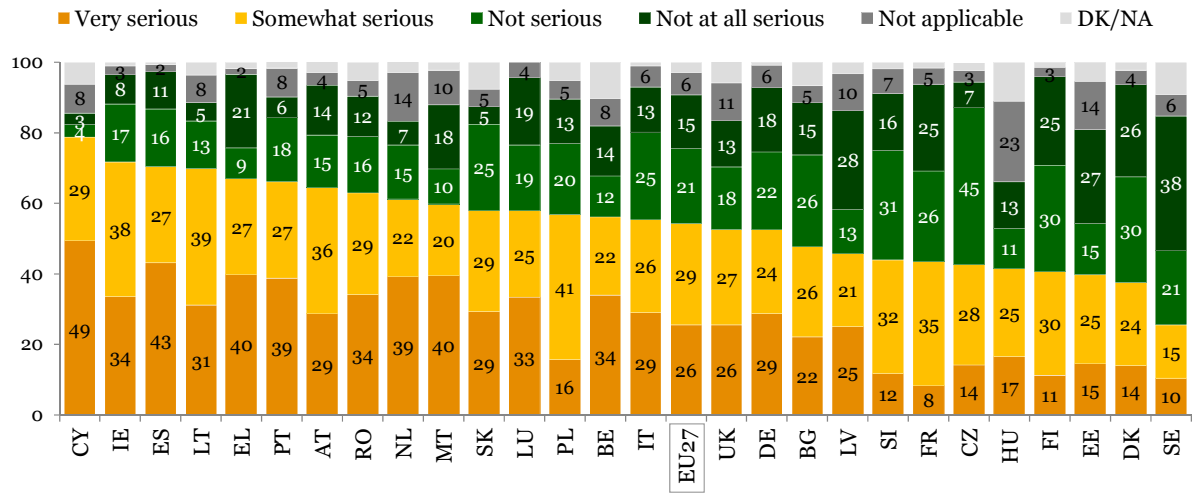


Q7. I will list you some barriers that could represent an obstacle to accelerated eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very serious, somewhat serious, not serious or not at all serious barrier in case of your company?
Base: all companies, % by country

In four Member States, at least 7 in 10 respondents answered that the fact that **reducing energy use was not an innovation priority** was a *very serious* or *somewhat serious* barrier to eco-innovation: 78% in Cyprus, 72% in Ireland and 70% in Spain and Lithuania. In 10 countries, less than half of respondents thought that reducing energy use was not an innovation priority, with respondents in Sweden leading the way in this view (25% of "very serious" and "somewhat serious" responses).

Respondents in Sweden were also – by far – the most likely to say that a low priority to reduce energy use was *not at all* a *serious* barrier to eco-innovation (38%); in Finland, France, Denmark, Estonia and Latvia, between 25% and 28% of respondents gave a similar answer.

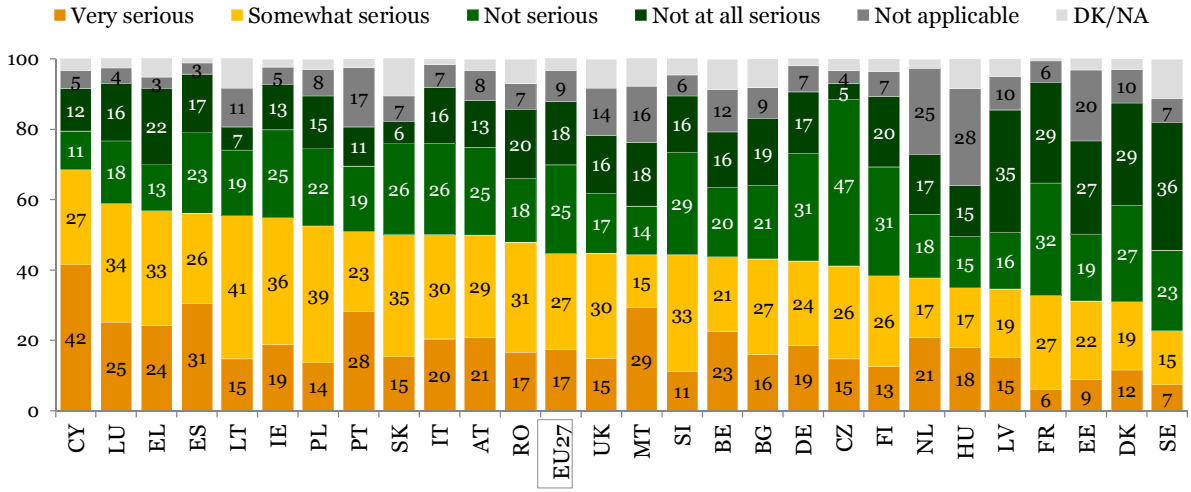
Barriers to accelerated eco-innovation uptake and development for companies
Reducing energy use is not an innovation priority



Q7. I will list you some barriers that could represent an obstacle to accelerated eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very serious, somewhat serious, not serious or not at all serious barrier in case of your company?
Base: all companies, % by country

A similar picture emerged when looking at the results for the proportion of respondents who doubted whether reducing material use was an innovation priority. The proportion of respondents who thought that the fact that **reducing material use was not an innovation priority** was a *very* or *somewhat serious* barrier ranged from 22% in Sweden to 69% in Cyprus. Moreover, the proportion of respondents who thought that this was *not at all* a *serious* barrier was as low as 5% in the Czech Republic and as high as 36% in Sweden.

Barriers to accelerated eco-innovation uptake and development for companies
Reducing material use is not an innovation priority



Q7. I will list you some barriers that could represent an obstacle to accelerated eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very serious, somewhat serious, not serious or not at all serious barrier in case of your company?
Base: all companies, % by country

The table on the next page shows – for each country – the barriers to an accelerated development and uptake of eco-innovation that respondents were the most likely to identify as serious ones (i.e. the sum of "very serious" and "somewhat serious" responses).

Of the 14 barriers listed in the survey, three could be identified as being mentioned most frequently as a *very serious* or *somewhat serious* barrier to an accelerated uptake of eco-innovation in respondents' companies: (1) uncertain demand from the market, (2) lack of funds within the enterprise and (3) an uncertain return on investment or too long a payback period for eco-innovations.

In 20 Member States, some of the largest proportions of respondents said that an **uncertain demand from the market** was a barrier to a faster uptake of eco-innovation. For example, 82% of respondents in Spain said that this was a *very serious* or *somewhat serious* barrier for their company (first position). The barriers in second and third position – both described as *very serious* or *somewhat serious* by 80% of Spanish respondents – were **a lack of funds within the company** and **uncertainty about investment returns and payback periods**. Each of the latter barriers appeared in the top three barriers, receiving the highest proportions of "serious" responses in a majority of the Member States.

Barriers to an accelerated eco-innovation uptake and development

(sum of "very serious" and "somewhat serious" responses)

BE	%	BG	%	CZ	%
Lack of qualified personal	61	Uncertain demand from the market	76	Lack of funds within the enterprise	69
Uncertain demand from the market	59	Uncertain return on investment	76	Uncertain return on investment	68
Reducing energy use is not an innovation priority	56	Lack of funds within the enterprise	75	Uncertain demand from the market	63
DK	**%**	**DE**	**%**	**EE**	**%**
Uncertain demand from the market	60	Uncertain return on investment	61	Uncertain demand from the market	61
Uncertain return on investment	59	Uncertain demand from the market	58	Uncertain return on investment	59
Existing regulations not providing incentives	41	Market dominated by established enterprises	53	Lack of funds within the enterprise	53
EL	**%**	**ES**	**%**	**FR**	**%**
Lack of external financing	89	Uncertain demand from the market	82	Uncertain demand from the market	66
Lack of funds within the enterprise	84	Lack of funds within the enterprise	80	Insufficient access to existing subsidies	66
Existing regulations not providing incentives	83	Uncertain return on investment	80	Uncertain return on investment	64
IE	**%**	**IT**	**%**	**CY**	**%**
Uncertain demand from the market	72	Uncertain demand from the market	71	Insufficient access to existing subsidies	83
Reducing energy use is not an innovation priority	72	Lack of funds within the enterprise	68	Lack of funds within the enterprise	80
Lack of funds within the enterprise	67	Lack of external financing	66	Reducing energy use is not an innovation priority	79
LV	**%**	**LT**	**%**	**LU**	**%**
Lack of funds within the enterprise	67	Lack of funds within the enterprise	74	Lack of qualified personnel	80
Insufficient access to existing subsidies	60	Reducing energy use is not an innovation priority	70	Market dominated by established enterprises	76
Existing regulations not providing incentives	57	Insufficient access to existing subsidies	67	Technical and technological lock-ins in economy	75
HU	**%**	**MT**	**%**	**NL**	**%**
Lack of funds within the enterprise	71	Uncertain demand from the market	79	Uncertain return on investment	63
Uncertain demand from the market	71	Insufficient access to existing subsidies	76	Reducing energy use is not an innovation priority	61
Uncertain return on investment	70	Uncertain return on investment	76	Uncertain demand from the market	53
AT	**%**	**PL**	**%**	**PT**	**%**
Insufficient access to existing subsidies	73	Uncertain demand from the market	76	Uncertain demand from the market	69
Uncertain return on investment	70	Uncertain return on investment	75	Reducing energy use is not an innovation priority	66
Existing regulations not providing incentives	69	Lack of funds within the enterprise	71	Lack of funds within the enterprise	64
RO	**%**	**SI**	**%**	**SK**	**%**
Lack of funds within the enterprise	71	Lack of funds within the enterprise	75	Uncertain return on investment	74
Insufficient access to existing subsidies	71	Insufficient access to existing subsidies	72	Lack of funds within the enterprise	71
Uncertain demand from the market	71	Uncertain return on investment	65	Uncertain demand from the market	71
FI	**%**	**SE**	**%**	**UK**	**%**
Uncertain return on investment	68	Uncertain return on investment	49	Uncertain demand from the market	55
Uncertain demand from the market	66	Uncertain demand from the market	49	Reducing energy use is not an innovation priority	53
Existing regulations not providing incentives	60	Lack of qualified personnel	47	Uncertain return on investment	52

Q7. I will list you some barriers that could represent an obstacle to accelerated eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very serious, somewhat serious, not serious or not at all serious barrier in case of your company?

Base: all companies, % EU27

Company characteristics

For most of the barriers listed in the survey, respondents in small companies (in terms of workforce or annual turnover) were more likely than those in the larger (medium-size) companies to describe the barrier presented to them as being *very* or *somewhat serious*. For example, 32% of managers of medium-sized companies, as opposed to 42% of managers in small ones, answered that a lack of suitable business partners was a *very serious* or *somewhat serious* barrier to eco-innovation. Similarly, while 34% of respondents in companies with an annual turnover of more than €50 million thought that limited access to external knowledge and a lack of well-developed technology support services were *very serious* or *somewhat serious* barriers to an accelerated uptake of eco-innovation in their company, this proportion increased to 45% among respondents in companies with an annual turnover of less than €2 million.

Respondents in companies that had experienced a decrease in turnover in the past two years were each time more likely to answer that the financial barriers listed in the survey stopped them from introducing eco-innovations. For example, 71% of these respondents said that a lack of funds within their enterprise was a *very serious* or *somewhat serious* barrier to eco-innovation and 64% said the same about a lack of external funds; the corresponding figures for respondents in companies that had seen an increase in turnover were 55% and 49%, respectively.

In terms of main activities, companies in the agriculture sector were the most likely to describe various obstacles as being *very serious* or *somewhat serious*, while those in the water supply and waste management, and the food services sectors were frequently less likely to do so. For example, 54% of managers in agricultural businesses said that a lack of qualified personnel and technological capabilities was a serious obstacle for eco-innovation developments, compared to 44% of managers in the water supply and waste management sector. Similarly, 60% of the former group of managers identified technical and technological lock-ins as a barrier to a faster uptake of eco-innovation in their company, compared to 46% of managers in food services companies.

Material-intensive companies and less material-intensive companies also differed in their views about barriers to eco-innovation, but no clear pattern emerged when these differences were analysed. The largest difference was seen in the proportion of respondents who said that uncertainty about the return on investment and a long payback period for eco-innovations were serious barriers; 58% of respondents in companies with material costs accounting for less than 10% of the total said this was a *very serious* or *somewhat serious barrier*, compared to 66%-68% in more material-intensive companies.

Finally, for each of the barriers listed in the survey, respondents in companies that had introduced at least one eco-innovation in the past two years were more likely to describe this barrier as being *very serious* or *somewhat serious*. For example, 72% of managers in eco-innovative companies said that an uncertain demand from the market was a barrier to a faster uptake of eco-innovation in their company; the corresponding proportion in companies that had not introduced any eco-innovations in the past two years was 63%.

For more details, see annex table 22b through 35b.

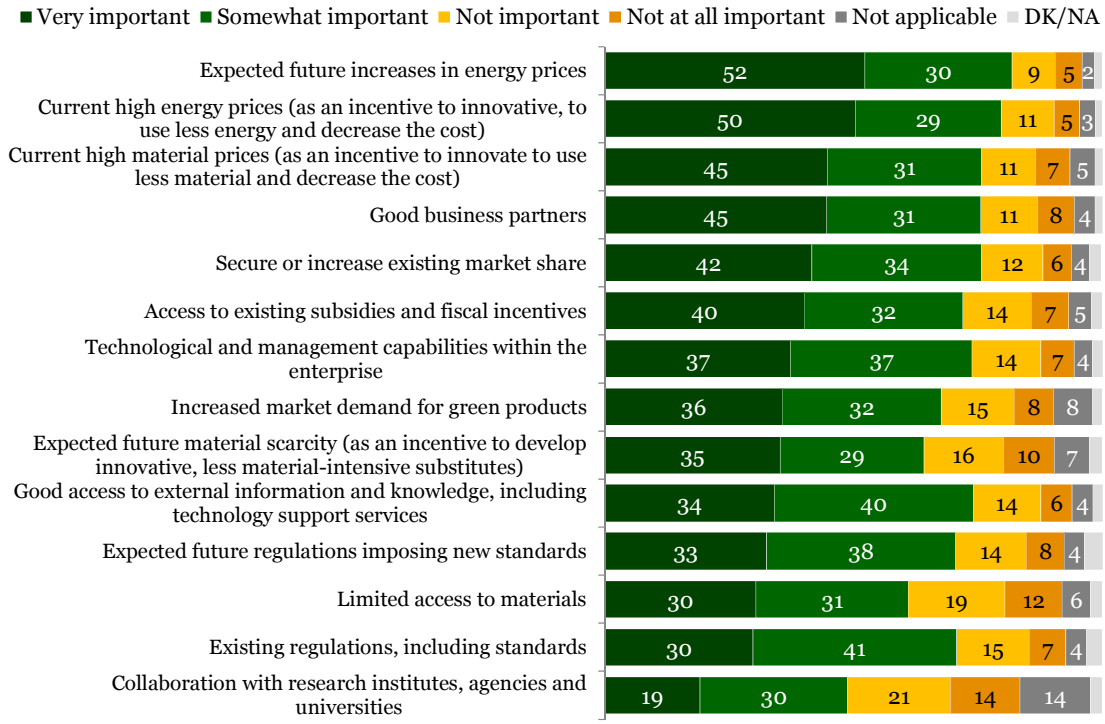
4. Drivers for an accelerated uptake of eco-innovation

This chapter analyses managers' views about drivers that could accelerate the development and uptake of eco-innovation in their company. Interviewees were presented with 14 potential drivers and were asked, for each one, whether they considered these to be important or not for a faster uptake of eco-innovation in their company.

For 10 of the 14 drivers listed in the survey, more than 70% of respondents said that it was a *very* or *somewhat important* driver of eco-innovation uptake and development in their company. A larger variation, however, was seen in the proportion of "very important" responses for each of the 14 potential drivers.

One in two respondents considered **current high energy prices** to be a *very important* driver to accelerate eco-innovation uptake and development in their company and a similar proportion (52%) said the same about the **expected *future* increases in energy prices**. Although 45% of respondents also thought that **current high material prices** were a *very important* driver of eco-innovation uptake in their company, the proportion saying the same about **limited access to materials** was considerably lower – at 30%. Somewhat more than a third (35%) of interviewees said that the **expected *future* material scarcity** was a *very important* driver of eco-innovation.

Drivers that could accelerate eco-innovation uptake and development



Q8. I will list you some drivers that could accelerate eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very important, somewhat important, not important or not at all important driver in case of your company?
Base: all companies, % EU27

Securing or increasing their company's existing market share was mentioned as a *very important* driver of eco-innovation developments by 42% of respondents and **access to existing subsidies and fiscal incentives** was described as being *very important* by 40% of entrepreneurs. **Existing regulations and standards** and **expected *future* regulations and new standards** were considered *very important* eco-innovation drivers by, respectively, 30% and 33% of respondents.

Almost 4 in 10 (37%) managers said that **technological and management capabilities within their enterprise** were a *very important* driver of eco-innovations and roughly a third (34%) answered in the

same way when asked about the importance of **good access to external information and knowledge, including technology support services**.

It was noted in the previous chapter that roughly a sixth (16%) of respondents believed that a lack of suitable business partners was a *very serious barrier* to eco-innovation; however, three times as many respondents (45%) said that having **good business partners** could be a *very important driver* of accelerated eco-innovation development.

Similarly, it was noted before that roughly a third (34%) of respondents thought that uncertain demand from the market was a *very serious barrier* to eco-innovation; at the same time, a similar proportion (36%) identified an **increasing market demand for green products** as a *very important driver*.

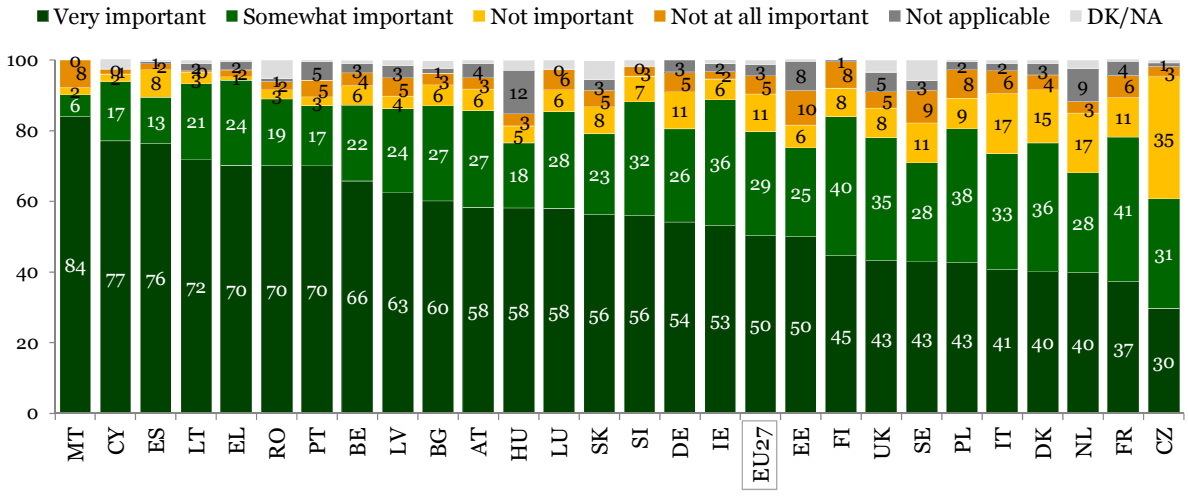
Finally, respondents were the least likely to answer that **collaboration with research institutes, agencies and universities** was a *very important* driver of eco-innovation initiatives in their company (19%); this is in accordance with the finding that respondents were also the least likely to think that a lack of such cooperation could be a *very serious barrier* to eco-innovation uptake in their company.

Country variations

Across most countries, more than three-quarters of interviewees said that **current high energy prices** were a *very* or *somewhat important* driver of an accelerated eco-innovation uptake and development in their company. Furthermore, in three countries, more than 9 in 10 respondents said that current energy prices were *very* or *somewhat important*: Lithuania (93%), Cyprus and Greece (both 94%).

The proportion of entrepreneurs who said that current high energy prices were a *very important* driver, however, showed more variation across Member States. More than 8 in 10 entrepreneurs in Malta (84%), and roughly three-quarters of those in Spain and Cyprus (76%-77%), said that this driver was *very important* to stimulate eco-innovation; in France and the Czech Republic, on the other hand, less than 4 in 10 respondents selected the same response (37% and 30%, respectively).

Drivers that could accelerate eco-innovation uptake and development
Current high energy prices

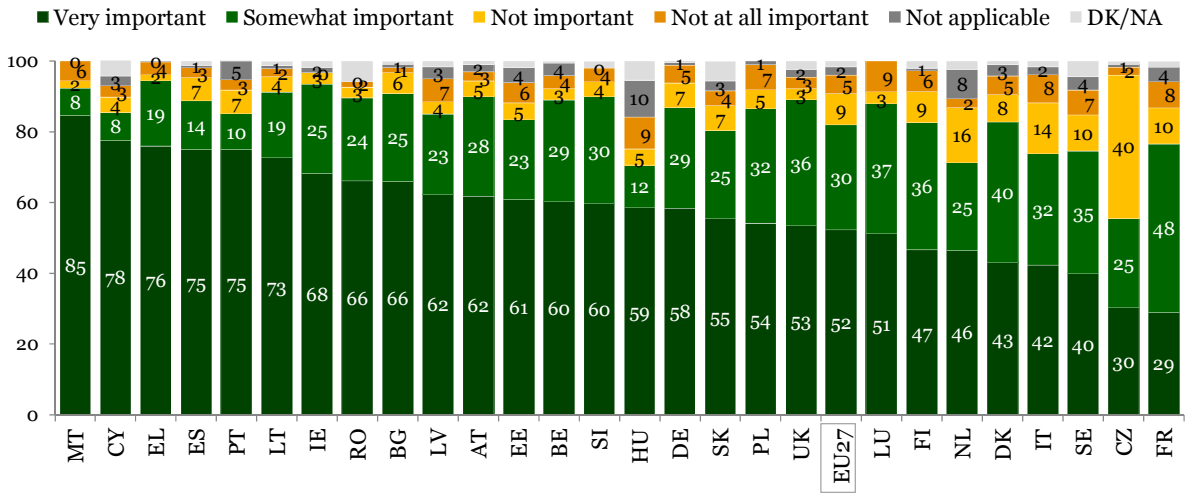


Q8. I will list you some drivers that could accelerate eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very important, somewhat important, not important or not at all important driver in case of your company?
Base: all companies, % by country

A similar picture emerged when looking at the individual country results for the **expected increases in energy prices**. In all countries, except for the Czech Republic, more than 70% of respondents said that the expected increases in energy prices were a *very* or *somewhat important* driver to introduce eco-innovations. Furthermore, in about half of the Member States, not more than a tenth of respondents doubted whether this was an important driver of eco-innovation – i.e. they said that expected increases in energy prices were *not important* or *not at all important*.

The Czech Republic – once more – stood out from the pack with somewhat more than 4 in 10 managers who answered that expected increases in energy prices were not an important driver of eco-innovation. Nonetheless, although 40% of Czech respondents said that this driver was *not important*, just 2% said it was *not at all important*.

Drivers that could accelerate eco-innovation uptake and development
Expected future increases in energy prices

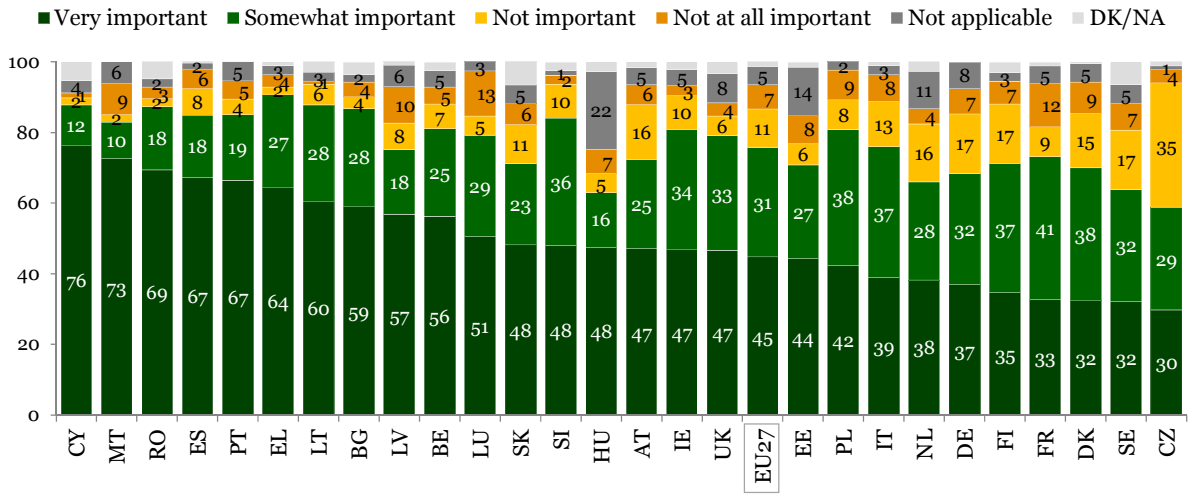


Q8. I will list you some drivers that could accelerate eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very important, somewhat important, not important or not at all important driver in case of your company?
Base: all companies, % by country

A majority of respondents across all countries also agreed that the **current high material prices** were an important driver of eco-innovation in their company (from 59% in the Czech Republic to 91% in Greece). Nonetheless, in most countries, the proportion thinking that high material prices were a driver of eco-innovation was lower than the proportion saying the same about high energy prices.

The proportion of "very important" responses ranged from less than a third in the Czech Republic, Sweden and Denmark (30%-32%) to more than double that number in Portugal, Spain, Romania, Malta and Cyprus (67%-76%).

Drivers that could accelerate eco-innovation uptake and development
Current high material prices



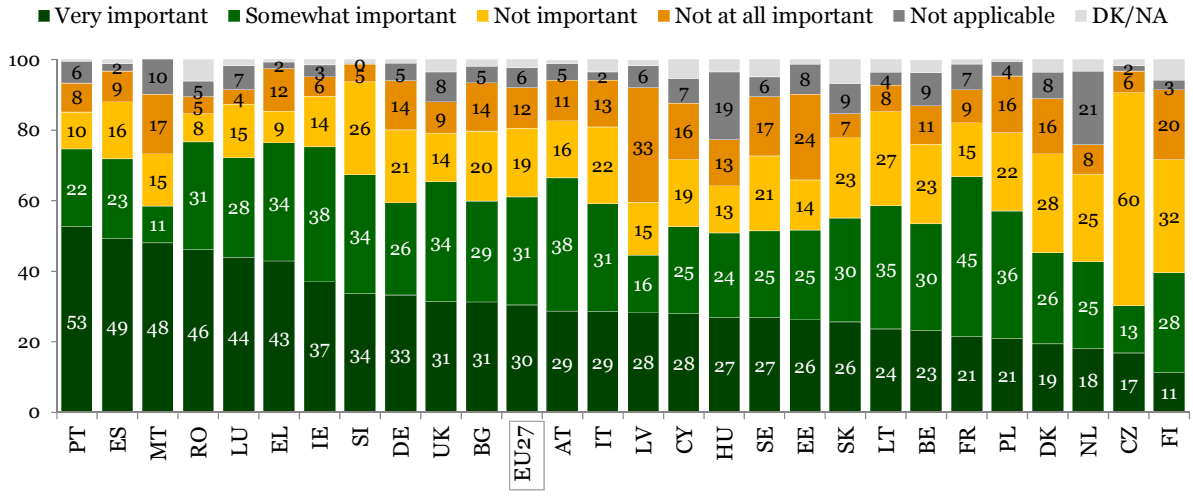
Q8. I will list you some drivers that could accelerate eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very important, somewhat important, not important or not at all important driver in case of your company?
Base: all companies, % by country

Although in 21 Member States, more than 7 in 10 managers agreed that current high material prices could drive eco-innovation uptake in their companies, there were only six Member States where more than 7 in 10 respondents said that **limited access to materials** was a *very* or *somewhat important* driver of eco-innovation uptake (from 72% in Spain to 77% in Romania and Greece).

In Portugal, a slim majority (53%) of respondents thought that a limited access to materials was a *very important* driver of eco-innovative initiatives in their company; in Malta and Spain, almost one in two respondents gave a similar response (48%-49%).

Respondents in the Czech Republic were – once again – the most likely to say that this driver was not important (60% "not important" and 6% "not at all important" responses); however, respondents in Latvia were the most likely to say that limited access to materials was *not at all important* as a driver of eco-innovation (33%).

Drivers that could accelerate eco-innovation uptake and development
Limited access to materials



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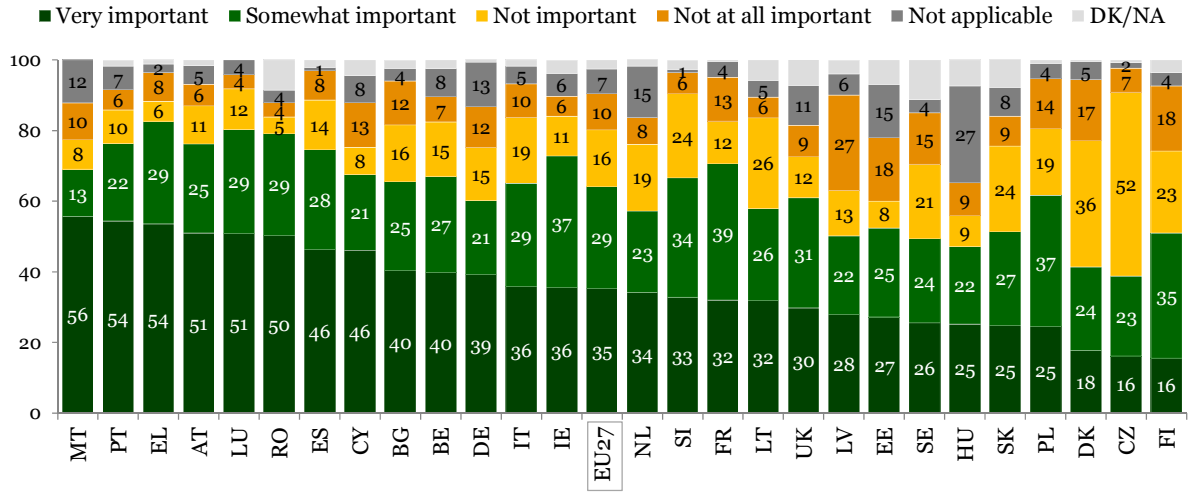
Base: all companies, % by country

Only in one country – Greece – did more than 8 in 10 (83%) respondents say that the **expected future material scarcity** was a *very* or *somewhat important* driver of eco-innovation development in their company. A slim majority (54%) of Greek respondents said that this driver was *very important*; similar figures were observed in Luxembourg, Austria, Portugal and Malta (51%-56% of "very important" responses).

In two countries – Denmark and the Czech Republic – a majority of entrepreneurs believed that future material scarcity was *not important* or *not at all important* as a driver of eco-innovation in their company (53% and 59%, respectively). In the Czech Republic, just 7% of managers selected the "very important" response; this proportion was 10 percentage points higher in Denmark (17%). Respondents in Latvia were – once again – the most likely to say that this potential driver of eco-innovation was *not at all important* (27%).

Drivers that could accelerate eco-innovation uptake and development

Expected future material scarcity



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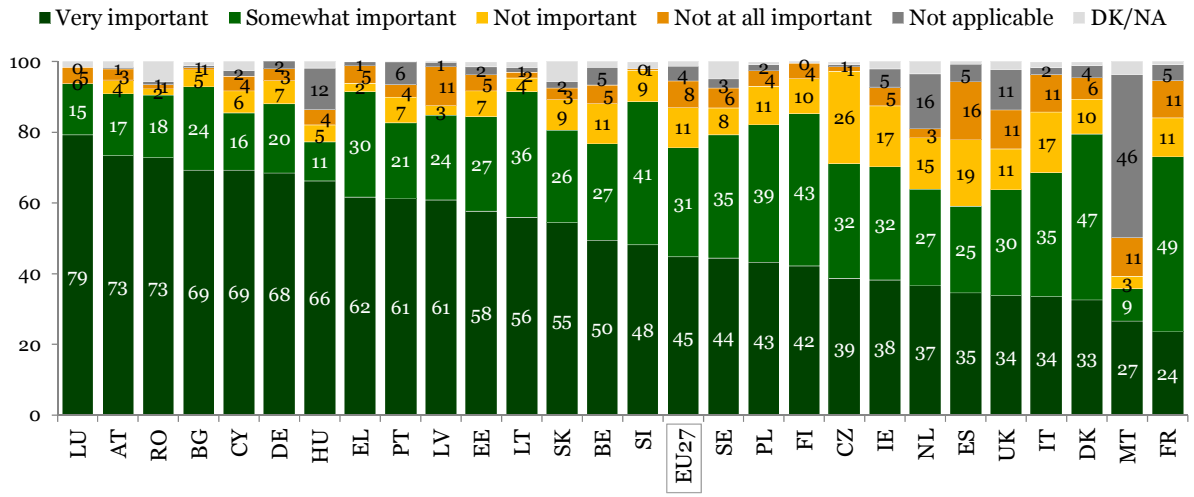
Base: all companies, % by country

In all Member States (except Malta), at least 60% of respondents answered that **good business partners** were *very* or *somewhat important* drivers of accelerated eco-innovation development and uptake. In 10 Member States, more than 60% of respondents even said that having good business partners was *very important* (from 61% in Latvia and Portugal to 79% in Luxembourg).

In Malta, just 36% of managers said that good business partners were important drivers of eco-innovation. As for the question about barriers to eco-innovation, almost half (46%) of Maltese respondents did not consider this question about business partners to be relevant.

Drivers that could accelerate eco-innovation uptake and development
Good business partners



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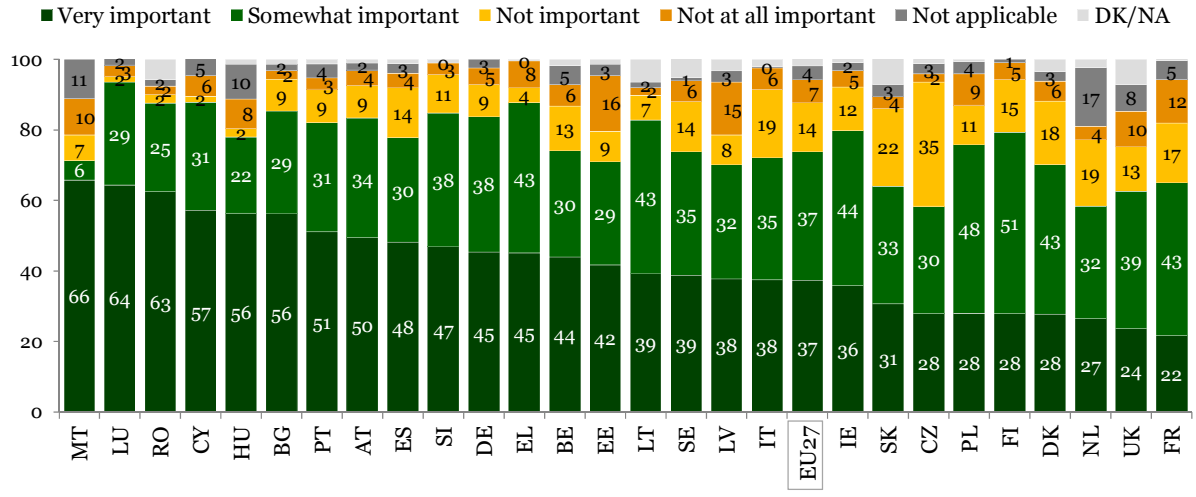
Base: all companies, % by country

The proportion of respondents who said that **technological and management capabilities within their company** were a *very* or *somewhat important* driver of eco-innovation development varied between 58%-59% in the Czech Republic and the Netherlands and 93% in Luxembourg. Similarly, the proportion of "very important" responses ranged from less than a quarter in France and the UK (22%-24%) to more than 6 in 10 in Romania, Luxembourg and Malta (63%-66%).

The largest proportion of "not important" and "not at all important" responses was observed in the Czech Republic (37%); this proportion was between 24% and 29% in Denmark, Estonia, Italy, Slovakia and France.

Drivers that could accelerate eco-innovation uptake and development
Technological and management capabilities within the enterprise



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Base: all companies, % by country

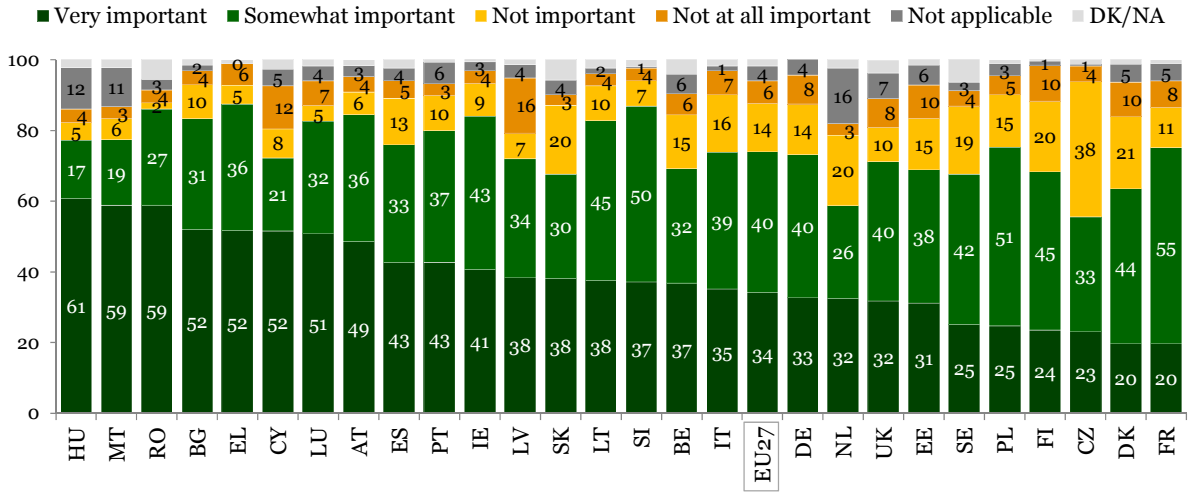
Entrepreneurs in the Czech Republic and the Netherlands were also the least likely to believe that **good access to external knowledge and technology support services** could be important to stimulate eco-innovation uptake in their company (56% and 58%, respectively). Roughly a third (32%) of respondents in the Netherlands said that this factor was *very important*, this proportion decreased to 23% in the Czech Republic; a figure similar to the one observed in France and Denmark (both 20%).

Respondents in Austria, Romania, Greece and Slovenia were the most likely to answer that good access to external knowledge and technology support services was a *very important* or *somewhat important* driver of eco-innovation in their company (between 85% and 87%).

Almost 4 in 10 (37%) managers in Slovenia and about half of those in Austria and Greece (49%-52%) said that this eco-innovation driver was *very important*; in Romania, however, this proportion was higher – at 59%. In two other countries, roughly 6 in 10 respondents said that access to external knowledge and technology support services was *very important*: Hungary (61%) and Malta (59%).

Drivers that could accelerate eco-innovation uptake and development

Good access to external information and knowledge, including technology support services



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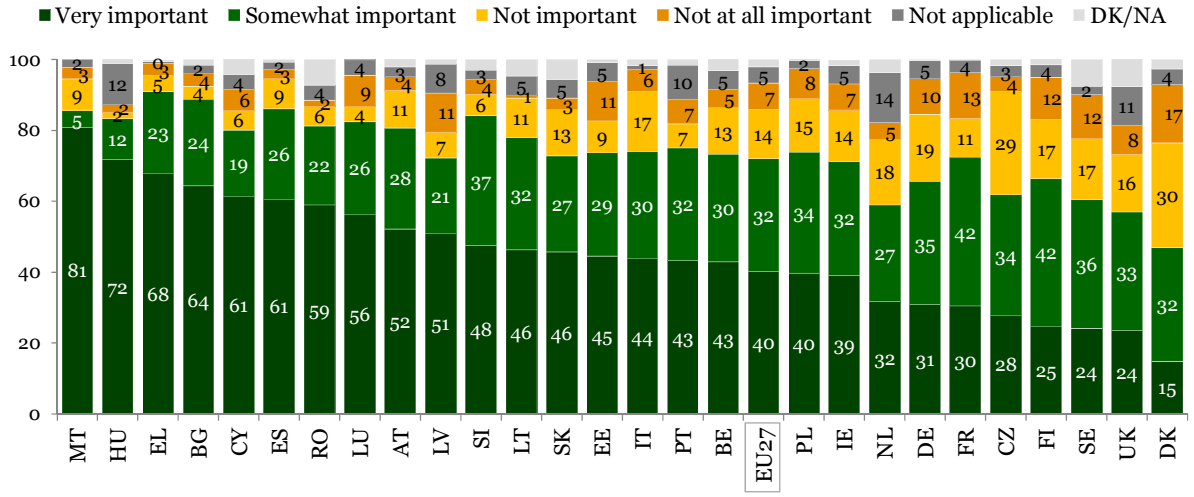
Base: all companies, % by country

Roughly 9 in 10 (91%) entrepreneurs in Greece said that **access to existing subsidies and fiscal incentives** was a *very* or *somewhat important* driver of eco-innovation development; about two-thirds (68%) of respondents in this country thought that such access was *very important*. Respondents in Hungary and Malta, however, were even more likely to answer that access to existing subsidies and fiscal incentives was *very important* to accelerate eco-innovation development in their company (72% and 81%, respectively).

Denmark was the only country where less than half (47%) of respondents considered access to existing subsidies and fiscal incentives to be important as an eco-innovation driver; the same proportion said that this type of access was *not important* or *not at all important* for their company.

Drivers that could accelerate eco-innovation uptake and development
Access to existing subsidies and fiscal incentives



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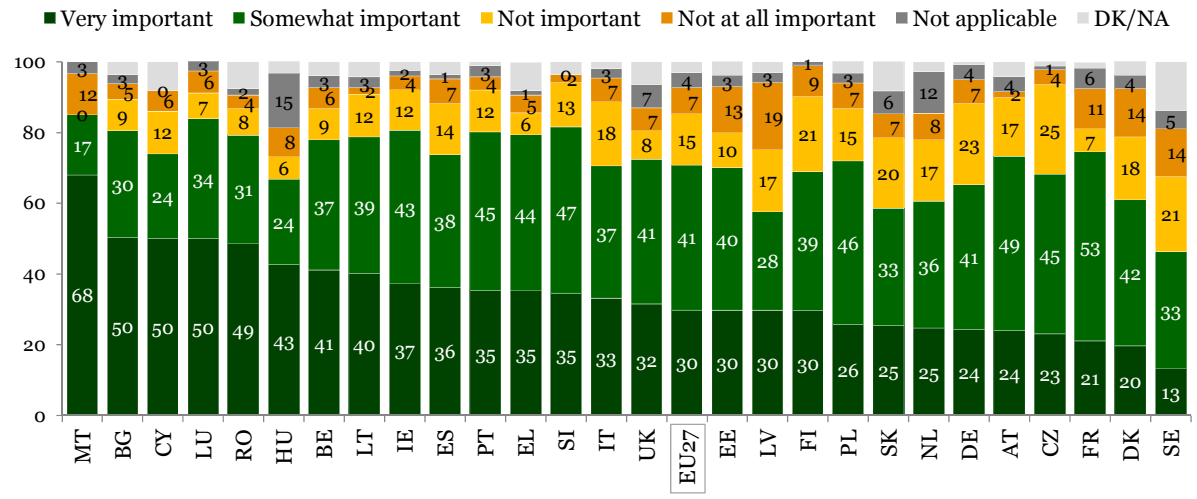
Base: all companies, % by country

There was also only one country – Sweden – where less than half (46%) of respondents answered that **existing regulations and standards** were important drivers of eco-innovation. In Slovenia, Luxembourg and Malta, on the other hand, more than 80% of respondents said that existing regulations and standards were *very* or *somewhat important* drivers of eco-innovation in their company (82%-85%).

Malta stood out with 68% of "very important" responses; in all other countries, between 13% and 50% of respondents thought that existing regulations and standards were *very important* to accelerate eco-innovation development in their company.

Drivers that could accelerate eco-innovation uptake and development
Existing regulations, including standards



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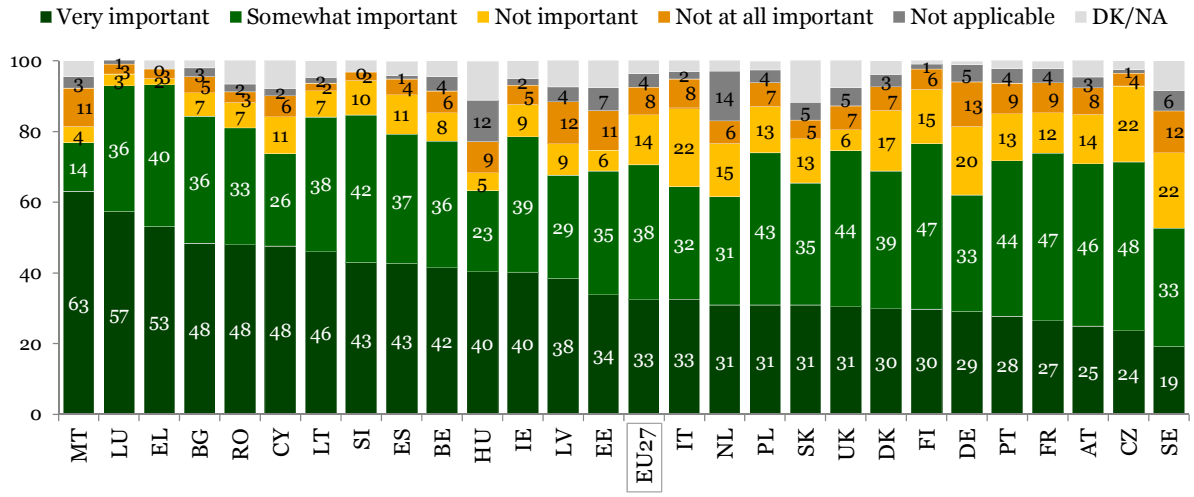
Base: all companies, % by country

Entrepreneurs in Sweden were also the least likely to consider that **expected future regulations, imposing new standards**, was a driver of eco-innovation in their company (19% "very important" and 33% "somewhat important" responses). About a third (34%) of Swedes answered that this factor was *not important* or *not at all important* as an eco-innovation driver; a figure similar to the one observed in Germany (33%).

Looking at the sum of "very important" and "somewhat important" responses, the highest numbers were observed in Greece and Luxembourg (both 93%). A focus on the "very important" responses, however, showed that respondents in Malta were again the most likely to select this response (63%). In Greece and Luxembourg, a slim majority of respondents said that expected future regulations were *very important* to stimulate eco-innovation development in their company (53% and 57%, respectively).

Drivers that could accelerate eco-innovation uptake and development
Expected future regulations imposing new standards



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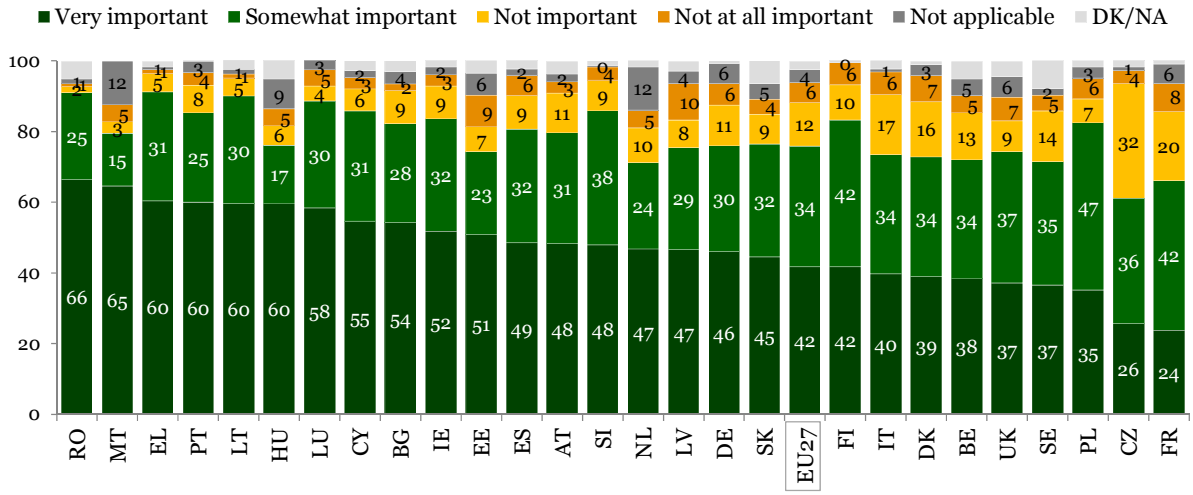
Base: all companies, % by country

The proportion of respondents who said that **securing or increasing their company's market share** was *very* or *somewhat important* as a driver of eco-innovation ranged from 62% in the Czech Republic to 90%-91% in Lithuania, Greece and Romania. Respondents in the Czech Republic – together with those in France – were also the least likely to say that this driver was a *very important* one (24%-26%), while respondents in Romania – together with those in Malta – were the most likely to say so (65%-66%).

Drivers that could accelerate eco-innovation uptake and development
Secure or increase existing market share



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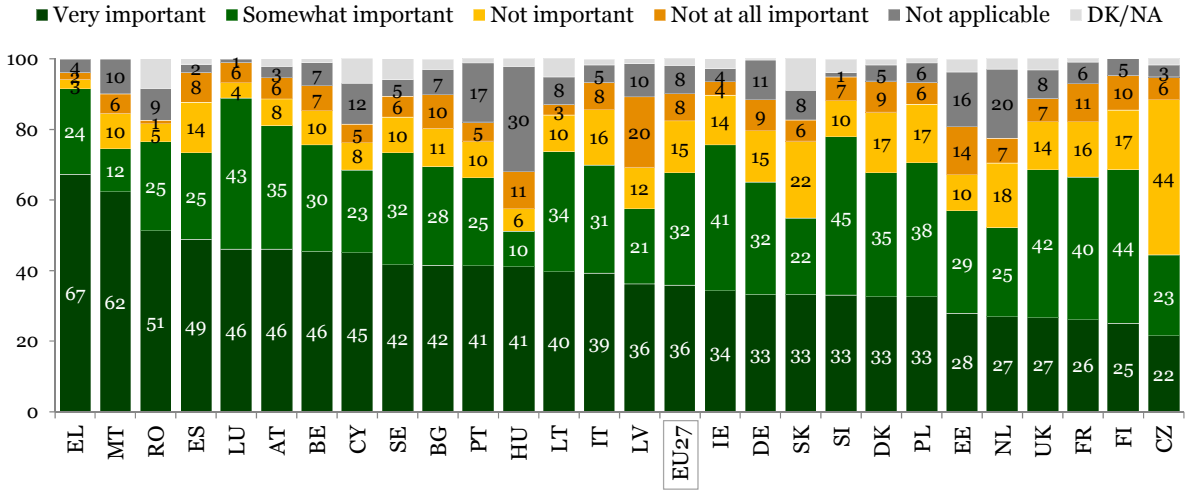
Base: all companies, % by country

The proportion of respondents who identified an **increasing market demand for green products** as a *very important* driver of eco-innovation ranged from 22% in the Czech Republic to 67% in Greece. Malta was close to Greece with 62% of "very important" responses. Finland, France, the UK, the Netherlands and Estonia joined the Czech Republic at the lower end of the distribution – in these countries, between 25% and 28% of interviewees said that the increasing market demand for green products was a *very important* driver of eco-innovation developments in their company.

In the Czech Republic, one in two respondents said that an increasing demand for green products was *not important* or *not at all important* as an eco-innovation driver; in all other countries, however, less than a third of respondents gave a similar response (from 5% in Greece to 32% in Latvia).

Drivers that could accelerate eco-innovation uptake and development
Increased market demand for green products



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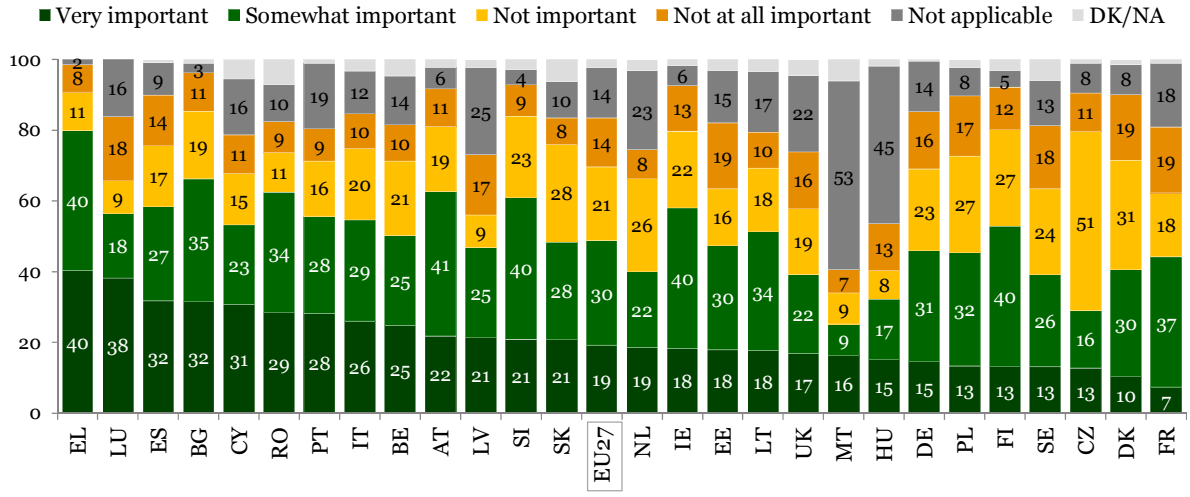
Base: all companies, % by country

The proportions of respondents who said that the question about **collaboration with research institutes, agencies and universities** was not relevant in the context of their own company were – once again (see previous chapter) – the highest in Hungary and Malta (45% and 53%, respectively). However, in several other countries, a considerable proportion said that this question was "not applicable"; for example, 22% in the UK, 23% in the Netherlands and 25% in Latvia.

Respondents in Greece were the most likely to answer that collaboration with research institutes, agencies and universities was an important driver of eco-innovation initiatives in their company (40% "very important" and 40% "somewhat important" responses); it was noted in the previous chapter that Greek respondents were also the most likely to think that a lack of such cooperation was a serious barrier to eco-innovation uptake in their company.

Drivers that could accelerate eco-innovation uptake and development
Collaboration with research institutes, agencies and universities



Q8. I will list you some drivers that could accelerate eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very important, somewhat important, not important or not at all important driver in case of your company?
Base: all companies, % by country

The table on the next page shows – for each country – the drivers for accelerated eco-innovation development and uptake that respondents most frequently identified as being *very important* ones.

Of the 14 drivers listed in the survey, *current* and *future* **high energy prices** were mentioned most frequently as being *very important* drivers of accelerated eco-innovation uptake in respondents' companies. In 19 Member States, both the current and expected *future* high energy prices were mentioned by some of the largest proportions of respondents. In a further six Member States, either current or future high energy prices appeared in the top three drivers that received the highest proportions of "very important" responses.

The table also shows that there was considerable variation across the Member States in the proportions of entrepreneurs that identified each of the potential drivers as being *very important* for eco-innovation uptake and development. For example, in the Czech Republic and France, the proportion of "very important" responses for each of the 14 potential drivers remained below 40%. In Malta, on the other hand, at least 80% of respondents described the highest ranked drivers as being *very important*.

Drivers for an accelerated eco-innovation uptake and development

(proportion of "very important" responses)

BE	%	BG	%	CZ	%
Current high energy prices	66	Good business partners	69	Good business partners	39
Expected future increases in energy prices	60	Expected future increases in energy prices	66	Expected future increases in energy prices	30
Current high material price	56	Access to existing subsidies and fiscal incentives	64	Current high material price	30
DK	**%**	**DE**	**%**	**EE**	**%**
Expected future increases in energy prices	43	Good business partners	68	Expected future increases in energy prices	61
Current high energy prices	40	Expected future increases in energy prices	58	Good business partners	58
Secure or increase existing market share	39	Current high energy prices	54	Secure or increase existing market share	51
EL	**%**	**ES**	**%**	**FR**	**%**
Expected future increases in energy prices	76	Current high energy prices	76	Current high energy prices	37
Current high energy prices	70	Expected future increases in energy prices	75	Current high material price	33
Access to existing subsidies and fiscal incentives	68	Current high material price	67	Expected future material scarcity	32
IE	**%**	**IT**	**%**	**CY**	**%**
Expected future increases in energy prices	68	Access to existing subsidies and fiscal incentives	44	Expected future increases in energy prices	78
Current high energy prices	53	Expected future increases in energy prices	42	Current high energy prices	77
Secure or increase existing market share	52	Current high energy prices	41	Current high material price	76
LV	**%**	**LT**	**%**	**LU**	**%**
Current high energy prices	63	Expected future increases in energy prices	73	Good business partners	79
Expected future increases in energy prices	62	Current high energy prices	72	Technological and management capabilities	64
Good business partners	61	Current high material price	60	Secure or increase existing market share	58
HU	**%**	**MT**	**%**	**NL**	**%**
Access to existing subsidies and fiscal incentives	72	Expected future increases in energy prices	85	Secure or increase existing market share	47
Good business partners	66	Current high energy prices	84	Expected future increases in energy prices	46
Good access to external information and knowledge	61	Access to existing subsidies and fiscal incentives	81	Current high energy prices	40
AT	**%**	**PL**	**%**	**PT**	**%**
Good business partners	73	Expected future increases in energy prices	54	Expected future increases in energy prices	75
Expected future increases in energy prices	62	Good business partners	43	Current high energy prices	70
Current high energy prices	58	Current high energy prices	43	Current high material price	67
RO	**%**	**SI**	**%**	**SK**	**%**
Good business partners	73	Expected future increases in energy prices	60	Current high energy prices	56
Current high energy prices	70	Current high energy prices	56	Expected future increases in energy prices	55
Current high material price	69	Good business partners	48	Good business partners	55
FI	**%**	**SE**	**%**	**UK**	**%**
Expected future increases in energy prices	47	Good business partners	44	Expected future increases in energy prices	53
Current high energy prices	45	Current high energy prices	43	Current high material price	47
Good business partners	42	Increasing market demand for green products	42	Current high energy prices	43

Q8. I will list you some drivers that could accelerate eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very important, somewhat important, not important or not at all important driver in case of your company?

Base: all companies, % EU27

Socio-demographic considerations

Looking at the proportions of respondents that described each eco-innovation driver as being *very important*, there were mostly small differences between the small and medium-sized companies. There were, however, a few exceptions; for example, managers of small companies were more likely than their counterparts in medium-sized companies to say that access to existing subsidies and fiscal incentives was a *very important* driver of eco-innovations in their company (41% vs. 36%).

Managers of companies with an annual turnover of less than €2 million were more likely to describe *current* and *future* high energy prices as being *very important drivers* of eco-innovation in their company. For example, 55% of these managers said that expected future high energy prices were a *very important* driver for the acceleration of eco-innovation uptake in their company, compared to 42% in companies with an annual turnover of more than €50 million.

Respondents in companies with an annual turnover of less than €2 million were also more likely to say that good business partners and access to existing subsidies and fiscal incentives were *very important drivers* of eco-innovation in their company; securing one's market share and expected *future* regulations and new standards were more frequently said to be *very important* to accelerated eco-innovation uptake in companies with an annual turnover of more than €50 million.

For most eco-innovation drivers, respondents who said that their company's turnover had remained unchanged in the past two years were the least likely to say that these were *very important*. For example, among these respondents, 45% said that the current high energy prices were a *very important* driver to accelerate eco-innovation uptake in their company; the corresponding figures for respondents who reported an *increase*, or rather a *decrease*, in their company's annual turnover were 52% and 54%, respectively.

As could be expected, respondents in material-intensive companies were more likely to say that the current high material prices and limited access to materials were *very important* eco-innovation drivers; they were, however, also more likely to describe the *current* and *future* high energy prices as being *very important drivers* of eco-innovation in their company. For example, 45% of respondents in companies with material costs accounting for less than 10% of the total said that expected *future* high energy costs were a *very important* driver for a faster uptake of eco-innovation in their company, this proportion increased to 56% in companies with material costs accounting for more than 50% of the total.

Companies in the various activity sectors also differed in their views about drivers of eco-innovation; however, no clear pattern emerged when these differences were analysed. Once more, some of the largest differences were seen in the proportions of respondents who said that current high material prices and limited access to materials were *very important* eco-innovation drivers. Respondents in the water supply and waste management sector were the least likely to say that access to materials and material prices were *very important* (16% and 36%, respectively); respondents in agricultural companies were most concerned about high material prices (52% vs. 45% in the remaining activity sectors), while those in the manufacture and food services sectors were more concerned than their counterparts about access to materials (32%-33% vs. 24%-29% in the remaining sectors).

Finally, respondents in companies that had introduced at least one eco-innovation in the past two years were not only more likely to describe various eco-innovation barriers as being *very serious* or *somewhat serious* ones, they were also more likely to think that each of the potential eco-innovation drivers listed in the survey were *very important*. For example, 44% of managers in eco-innovative companies said that the increasing market demand for green products was a *very important* driver for a faster uptake of eco-innovation in their company; the corresponding proportion in companies that had not introduced any eco-innovations in the past two years was 29%.

For more details, see annex tables 36b through 49b.

Flash EB Series #315

Attitudes of European entrepreneurs towards eco-innovation

Annex tables and survey details

THE GALLUP ORGANIZATION

I. Annex tables

Table 1a. Company size in terms of number of employees – *by country*

QUESTION: D1. How many employees do you have in your company?

	Total N	% 10-49	% 50-249
EU27	5222	83	17
COUNTRY			
Belgium	201	84.8	15.2
Bulgaria	204	78.3	21.7
Czech Rep.	200	79.2	20.8
Denmark	201	85.9	14.1
Germany	250	80.3	19.7
Estonia	200	82.2	17.8
Greece	201	88.8	11.2
Spain	250	88.1	11.9
France	250	76.6	23.4
Ireland	200	78.4	21.6
Italy	251	90	10
Cyprus	50	86.7	13.3
Latvia	202	79.4	20.6
Lithuania	202	76.3	23.7
Luxembourg	51	88.4	11.6
Hungary	202	83.9	16.1
Malta	50	80.8	19.2
Netherlands	200	82.6	17.4
Austria	200	83.1	16.9
Poland	200	83.5	16.5
Portugal	201	87.1	12.9
Romania	200	81.3	18.7
Slovenia	200	80.5	19.5
Slovakia	200	85	15
Finland	205	84.9	15.1
Sweden	200	83.8	16.2
United Kingdom	251	79.2	20.8

Table 1b. Company size in terms of number of employees - *by segments*

QUESTION: D1. How many employees do you have in your company?

	Total N	% 10-49	% 50-249
EU27	5222	83	17
COMPANY SIZE			
10–49 employees	4337	100	0
50+ employees	885	0	100
ACTIVITY			
Agriculture and fishing	205	78.1	21.9
Construction	1526	87.2	12.8
Water supply; sewerage; waste management and remediation activities	106	88.4	11.6
Manufacture	2843	80.2	19.8
Food services	543	87.4	12.6
TURNOVER			
Up to 2 million euro	2511	97.3	2.7
2-10 million euro	1587	77.8	22.2
10-50 million euro	449	33	67
50 million euro and over	94	33.5	66.5
ANNUAL TURNOVER OVER THE PAST 2 YRS			
Increased	1461	78.3	21.7
Remained unchanged	1518	84.2	15.8
Decreased	2110	85.6	14.4
MATERIAL COST			
Less than 10%	485	87	13
Between 10% and 29%	1326	83.1	16.9
Between 30% and 49%	1628	83.6	16.4
50% or more	1236	81.4	18.6
ECO-INNOVATION			
Yes	2331	78.6	21.4
No	2891	86.7	13.3

Table 2a. Company size in terms of turnover – *by country*

QUESTION: D2. What is the annual turnover of your company?

	Total N	% Up to 2 million euro	% 2-10 million euro	% 10-50 million euro	% 50 million euro and over	% DK/NA
EU27	5222	48.1	30.4	8.6	1.8	11.1
COUNTRY						
Belgium	201	26.9	33.5	12.5	3.4	23.7
Bulgaria	204	80.8	9.7	1.5	0	8.1
Czech Rep.	200	70.4	20.9	6.1	0.4	2.2
Denmark	201	27.5	45.1	15.1	3.8	8.5
Germany	250	43.8	39.5	10.5	3	3.2
Estonia	200	62.8	24.6	5.3	0.5	6.9
Greece	201	27.2	55.2	11.6	0.3	5.7
Spain	250	65.4	16.2	5.3	0.7	12.3
France	250	38.6	40.5	14.1	2.3	4.5
Ireland	200	42.9	32.6	12.3	2.7	9.6
Italy	251	41.5	26.1	5.9	0.5	25.9
Cyprus	50	46.8	24.5	12.8	0	15.8
Latvia	202	78.8	15.1	3.2	0.2	2.7
Lithuania	202	81.8	14.3	0.7	0	3.2
Luxembourg	51	22.1	43.2	9.1	4.1	21.5
Hungary	202	70.2	21.3	3.9	1.6	3
Malta	50	60.3	20.4	6.1	0	13.2
Netherlands	200	31.1	40.8	10.3	1.7	16.1
Austria	200	41.5	37.4	11.5	1.1	8.5
Poland	200	58.6	31.3	4.1	0.4	5.5
Portugal	201	67.8	20.9	4.5	1.2	5.6
Romania	200	45.6	17.2	8.4	12.3	16.5
Slovenia	200	59.3	27.2	8.3	0	5.1
Slovakia	200	43	30.8	9.3	1.7	15.2
Finland	205	34.8	52.8	10.8	1.2	0.4
Sweden	200	35	45.4	17.1	2.5	0
United Kingdom	251	39	28.8	11.3	1.4	19.4

Table 2b. Company size in terms of turnover - *by segments*

QUESTION: D2. What is the annual turnover of your company?

	Total N	% Up to 2 million euro	% 2-10 million euro	% 10-50 million euro	% 50 million euro and over	% DK/NA
EU27	5222	48.1	30.4	8.6	1.8	11.1
COMPANY SIZE						
10–49 employees	4337	56.3	28.5	3.4	0.7	11.1
50+ employees	885	7.8	39.8	34	7.1	11.4
ACTIVITY						
Agriculture and fishing	205	51.3	32	7.8	2.4	6.4
Construction	1526	50	32.3	6.1	1.8	9.9
Water supply; sewerage; waste management and remediation activities	106	43.1	34.2	11.5	2.2	9
Manufacture	2843	43.9	31.6	11	1.9	11.5
Food services	543	64.2	17.1	2.6	0.9	15.1
TURNOVER						
Up to 2 million euro	2511	100	0	0	0	0
2-10 million euro	1587	0	100	0	0	0
10-50 million euro	449	0	0	100	0	0
50 million euro and over	94	0	0	0	100	0
ANNUAL TURNOVER OVER THE PAST 2 YRS						
Increased	1461	38.6	37.9	11.5	2.8	9.2
Remained unchanged	1518	49.2	30.9	7	1.7	11.3
Decreased	2110	55.8	25.4	7.9	1.2	9.7
MATERIAL COST						
Less than 10%	485	55.2	26.9	7.5	2.4	7.9
Between 10% and 29%	1326	52.8	29.1	6.4	0.9	10.8
Between 30% and 49%	1628	50.1	33.7	8.2	1.1	6.9
50% or more	1236	43.8	30.7	12.5	2.5	10.5
ECO-INNOVATION						
Yes	2331	44.5	32.9	10.6	1.9	10.1
No	2891	51	28.4	7	1.7	11.9

Table 3a. Evolution of companies' annual turnover – *by country*

QUESTION: D3. Has your company's annual turnover decreased, remained unchanged or increased over the past two years?

	Total N	% Increased	% Remained unchanged	% Decreased	% DK/NA
EU27	5222	28	29.1	40.4	2.5
COUNTRY					
Belgium	201	35	31.1	28.3	5.6
Bulgaria	204	20.4	23	55.3	1.3
Czech Rep.	200	16.2	36.6	46.9	0.3
Denmark	201	27.3	17.4	55.3	0
Germany	250	39.5	37	21.8	1.7
Estonia	200	41	26.3	31.2	1.6
Greece	201	29.1	14	53.2	3.7
Spain	250	11.5	18.1	70	0.4
France	250	34.5	33.1	31.6	0.7
Ireland	200	25	16.4	55.7	2.9
Italy	251	14.6	32.3	48.5	4.5
Cyprus	50	7.4	28.6	64	0
Latvia	202	29.8	20.3	48.1	1.7
Lithuania	202	18.9	8.5	69.4	3.1
Luxembourg	51	23.5	44.4	26.8	5.3
Hungary	202	21.7	32.4	45.7	0.1
Malta	50	23.2	20.5	55.2	1.1
Netherlands	200	35.4	27.7	32.9	4
Austria	200	36.5	31.2	31.3	1
Poland	200	34.2	30.6	31.6	3.5
Portugal	201	33.5	28	37.4	1.1
Romania	200	24.4	22	51.8	1.9
Slovenia	200	21.6	22.5	55.6	0.3
Slovakia	200	17.7	27.4	51.8	3.1
Finland	205	40.7	28.3	28.8	2.3
Sweden	200	52.7	22.6	24.2	0.5
United Kingdom	251	32.8	24.1	36.2	6.9

Table 3b. Evolution of companies' annual turnover - *by segments*

QUESTION: D3. Has your company's annual turnover decreased, remained unchanged or increased over the past two years?

	Total N	% Increased	% Remained unchanged	% Decreased	% DK/NA
EU27	5222	28	29.1	40.4	2.5
COMPANY SIZE					
10–49 employees	4337	26.4	29.5	41.7	2.5
50+ employees	885	35.8	27.2	34.2	2.8
ACTIVITY					
Agriculture and fishing	205	32.1	35.3	30.4	2.2
Construction	1526	25.9	31.5	41.4	1.2
Water supply; sewerage; waste management and remediation activities	106	34.9	43.1	19.5	2.5
Manufacture	2843	28.6	26.2	41.9	3.3
Food services	543	27.9	32	37.8	2.4
TURNOVER					
Up to 2 million euro	2511	22.4	29.7	46.8	1
2-10 million euro	1587	34.9	29.6	33.8	1.7
10-50 million euro	449	37.5	23.6	37	1.9
50 million euro and over	94	43.4	26.7	27.4	2.5
ANNUAL TURNOVER OVER THE PAST 2 YRS					
Increased	1461	100	0	0	0
Remained unchanged	1518	0	100	0	0
Decreased	2110	0	0	100	0
MATERIAL COST					
Less than 10%	485	29.7	30	38.7	1.7
Between 10% and 29%	1326	30.8	28.3	39.7	1.2
Between 30% and 49%	1628	26.2	32.1	39.7	1.9
50% or more	1236	27.7	26.2	44.2	1.9
ECO-INNOVATION					
Yes	2331	33.1	27.6	36.9	2.3
No	2891	23.8	30.3	43.2	2.7

Table 4a. Companies' main activity – *by country*

QUESTION: D4. What is the main activity of your company?

	Total N	% Agriculture and fishing	% Construction	% Water supply; sewerage; waste management and remediation activities	% Manufacture	% Food services
EU27	5222	3.9	29.2	2	54.4	10.4
COUNTRY						
Belgium	201	3.8	36.7	4.2	44.3	11.1
Bulgaria	204	12.8	18.3	0	63.2	5.7
Czech Rep.	200	11.6	23.1	2.8	51	11.4
Denmark	201	5.2	39	1.6	46.2	8
Germany	250	2.3	28.7	2	60.1	6.9
Estonia	200	10.1	30	2.3	47.9	9.7
Greece	201	2.1	15.7	0.7	67.5	14
Spain	250	2.8	39.4	1.6	45.9	10.4
France	250	2.7	32.4	3.6	38.4	23
Ireland	200	3.7	24.8	2.3	42.9	26.2
Italy	251	1.2	20	1.3	73.2	4.2
Cyprus	50	4.1	33.2	1.4	36.1	25.3
Latvia	202	8.7	24.5	2.6	56.4	7.8
Lithuania	202	8.1	33.6	2.2	44.2	11.8
Luxembourg	51	1.6	62.5	0.9	22.9	12.1
Hungary	202	9.2	29.2	2.4	50.5	8.7
Malta	50	3.3	21.4	4.4	48.2	22.6
Netherlands	200	8.2	33.7	1.6	42.6	14
Austria	200	4.2	37.5	0.5	47.1	10.6
Poland	200	5.7	28	3.6	56.7	6.1
Portugal	201	1.1	34.6	1	52.3	11
Romania	200	7.1	30.3	1.9	52.7	8
Slovenia	200	2.1	35.4	2.6	50.8	9.1
Slovakia	200	13.2	30.6	2	52.7	1.5
Finland	205	4.5	34.3	1.8	51.3	8.1
Sweden	200	2	35.9	2.5	49.1	10.6
United Kingdom	251	3.5	27	0.6	56.2	12.6

Table 4b. Companies' main activity - *by segments*

QUESTION: D4. What is the main activity of your company?

	Total N	% Agriculture and fishing	% Construction	% Water supply; sewerage; waste management and remediation activities	% Manufacture	% Food services
EU27	5222	3.9	29.2	2	54.4	10.4
COMPANY SIZE						
10–49 employees	4337	3.7	30.7	2.2	52.5	10.9
50+ employees	885	5.1	22.1	1.4	63.7	7.7
ACTIVITY						
Agriculture and fishing	205	100	0	0	0	0
Construction	1526	0	100	0	0	0
Water supply; sewerage; waste management and remediation activities	106	0	0	100	0	0
Manufacture	2843	0	0	0	100	0
Food services	543	0	0	0	0	100
TURNOVER						
Up to 2 million euro	2511	4.2	30.4	1.8	49.7	13.9
2-10 million euro	1587	4.1	31	2.3	56.7	5.9
10-50 million euro	449	3.6	20.7	2.7	69.9	3.2
50 million euro and over	94	5.2	29	2.4	58	5.2
ANNUAL TURNOVER OVER THE PAST 2 YRS						
Increased	1461	4.5	27	2.5	55.6	10.3
Remained unchanged	1518	4.8	31.7	3	49.1	11.4
Decreased	2110	3	29.9	1	56.4	9.7
MATERIAL COST						
Less than 10%	485	3.8	31.5	6.3	47.1	11.3
Between 10% and 29%	1326	4.3	27.1	1.5	51	16.1
Between 30% and 49%	1628	3.9	31.3	0.9	56.5	7.5
50% or more	1236	3.7	29.1	1.2	61.8	4.3
ECO-INNOVATION						
Yes	2331	4.8	26.6	1.9	55.7	11
No	2891	3.2	31.3	2.1	53.4	9.9

Table 5a. Companies' main activity: sub-categories - *part1 – by country*

QUESTION: D4a. What is the sub category of your company?

	Total N	% Agriculture, hunting and related service activities	% Fishing, fish farming and related service activities	% Forestry and logging	% Fishing and aquaculture	% Construction of buildings	% Civil engineering	% Specialised construction activities	% Water collection, treatment and supply	% Sewerage	% Remediation activities and other waste management services	% Waste collection, treatment and disposal activities; materials recovery
EU27	5222	2.7	0.2	0.5	0.2	11.3	3.8	12.3	0.5	0.4	0.3	0.5
COUNTRY												
Belgium	201	2.2	0	0.6	0	9	3.7	18.1	0.9	0.4	0.5	0.5
Bulgaria	204	9.6	0	3.2	0	7	4.7	6.3	0	0	0	0
Czech Rep.	200	10.3	0.3	1	0	7	5.5	10.7	0	0	0	1.1
Denmark	201	1.7	1.7	0	0	10.1	3	19.1	0.2	0.6	0	0.4
Germany	250	1.1	0	0.8	0	11	4	13.2	1	0.5	0	0.5
Estonia	200	6.7	0.7	1.9	0	12.9	3.1	5.5	1.2	0.9	0.2	0
Greece	201	0.8	0.6	0	0.3	0.4	0.4	14.1	0.5	0	0.3	0
Spain	250	2.4	0.2	0	0.2	16.3	3.6	19.1	0	0.5	0.5	0.5
France	250	1.6	0.4	0.1	0.3	18.8	0.9	9.9	0	0.9	0.9	0.9
Ireland	200	2.9	0.3	0	0.3	6.4	4	10.4	0.4	0.4	0.4	0.8
Italy	251	1.2	0	0	0	8.2	1.8	9.3	0.6	0.2	0.2	0.4
Cyprus	50	4.1	0	0	0	12.9	1.6	14	0	0	0	1.4
Latvia	202	4.8	1.1	2.5	0.2	7.2	6.1	10.5	0.5	1.1	0.5	0.3
Lithuania	202	3.5	1	1.6	0.3	3.4	9.4	16.1	1.5	0	0	0.8
Luxembourg	51	1.6	0	0	0	29.2	9.3	17.2	0	0	0.2	0.5
Hungary	202	8.2	0.6	0.1	0.3	8	5.1	14.6	0.9	0.1	0.5	0.6
Malta	50	3.3	0	0	0	6.6	0	11.5	4.4	0	0	0
Netherlands	200	4.8	0.6	0.3	0.3	7.3	6.3	18.3	0	0	0	1.3
Austria	200	1.5	0	1	0	17.5	1.4	15.3	0.1	0.2	0	0.2
Poland	200	4.2	0.4	0.6	0.4	8.3	8.8	10.8	1.8	0.6	0.8	0.4
Portugal	201	0.9	0.2	0	0	14.9	1.9	15.3	0.2	0.2	0.2	0.4
Romania	200	2.5	0	2.5	1.3	3.8	13.8	10.7	0	0.7	0	0.7
Slovenia	200	1.3	0	0.3	0	6.7	1.6	18.4	0.4	1	0.4	0.4
Slovakia	200	11.1	0	1.2	0	8.2	7.9	12.5	0.1	0.4	0.4	0.7
Finland	205	2.2	0	2.3	0	17	3.5	12	0.2	0.4	0	1
Sweden	200	1.5	0	0.3	0	10.1	4.6	11.5	0.5	0.5	0.7	0.3
United Kingdom	251	2.6	0.4	0	0.5	12.1	1.3	10.2	0	0	0.2	0.2

Table 5b. Companies' main activity: sub-categories - *part1 - by segments*

QUESTION: D4a. What is the sub category of your company?

	Total N	% Agriculture, hunting and related service activities	% Fishing, fish farming and related service activities	% Forestry and logging	% Fishing and aquaculture	% Construction of buildings	% Civil engineering	% Specialised construction activities	% Water collection, treatment and supply	% Sewerage	% Remediation activities and other waste management services	% Waste collection, treatment and disposal activities; materials recovery
EU27	5222	2.7	0.2	0.5	0.2	11.3	3.8	12.3	0.5	0.4	0.3	0.5
COMPANY SIZE												
10–49 employees	4337	2.6	0.2	0.5	0.1	12.3	3.6	13	0.5	0.4	0.4	0.5
50+ employees	885	3.1	0.3	0.6	0.6	6.6	4.5	9.1	0.4	0.3	0.1	0.5
ACTIVITY												
Agriculture and fishing	205	69.2	5.9	12.1	4.9	0	0	0	0	0	0	0
Construction	1526	0	0	0	0	38.8	13	42.1	0	0	0	0
Water supply; sewerage; waste management and remediation activities	106	0	0	0	0	0	0	0	23.3	20.3	16.9	26.2
Manufacture	2843	0	0	0	0	0	0	0	0	0	0	0
Food services	543	0	0	0	0	0	0	0	0	0	0	0
TURNOVER												
Up to 2 million euro	2511	2.9	0.2	0.5	0.2	11.8	3.6	13.5	0.4	0.3	0.2	0.7
2-10 million euro	1587	2.9	0.4	0.3	0.3	12.9	5.1	11.3	0.6	0.8	0.6	0.2
10-50 million euro	449	2	0.2	1.1	0	6.6	2.1	9.7	0.2	0.1	0.2	0.6
50 million euro and over	94	2	0	2.4	0	2.2	9.3	13	0	0.3	0	1
ANNUAL TURNOVER OVER THE PAST 2 YRS												
Increased	1461	3	0.3	1	0.2	9.3	3.3	12.3	0.6	0.4	0.7	0.7
Remained unchanged	1518	3.5	0.3	0.4	0	13.2	4.3	12.5	0.6	0.8	0.2	0.7
Decreased	2110	2	0.1	0.2	0.3	12	3.9	12.4	0.2	0.2	0.2	0.4
MATERIAL COST												
Less than 10%	485	2.2	0.2	0.6	0.5	13.3	4.2	12.4	1.3	2.7	1.5	0.8
Between 10% and 29%	1326	2.9	0.2	0.7	0.2	9	3.2	13	0.5	0.3	0.1	0.4
Between 30% and 49%	1628	2.8	0.2	0.5	0.1	13	3.7	12.8	0.1	0	0.2	0.2
50% or more	1236	2.5	0.5	0.2	0.2	11.2	4.5	11.9	0.4	0.1	0	0.5
ECO-INNOVATION												
Yes	2331	3.3	0.3	0.5	0.3	9.7	3.5	11.9	0.6	0.3	0.4	0.4
No	2891	2.2	0.2	0.4	0.1	12.7	4	12.6	0.3	0.5	0.3	0.7

Table 6a. Companies' main activity: sub-categories – *part2 – by country*

QUESTION: D4a. What is the sub-category of your company?

	Total N	% Manufacture of food products or beverages	% Manufacture of tobacco products	% Manufacture of paper and paper products	% Manufacture of textiles, wearing apparel, leather and related products	% Manufacture of furniture	% Manufacture of coke and refined petroleum products	% Manufacture of chemicals and chemical products	% Manufacture of basic pharmaceutical products and pharmaceutical preparations	% Manufacture of rubber and plastic products or other non-metallic mineral products	% Manufacture of basic metals or fabricated metal products (except machinery and equipment)
EU27	5222	5.1	0.2	2	5.1	3.9	0.2	1.6	0.5	4.2	11
COUNTRY											
Belgium	201	7.6	0.4	3	4.6	2.5	0	0.9	2	1.8	6.4
Bulgaria	204	12.7	1	2.7	12	6.5	0	1.6	0.5	6.5	7.6
Czech Rep.	200	5.4	0	0	2.9	3.9	0	2.4	0	5.9	11.2
Denmark	201	2.5	0.5	1.8	1.8	2	0	0.8	0.5	5.5	9.1
Germany	250	5.3	0.4	1.6	0.8	4.1	0.4	0.8	0.4	6.1	14.4
Estonia	200	3.3	0	1.9	3.8	8.9	0	0.5	0.5	0.9	9.4
Greece	201	15	0	7.7	7.7	2.2	0	7.5	0.5	10.1	4.4
Spain	250	2	0.4	0.8	7.7	3.9	0	2.7	0.4	1.9	13.3
France	250	4.3	0	1.5	2.1	3.3	0.2	1.7	0.8	2.7	7.7
Ireland	200	3.1	0	8.2	1.9	2.8	0	0.4	3	5.5	3.5
Italy	251	4.5	0	2.2	9.6	4.7	0	1.8	0.4	5.8	15.6
Cyprus	50	0	0	2.7	0	8.1	0	0	0	0	5.4
Latvia	202	5.1	0	4.4	6.9	10.7	1.9	1.2	1.2	2.5	5
Lithuania	202	5.6	0	1.2	8.4	5.6	0	0	0.4	1.2	3.6
Luxembourg	51	4.3	0	1.7	1.7	1.7	0	0.9	0	0	4.3
Hungary	202	5.2	0.3	2.6	7.6	2.3	0	4.2	1.1	3	7
Malta	50	3.3	0	6.6	0	6.6	0	0	4.4	5.5	9.9
Netherlands	200	5.9	0	3.6	0.6	1.6	0	2.4	0	3.7	6.6
Austria	200	6.2	0	1.4	1.6	9.1	0	1.4	0	1.6	7.7
Poland	200	8.6	0	0	1.8	4.1	0.6	2.5	0	6.9	15.6
Portugal	201	7.1	0	2.1	12.8	7.1	0.5	0	0.4	3	7.6
Romania	200	12.5	1.9	0.9	10.2	2.9	0	0.4	1.7	1.4	5.5
Slovenia	200	2.1	0	2.1	3.1	5.7	0	1.1	0.5	3.8	12.2
Slovakia	200	0.9	0	1.9	4.1	3	0.6	2.2	0	2	5.9
Finland	205	5.8	0	1.4	1.7	1.8	0	0.9	0	2.2	17
Sweden	200	2.6	0	4.1	1.6	0.8	0.5	1.6	0.5	4.9	6.8
United Kingdom	251	1.4	0	4.4	6.5	1.8	0.5	0.5	0.5	3.4	8

Table 6b. Companies' main activity: sub-categories – *part2 - by segments*

QUESTION: D4a. What is the sub-category of your company?

	Total N	% Manufacture of food products or beverages	% Manufacture of tobacco products	% Manufacture of paper and paper products	% Manufacture of textiles, wearing apparel, leather and related products	% Manufacture of furniture	% Manufacture of coke and refined petroleum products	% Manufacture of chemicals and chemical products	% Manufacture of basic pharmaceutical products and pharmaceutical preparations	% Manufacture of rubber and plastic products or other non-metallic mineral products	% Manufacture of basic metals or fabricated metal products (except machinery and equipment)
EU27	5222	5.1	0.2	2	5.1	3.9	0.2	1.6	0.5	4.2	11
COMPANY SIZE											
10–49 employees	4337	4.7	0.2	1.7	5.1	4	0.2	1.4	0.5	3.9	10.7
50+ employees	885	6.7	0.2	3.2	5.5	3.6	0.3	2.9	0.6	6	12.7
ACTIVITY											
Agriculture and fishing	205	0	0	0	0	0	0	0	0	0	0
Construction	1526	0	0	0	0	0	0	0	0	0	0
Water supply; sewerage; waste management and remediation activities	106	0	0	0	0	0	0	0	0	0	0
Manufacture	2843	9.3	0.3	3.6	9.4	7.2	0.4	3	0.9	7.8	20.2
Food services	543	0	0	0	0	0	0	0	0	0	0
TURNOVER											
Up to 2 million euro	2511	4.8	0.2	1.2	5.5	4.4	0.1	1	0.4	3.6	10.1
2-10 million euro	1587	4.1	0.2	2.4	3.9	3.3	0.4	2	0.7	3.8	12.3
10-50 million euro	449	7.7	0	4.9	3.9	2.6	0	4.1	0.6	6.6	13.2
50 million euro and over	94	6.5	0.5	4.4	3.6	0	0	7.6	0.2	3.7	10.5
ANNUAL TURNOVER OVER THE PAST 2 YRS											
Increased	1461	6.3	0.2	2.1	5.1	3.1	0.1	1.5	1.1	5.2	8.3
Remained unchanged	1518	5.5	0.3	1.3	4.2	3.6	0.5	2.3	0.5	3.2	9.1
Decreased	2110	3.5	0.1	2.5	6.1	4.7	0.1	1.4	0.1	4	13.8
MATERIAL COST											
Less than 10%	485	3.1	0.1	0.6	8.5	2	0.8	1	0.7	1.9	7.3
Between 10% and 29%	1326	5.9	0.2	1.6	4.5	3.7	0.3	1.8	1	2.7	11.6
Between 30% and 49%	1628	3.6	0.2	2.8	4	5.2	0	1.4	0.4	5.8	11.5
50% or more	1236	7.6	0.3	2.3	5	3.9	0.3	2	0.3	4.9	12.9
ECO-INNOVATION											
Yes	2331	5.1	0.2	1.9	4.1	3.4	0.3	2.7	0.5	5.1	10.8
No	2891	5	0.2	2	6	4.3	0.2	0.8	0.5	3.6	11.2

Table 7a. Companies' main activity: sub-categories – *part3 – by country*

QUESTION: D4a. What is the sub-category of your company?

	Total N	% Manufacture of machinery and equipment	% Manufacture of transport equipment	% Manufacture of electrical equipment	% Manufacture of computer, electronic and optical products	% Printing and reproduction of recorded media	% Restaurants and mobile food service activities	% Event catering and other food sevices	% Beverage serving activities	% Other	% DK/NA
EU27	5222	7.5	0.8	2.6	1	1.9	6.3	2.7	0.9	9.4	0.2
COUNTRY											
Belgium	201	3.9	0.9	1.8	1.6	0	5.1	3.3	0	18.4	0
Bulgaria	204	4.8	0.5	3.3	1.6	0	3.1	0	2.1	2	0.5
Czech Rep.	200	5.3	1.5	3.9	0.5	0.5	0	1.9	3.8	15.1	0
Denmark	201	10.2	1.3	2.5	1.3	1.3	5.5	0	2.5	13.8	0.1
Germany	250	13.5	0.8	2.9	0.8	2.4	5	0.9	0.9	6.2	0
Estonia	200	2.3	0.9	2.8	1.4	0.9	6.5	2.4	0.8	19.6	0
Greece	201	1.6	1.1	1.4	0.8	3.3	1.7	7.8	3.3	6.3	0
Spain	250	3.5	0.4	1.5	0.4	3.1	7.5	2.9	0	4.3	0
France	250	3.9	1.3	2.6	1.7	1.3	13.9	9.1	0	7	0
Ireland	200	3.5	0.4	1.1	0.8	0.4	15	1.9	1.8	20.4	0
Italy	251	11.8	0.4	4.3	0.9	1.7	2.3	1.2	0.8	10.3	0
Cyprus	50	2.7	0	0	0	0	11.7	9	2	24.4	0
Latvia	202	1.9	0	0.6	0	1.9	3.4	4.3	0	14.2	0
Lithuania	202	1.2	1.2	1.2	0.4	2	6.7	1.7	0	20.6	1.2
Luxembourg	51	1.7	0	1.7	0	0	9.4	0	0	14.6	0
Hungary	202	6.7	1.4	2.3	0.8	3.4	5.4	3.3	0	4.2	0.3
Malta	50	1.1	0	0	3.3	2.2	13.6	6.8	2.3	8.8	0
Netherlands	200	8.7	0.6	0.4	1	2.1	10.6	1.8	1.6	6.9	2.7
Austria	200	4.8	0.5	3.3	1.9	3.5	9.3	0	0.6	8.5	1.2
Poland	200	7.4	2.2	1.9	1.2	2.2	5.3	0.8	0	1.2	0.6
Portugal	201	2	0.5	2.2	0.8	0	4.5	2.8	3.7	8.8	0
Romania	200	0.5	0	1.5	0	0	2.4	3.7	0.6	17.6	0.4
Slovenia	200	5.5	1.4	1.5	0.9	0.9	6.3	1.4	0	20.5	0.5
Slovakia	200	15.6	1.1	3.3	0.6	1.1	0.3	0.6	0.5	13.7	0
Finland	205	6.6	0.8	3.1	0.9	0.8	8.1	0	0	10.3	0
Sweden	200	11.8	0.8	2.8	0.5	0.5	5.8	3.3	0	21	0.3
United Kingdom	251	7.1	0.5	2.4	1.1	2.8	7.6	1.4	2.3	20.4	0

Table 7b. Companies' main activity: sub-categories – *part3 - by segments*

QUESTION: D4a. What is the sub-category of your company?

	Total N	% Manufacture of machinery and equipment	% Manufacture of transport equipment	% Manufacture of electrical equipment	% Manufacture of computer, electronic and optical products	% Printing and reproduction of recorded media	% Restaurants and mobile food service activities	% Event catering and other food sevices	% Beverage serving activities	% Other	% DK/NA
EU27	5222	7.5	0.8	2.6	1	1.9	6.3	2.7	0.9	9.4	0.2
COMPANY SIZE											
10–49 employees	4337	7.1	0.7	2.6	0.9	1.9	6.5	2.9	0.9	9.8	0.2
50+ employees	885	9.5	1.5	2.9	1.2	1.9	5.3	1.7	0.6	7.5	0.2
ACTIVITY											
Agriculture and fishing	205	0	0	0	0	0	0	0	0	7.4	0.5
Construction	1526	0	0	0	0	0	0	0	0	6	0.1
Water supply; sewerage; waste management and remediation activities	106	0	0	0	0	0	0	0	0	12.3	1
Manufacture	2843	13.8	1.5	4.8	1.8	3.4	0	0	0	12.2	0.2
Food services	543	0	0	0	0	0	60.7	26	8.5	4.8	0.1
TURNOVER											
Up to 2 million euro	2511	5.9	0.7	2.3	0.7	2.1	9	3.3	1	9.1	0.2
2-10 million euro	1587	10.6	1.1	2.5	1.4	1.3	3.7	1.6	0.4	8.8	0.1
10-50 million euro	449	12.4	0.3	4	0.2	2.3	0.1	2.5	0.1	11.5	0.2
50 million euro and over	94	3	3.2	5.7	3.4	0	0.4	0	3.6	12.6	0.9
ANNUAL TURNOVER OVER THE PAST 2 YRS											
Increased	1461	7.8	0.7	3.5	1.5	2.4	6.8	2.4	0.8	9.3	0.1
Remained unchanged	1518	7	0.4	2.6	0.9	1.4	6.7	3.4	0.9	9.6	0.1
Decreased	2110	7.8	1.2	2.1	0.7	1.9	5.8	2.6	0.8	8.8	0.4
MATERIAL COST											
Less than 10%	485	5.3	1	2	2.1	2.8	7.3	3.1	0.8	9.2	0.5
Between 10% and 29%	1326	7.1	0.2	3.4	0.9	1.5	10	4.7	0.5	7.4	0.2
Between 30% and 49%	1628	10.4	1.1	1.7	0.8	1.5	3.9	2	1.4	8.5	0.2
50% or more	1236	6.8	1.4	3.2	0.9	2.3	1.7	1.3	0.7	10.3	0.1
ECO-INNOVATION											
Yes	2331	8.4	0.7	2.5	1.1	1.9	7.7	2	0.9	9.5	0.1
No	2891	6.8	0.9	2.7	0.9	1.9	5.2	3.3	0.9	9.4	0.3

Table 8a. Cost of materials as a percentage of a companies' total costs – *by country*

QUESTION: Q1. What percentage of your company's total cost - i.e. gross production value - is material cost? Material cost is the cost of all materials used to manufacture a product or perform a service.

	Total N	% Less than 10%	% Between 10% and 29%	% Between 30% and 49%	% 50% or more	% Not applicable	% DK/NA
EU27	5222	9.3	25.4	31.2	23.7	0.3	10.2
COUNTRY							
Belgium	201	9.8	24.3	22.6	21.2	1	21
Bulgaria	204	11.2	16.8	20.8	42.3	0.5	8.3
Czech Rep.	200	5.5	23.7	38.2	26.1	0	6.4
Denmark	201	9.6	31.7	36	20.8	0	1.8
Germany	250	6.2	35.4	37.7	16.4	0	4.4
Estonia	200	9.2	22.5	26.7	27.7	0	14
Greece	201	12.7	24.5	23.8	26.8	0	12.3
Spain	250	11.8	28.8	25.1	19.6	0.4	14.3
France	250	21.4	31.8	25.5	12.1	0	9.1
Ireland	200	12.1	22.7	30.6	23.2	0	11.4
Italy	251	7.6	25.3	33.9	20.5	0.4	12.2
Cyprus	50	5.8	23.5	25.5	26.6	0	18.6
Latvia	202	4.6	13.2	32.5	41.5	0.6	7.7
Lithuania	202	2.9	17.6	34.9	35.8	1.2	7.5
Luxembourg	51	9	44.1	36.2	7.2	0	3.6
Hungary	202	4.8	15	31.9	37.8	1.5	9
Malta	50	4.4	19.9	33.3	34.1	0	8.3
Netherlands	200	7	28.5	34.3	18.2	1.1	10.8
Austria	200	3.7	21.1	50.4	17.9	0	6.8
Poland	200	6.4	14.5	26.2	47.4	0.6	4.9
Portugal	201	14.4	20.1	26.3	27.8	0.7	10.7
Romania	200	4.8	12.8	26.9	43.8	0.5	11.2
Slovenia	200	7.9	16.9	35.3	36.1	0	3.8
Slovakia	200	6	20	33.5	30.3	0.6	9.6
Finland	205	12.4	28.8	36	20	0.5	2.4
Sweden	200	4.9	26.4	37.1	24.6	0	7.2
United Kingdom	251	4.7	21.5	31.6	21.1	0	21.1

Table 8b. Cost of materials as a percentage of a companies' total costs - *by segments*

QUESTION: Q1. What percentage of your company's total cost - i.e. gross production value - is material cost? Material cost is the cost of all materials used to manufacture a product or perform a service.

	Total N	% Less than 10%	% Between 10% and 29%	% Between 30% and 49%	% 50% or more	% Not applicable	% DK/NA
EU27	5222	9.3	25.4	31.2	23.7	0.3	10.2
COMPANY SIZE							
10–49 employees	4337	9.7	25.4	31.4	23.2	0.3	9.9
50+ employees	885	7.1	25.4	30.1	26	0.2	11.2
ACTIVITY							
Agriculture and fishing	205	9.1	28	30.6	22.5	0	9.9
Construction	1526	10	23.5	33.4	23.6	0.2	9.3
Water supply; sewerage; waste management and remediation activities	106	28.9	18.5	13.2	13.5	0	26
Manufacture	2843	8	23.8	32.4	26.9	0.5	8.4
Food services	543	10.1	39.3	22.4	9.7	0	18.5
TURNOVER							
Up to 2 million euro	2511	10.7	27.9	32.5	21.6	0.5	6.9
2-10 million euro	1587	8.2	24.3	34.6	23.9	0	9
10-50 million euro	449	8.1	18.9	29.6	34.5	0.1	8.7
50 million euro and over	94	12.5	12.9	19.5	33	0	22.2
ANNUAL TURNOVER OVER THE PAST 2 YRS							
Increased	1461	9.9	27.9	29.2	23.5	0.4	9.1
Remained unchanged	1518	9.6	24.8	34.4	21.3	0.1	9.8
Decreased	2110	8.9	24.9	30.6	25.9	0.3	9.4
MATERIAL COST							
Less than 10%	485	100	0	0	0	0	0
Between 10% and 29%	1326	0	100	0	0	0	0
Between 30% and 49%	1628	0	0	100	0	0	0
50% or more	1236	0	0	0	100	0	0
ECO-INNOVATION							
Yes	2331	7.8	26.5	31.3	25.5	0	8.8
No	2891	10.5	24.5	31	22.2	0.6	11.2

Table 9a. How companies' material costs have evolved over 5 years – *by country*

QUESTION: Q2. Have material costs for your company increased or decreased in the past 5 years?

	Total N	% Increased dramatically	% Increased moderately	% Remained unchanged	% Decreased	% Not applicable	% DK/NA
EU27	5222	25.7	48.9	14.9	7.9	0.3	2.3
COUNTRY							
Belgium	201	32.1	47.1	12.8	4.5	1	2.5
Bulgaria	204	11.4	41.5	22.6	21.1	0.5	2.9
Czech Rep.	200	5.8	42.7	34.4	15.5	0	1.8
Denmark	201	10.9	42	21.4	22.7	0	2.9
Germany	250	28.6	55.5	10.8	3.8	0	1.3
Estonia	200	27.9	30.5	22	11.7	0	7.9
Greece	201	18.6	45.4	17.1	16.6	0	2.3
Spain	250	27.3	38.2	17.5	14.4	0.4	2.1
France	250	28.6	47.2	17	5.8	0	1.4
Ireland	200	29.8	43.6	9.6	15.7	0	1.4
Italy	251	19.3	54.2	15.7	8.1	0.4	2.2
Cyprus	50	28.4	37.1	17.1	15.9	0	1.6
Latvia	202	27	37.9	16.6	12.9	0.6	5.1
Lithuania	202	30.2	28.6	14.8	22	1.2	3.2
Luxembourg	51	18.4	62.2	10.1	6.7	0	2.6
Hungary	202	33.4	38.6	11.7	9.3	1.5	5.5
Malta	50	49.9	36.9	7.7	2.3	0	3.3
Netherlands	200	21.7	53.6	12.9	7.6	1.1	3.2
Austria	200	27.4	52.4	15.3	2.7	0	2.3
Poland	200	24.1	60.9	11.4	1.7	0.6	1.4
Portugal	201	26	47	14.9	10	0.7	1.4
Romania	200	16.6	49.5	16.6	14.9	0.5	1.9
Slovenia	200	23.3	42.7	15.7	14.8	0	3.4
Slovakia	200	19.5	35.1	24.7	14.7	0.6	5.4
Finland	205	9.4	58.4	22.8	7.8	0.5	1.2
Sweden	200	13.3	50	27.7	5.4	0	3.5
United Kingdom	251	45.7	42.4	4.2	3	0	4.7

Table 9b. How companies' material costs have evolved over 5 years - *by segments*

QUESTION: Q2. Have material costs for your company increased or decreased in the past 5 years?

	Total N	% Increased dramatically	% Increased moderately	% Remained unchanged	% Decreased	% Not applicable	% DK/NA
EU27	5222	25.7	48.9	14.9	7.9	0.3	2.3
COMPANY SIZE							
10–49 employees	4337	26	48.2	15.5	7.7	0.3	2.2
50+ employees	885	23.8	52	12	9.2	0.2	2.7
ACTIVITY							
Agriculture and fishing	205	29.2	50.8	11.1	6.9	0	2
Construction	1526	21.1	52.5	16.6	7.4	0.2	2.2
Water supply; sewerage; waste management and remediation activities	106	20.1	59.8	12.7	5	0	2.3
Manufacture	2843	28.5	47.1	13.5	8.3	0.5	2.1
Food services	543	23.5	44.9	19.3	8.6	0	3.7
TURNOVER							
Up to 2 million euro	2511	27	46.7	15.6	8.2	0.5	2
2-10 million euro	1587	24.7	51.6	15.6	6.8	0	1.2
10-50 million euro	449	24.5	54.5	10	9.1	0.1	1.8
50 million euro and over	94	24.9	52.7	8.2	9.6	0	4.6
ANNUAL TURNOVER OVER THE PAST 2 YRS							
Increased	1461	28.3	54.4	10.4	4.6	0.4	1.8
Remained unchanged	1518	23.2	51.6	20.7	2.8	0.1	1.7
Decreased	2110	26.3	43	14.2	14.2	0.3	2.1
MATERIAL COST							
Less than 10%	485	22.7	42.2	21.7	11.3	0	2
Between 10% and 29%	1326	21.6	54.4	15.1	8	0	0.9
Between 30% and 49%	1628	25.7	50.8	15.1	7.2	0	1.2
50% or more	1236	33.3	44.7	13	7.7	0	1.3
ECO-INNOVATION							
Yes	2331	27.5	51	12.4	7	0	2
No	2891	24.2	47.1	16.9	8.7	0.6	2.5

Table 10a. Expectations about how companies' material costs will evolve (5 – 10 years) – *by country*

QUESTION: Q3. Do you expect price increases for materials in the coming 5 to 10 years?

	Total N	% Yes, material costs will increase	% No, material costs will remain approximately the same	% No, material costs will decrease	% Not applicable	% DK/NA
EU27	5222	87.4	7.9	0.9	0	3.8
COUNTRY						
Belgium	201	83.5	10.5	2.4	0	3.7
Bulgaria	204	88.2	5.4	1.3	0	5.2
Czech Rep.	200	73.3	23.4	1.3	0	2
Denmark	201	92.7	4.2	2	0	1.1
Germany	250	97.4	2.2	0	0	0.4
Estonia	200	84	6.6	1.9	0	7.5
Greece	201	83.6	6.9	1.7	0	7.9
Spain	250	82.2	13.5	1.6	0	2.7
France	250	92.1	3.9	1.7	0	2.3
Ireland	200	88.7	5.9	1.8	0	3.6
Italy	251	78.9	14.6	0	0	6.5
Cyprus	50	83.3	5.4	0	0	11.2
Latvia	202	80.1	9.1	1.2	0	9.5
Lithuania	202	85.6	4.8	0	0	9.6
Luxembourg	51	96.6	3.4	0	0	0
Hungary	202	92.3	2.5	0.8	0	4.4
Malta	50	92.3	2.2	0	0	5.5
Netherlands	200	92.2	3.4	1	0	3.4
Austria	200	94	4.2	1.3	0	0.4
Poland	200	84.9	8.9	0.8	0	5.4
Portugal	201	79.7	15	2.3	0	3.1
Romania	200	82.4	8.7	3.4	0	5.5
Slovenia	200	86.4	9.3	1.5	0	2.8
Slovakia	200	78.9	9.5	2.4	0	9.2
Finland	205	92.1	5.5	0.8	0	1.6
Sweden	200	90.9	5.3	1.3	0	2.5
United Kingdom	251	94.5	1.2	0	0	4.3

Table 10b. Expectations about how companies' material costs will evolve (5 – 10 years) - *by segments*

QUESTION: Q3. Do you expect price increases for materials in the coming 5 to 10 years?

	Total N	% Yes, material costs will increase	% No, material costs will remain approximately the same	% No, material costs will decrease	% Not applicable	% DK/NA
EU27	5222	87.4	7.9	0.9	0	3.8
COMPANY SIZE						
10–49 employees	4337	87.3	8.2	0.9	0	3.6
50+ employees	885	88	6.5	1	0	4.6
ACTIVITY						
Agriculture and fishing	205	90.4	6.3	0.8	0	2.5
Construction	1526	86.6	9.3	1.4	0	2.7
Water supply; sewerage; waste management and remediation activities	106	93.3	2.9	0.5	0	3.3
Manufacture	2843	86.5	7.9	0.8	0	4.7
Food services	543	92	5.4	0.3	0	2.2
TURNOVER						
Up to 2 million euro	2511	88	7.9	0.8	0	3.3
2-10 million euro	1587	89.9	5.8	0.8	0	3.5
10-50 million euro	449	90.2	6.9	1.3	0	1.6
50 million euro and over	94	88.3	1.2	3.3	0	7.2
ANNUAL TURNOVER OVER THE PAST 2 YRS						
Increased	1461	90.3	6.5	0.7	0	2.5
Remained unchanged	1518	88.1	7.9	0.6	0	3.4
Decreased	2110	85.9	8.8	1.3	0	4
MATERIAL COST						
Less than 10%	485	85.7	9.8	2	0	2.5
Between 10% and 29%	1326	89.4	7	0.4	0	3.2
Between 30% and 49%	1628	89.1	8.3	0.8	0	1.9
50% or more	1236	86.6	8.5	1	0	3.9
ECO-INNOVATION						
Yes	2331	89.7	6.7	1	0	2.6
No	2891	85.6	8.8	0.9	0	4.7

Table 11a. Origin of most of the materials that companies use – *by country*

QUESTION: Q4. From what regions do most of the materials you use come/originate from?

% of "Mentioned" shown

	Total N	Own country	Other EU countries	Other European countries (non-EU)	Asia	Africa	North America	South America	Australia and Oceania	DK/NA
EU27	5222	77.8	43.3	8.5	10	1.9	3.8	3.1	1.1	1.2
COUNTRY										
Belgium	201	65.2	43.7	11.2	9.2	2.8	4.4	3.4	0.4	0
Bulgaria	204	66.9	51.1	22.4	18.7	1.5	0.9	0.5	1.6	0.4
Czech Rep.	200	81.4	45	5.8	2.9	0.5	1.9	3.3	0.5	0.3
Denmark	201	50.2	61.3	18	16.9	3.2	6.9	5	0.8	2.3
Germany	250	85.6	52.5	13.8	19.3	2	5.6	6.2	0.9	1.3
Estonia	200	62	68.8	26.6	11.3	0.5	1.4	0	0	0.5
Greece	201	54	67.9	11	17.1	2.2	2.8	1.7	0.8	2.7
Spain	250	89.6	30	5	9.8	3.1	3.2	3.8	1.1	0
France	250	77.5	43.1	2	5.9	1.8	3.6	2.2	0.2	0.7
Ireland	200	54.7	60.8	12.8	13.5	2	11.7	5.8	2.3	1.4
Italy	251	76.7	25.5	4.6	3.9	0.4	1.7	1.6	0	1
Cyprus	50	52.9	68	16.1	15.3	2.7	8.6	6.3	0	0
Latvia	202	62.1	58.3	14.5	10.2	1.9	0.7	0	0.6	0
Lithuania	202	43.1	53.4	18.5	9.6	2	1.6	1.6	1.5	3.5
Luxembourg	51	55.3	81.1	17.2	5.2	2.6	0.2	0	0	0
Hungary	202	72.3	43.5	4.2	4.1	0.5	0	0	0	0.5
Malta	50	25.9	81.8	8.8	3.3	0	2.2	0	0	0
Netherlands	200	63.1	47.5	10.4	13	2.4	7.8	4.1	1.6	1.9
Austria	200	71.9	54.7	8.6	9.9	3.9	3.1	3.8	1.6	1.7
Poland	200	85.7	41.1	7.4	8.2	2	3.3	0.8	0.8	1.2
Portugal	201	77.1	48.9	6.4	8.2	3.5	4	5.6	0.5	0
Romania	200	78.6	46.7	9.2	6.8	0.5	1.5	0.5	0	1.2
Slovenia	200	57.4	73.9	11.6	13.1	1.2	5.3	3.6	1.4	1.3
Slovakia	200	67.7	63.3	12.7	8	1.4	3.5	1.7	1.6	2.8
Finland	205	77.2	48.8	10.9	9.9	0.5	2.2	1.3	0.5	1.2
Sweden	200	71.3	49	10.2	13.9	2.8	4.9	3.5	2	4.8
United Kingdom	251	78.5	49.9	14.6	16.3	2.8	7.7	5	5.6	3.6

Table 11b. Origin of most of the materials that companies use - *by segments*

QUESTION: Q4. From what regions do most of the materials you use come/originate from?

% of "Mentioned" shown

	Total N	Own country	Other EU countries	Other European countries (non-EU)	Asia	Africa	North America	South America	Australia and Oceania	DK/NA
EU27	5222	77.8	43.3	8.5	10	1.9	3.8	3.1	1.1	1.2
COMPANY SIZE										
10–49 employees	4337	78.5	41.5	7.9	9.5	1.7	3.7	2.9	0.9	1.2
50+ employees	885	74.7	51.9	11.4	12.8	2.5	4.6	3.9	1.8	1.2
ACTIVITY										
Agriculture and fishing	205	86.6	42.2	3.9	3.1	1.9	6.4	3.3	1.1	1.2
Construction	1526	84	35.4	4.3	5.9	1	2.2	1.9	0.2	1.4
Water supply; sewerage; waste management and remediation activities	106	91.6	29.2	4	2.1	0.9	1.4	0.7	0.4	0.2
Manufacture	2843	71	48.9	11.7	13.8	2	4.8	3.1	1.3	1.2
Food services	543	90	39.6	5.4	6.3	3.5	2.9	6.7	2.3	1.1
TURNOVER										
Up to 2 million euro	2511	82.1	40	7.2	9.1	1.8	3.8	3.2	0.8	0.7
2-10 million euro	1587	74.2	46.1	9.2	10.5	1.5	3.9	2.4	1	1.1
10-50 million euro	449	70.5	60.2	12.3	15.4	2.7	5.2	3.7	1.5	1
50 million euro and over	94	74.9	56	12.8	22.4	2.5	5.2	7.5	2.5	2.7
ANNUAL TURNOVER OVER THE PAST 2 YRS										
Increased	1461	75.7	48.3	9.1	12.9	2.2	5.1	3.8	1	1.7
Remained unchanged	1518	80.8	41.3	6.4	8.8	1.8	3.1	2.9	1.6	0.8
Decreased	2110	77	42.3	9.6	9.1	1.6	3.3	2.9	0.7	0.9
MATERIAL COST										
Less than 10%	485	74.4	42.2	3.9	8.1	1	1.9	1.2	0.5	2
Between 10% and 29%	1326	81.5	41.8	7.4	10.5	1.5	5	3.5	1.1	1.1
Between 30% and 49%	1628	77	45.4	9.1	10.3	2.9	3.7	3.9	1.2	0.7
50% or more	1236	75.2	47.1	11.5	10.8	1.7	4.1	2.5	1.2	0.2
ECO-INNOVATION										
Yes	2331	78	49.2	10	12	2.2	4.4	4.1	1.4	0.6
No	2891	77.7	38.5	7.2	8.4	1.6	3.4	2.3	0.8	1.7

Table 12a. Changes implemented to reduce material costs in past 5 years: Changing business model – *by country*

QUESTION: Q5_a. Have you implemented any changes to reduce material costs in the past 5 years? - Changing business model

	Total N	% Mentioned	% Not mentioned	% Not applicable	% DK/NA
EU27	5222	26.6	62.6	8.7	2.1
COUNTRY					
Belgium	201	25.8	64.3	7.9	2
Bulgaria	204	48.1	41.4	9.7	0.8
Czech Rep.	200	21.8	75.2	1.6	1.4
Denmark	201	24.2	66.8	7.9	1.1
Germany	250	22	65	11.2	1.7
Estonia	200	33.6	30.2	32.9	3.3
Greece	201	48.1	49.2	0.9	1.7
Spain	250	18	78	4	0
France	250	23.2	75.9	0.9	0
Ireland	200	55.6	39.6	3.5	1.4
Italy	251	22.3	66.7	9.7	1.3
Cyprus	50	44.2	43.7	12.1	0
Latvia	202	27.7	63.7	8	0.6
Lithuania	202	31.6	39.8	25.4	3.1
Luxembourg	51	36.4	50.7	12.9	0
Hungary	202	15.6	60.5	21.1	2.8
Malta	50	42.7	42	13.2	2.2
Netherlands	200	26.8	37.6	29.8	5.8
Austria	200	20.4	63.3	12.5	3.8
Poland	200	41.9	52.1	3.2	2.7
Portugal	201	33.9	52.7	11.7	1.7
Romania	200	34.8	56.5	5	3.7
Slovenia	200	40.6	55.2	4.1	0
Slovakia	200	31.6	46.5	15.4	6.5
Finland	205	21.7	75.6	2.7	0
Sweden	200	14.8	69.7	10.2	5.4
United Kingdom	251	33.3	47.7	12.7	6.3

Table 12b. Changes implemented to reduce material costs in past 5 years: Changing business model - *by segments*

QUESTION: Q5_a. Have you implemented any changes to reduce material costs in the past 5 years? - Changing business model

	Total N	% Mentioned	% Not mentioned	% Not applicable	% DK/NA
EU27	5222	26.6	62.6	8.7	2.1
COMPANY SIZE					
10–49 employees	4337	25.6	63.5	9	1.9
50+ employees	885	31.5	58.4	7	3.2
ACTIVITY					
Agriculture and fishing	205	34.3	55.6	7.9	2.2
Construction	1526	21.9	65.9	9.6	2.5
Water supply; sewerage; waste management and remediation activities	106	31.2	60.9	7.2	0.7
Manufacture	2843	27.9	61.5	8.7	1.9
Food services	543	29.1	62.1	6.4	2.3
TURNOVER					
Up to 2 million euro	2511	23.6	66.3	8.5	1.5
2-10 million euro	1587	28.7	62.1	7.6	1.5
10-50 million euro	449	37.9	54	6.7	1.4
50 million euro and over	94	20.9	67.1	7.8	4.2
ANNUAL TURNOVER OVER THE PAST 2 YRS					
Increased	1461	29.5	58.8	9.6	2.1
Remained unchanged	1518	23.2	66.7	8.4	1.7
Decreased	2110	27.3	63.2	8	1.5
MATERIAL COST					
Less than 10%	485	17	73.2	9	0.7
Between 10% and 29%	1326	25.6	65.2	6.5	2.7
Between 30% and 49%	1628	25.3	65.4	8.4	0.9
50% or more	1236	31.8	57.8	9.1	1.2
ECO-INNOVATION					
Yes	2331	38	52.6	8	1.4
No	2891	17.4	70.7	9.3	2.6

Table 13a. Changes implemented to reduce material costs in past 5 years: Improving the material flow in the supply chain – *by country*

QUESTION: Q5_b. Have you implemented any changes to reduce material costs in the past 5 years? - Improving the material flow in the supply chain

	Total N	% Mentioned	% Not mentioned	% Not applicable	% DK/NA
EU27	5222	46.1	43.5	8.2	2.2
COUNTRY					
Belgium	201	40.1	44.5	11.9	3.5
Bulgaria	204	65.3	28	4.6	2.1
Czech Rep.	200	39.5	59.8	0.7	0
Denmark	201	45.8	43.7	8.5	1.9
Germany	250	47.6	40.3	10.4	1.7
Estonia	200	45.8	20.8	26	7.5
Greece	201	61.3	31.2	3.2	4.2
Spain	250	51.8	43.3	5	0
France	250	26.5	69.8	2.3	1.4
Ireland	200	69.6	24.8	3.5	2
Italy	251	34.3	53.1	11.6	1
Cyprus	50	66.2	30.7	1.6	1.6
Latvia	202	51.5	42	5.8	0.8
Lithuania	202	42.1	29	18.4	10.5
Luxembourg	51	41.7	44.4	13.8	0
Hungary	202	46.2	35.1	14.9	3.7
Malta	50	63.7	30.3	6.1	0
Netherlands	200	35.3	34.1	23.1	7.5
Austria	200	47	39.7	11.2	2.2
Poland	200	66.1	30.3	2.1	1.6
Portugal	201	47.6	37.6	14	0.8
Romania	200	70.9	21.6	5.2	2.3
Slovenia	200	67.8	28.3	3.1	0.8
Slovakia	200	48.5	30.9	15.7	5
Finland	205	64.2	32.4	2	1.3
Sweden	200	39.2	43.9	11.1	5.8
United Kingdom	251	57.6	27.9	8	6.5

Table 13b. Changes implemented to reduce material costs in past 5 years: Improving the material flow in the supply chain - *by segments*

QUESTION: Q5_b. Have you implemented any changes to reduce material costs in the past 5 years? - Improving the material flow in the supply chain

	Total N	% Mentioned	% Not mentioned	% Not applicable	% DK/NA
EU27	5222	46.1	43.5	8.2	2.2
COMPANY SIZE					
10–49 employees	4337	44.1	44.8	8.9	2.2
50+ employees	885	56.1	36.9	4.7	2.3
ACTIVITY					
Agriculture and fishing	205	50.2	38.1	9.1	2.6
Construction	1526	45.5	44.7	8	1.8
Water supply; sewerage; waste management and remediation activities	106	42.9	47.7	5.6	3.8
Manufacture	2843	46.6	42.9	8.4	2
Food services	543	44	44.4	7.3	4.3
TURNOVER					
Up to 2 million euro	2511	43.8	46.6	8	1.6
2-10 million euro	1587	48.7	42.3	7.3	1.6
10-50 million euro	449	53.7	38.9	5.3	2
50 million euro and over	94	66.9	28.2	4	0.9
ANNUAL TURNOVER OVER THE PAST 2 YRS					
Increased	1461	52.5	38	7.5	2
Remained unchanged	1518	40.6	48.4	8.9	2.1
Decreased	2110	46.3	43.9	8	1.7
MATERIAL COST					
Less than 10%	485	30.1	57.8	11.3	0.8
Between 10% and 29%	1326	42.5	47.6	7.5	2.3
Between 30% and 49%	1628	47.7	44.5	6.6	1.2
50% or more	1236	54.5	36.6	6.7	2.2
ECO-INNOVATION					
Yes	2331	59.7	31.9	6.5	1.8
No	2891	35.1	52.8	9.5	2.6

Table 14a. Changes implemented to reduce material costs in past 5 years: Substituting expensive materials for a cheaper ones – *by country*

QUESTION: Q5_c. Have you implemented any changes to reduce material costs in the past 5 years? - Substituting expensive materials for a cheaper ones

	Total N	% Mentioned	% Not mentioned	% Not applicable	% DK/NA
EU27	5222	37.8	52.5	8.2	1.5
COUNTRY					
Belgium	201	42.6	46.3	10.7	0.4
Bulgaria	204	43.8	47.6	5.8	2.8
Czech Rep.	200	32.3	62.4	3.9	1.4
Denmark	201	36	58.5	5	0.5
Germany	250	36	54.6	8.6	0.9
Estonia	200	41.2	28.3	26.2	4.2
Greece	201	49.7	48.1	1.9	0.3
Spain	250	38.8	57.3	3.5	0.4
France	250	30.8	67.8	0.5	0.9
Ireland	200	54.8	41.9	2.9	0.4
Italy	251	33.5	52.7	12.8	1
Cyprus	50	38.2	57.1	4.7	0
Latvia	202	49	41	9.2	0.7
Lithuania	202	43.5	35.6	18.6	2.3
Luxembourg	51	46.2	43.5	10.3	0
Hungary	202	38	44.2	14.6	3.2
Malta	50	30	61.2	6.6	2.2
Netherlands	200	29	38.7	26.3	6.1
Austria	200	32.3	50.4	13.7	3.6
Poland	200	47.3	46.3	5.5	0.9
Portugal	201	42.6	45	11.7	0.8
Romania	200	44.7	44.5	9.3	1.4
Slovenia	200	49.9	45	4.8	0.3
Slovakia	200	32.1	46.1	15.9	5.9
Finland	205	36.4	58.8	4.3	0.5
Sweden	200	34.2	51.5	10.9	3.4
United Kingdom	251	46.4	44.3	6.5	2.9

Table 14b. Changes implemented to reduce material costs in past 5 years: Substituting expensive materials for a cheaper ones - *by segments*

QUESTION: Q5_c. Have you implemented any changes to reduce material costs in the past 5 years? - Substituting expensive materials for a cheaper ones

	Total N	% Mentioned	% Not mentioned	% Not applicable	% DK/NA
EU27	5222	37.8	52.5	8.2	1.5
COMPANY SIZE					
10–49 employees	4337	37.4	53	8.3	1.2
50+ employees	885	39.9	49.8	7.7	2.7
ACTIVITY					
Agriculture and fishing	205	44.6	44.4	9.9	1
Construction	1526	37.7	52.7	8.2	1.3
Water supply; sewerage; waste management and remediation activities	106	28	65.3	6	0.7
Manufacture	2843	37.9	51.8	8.7	1.6
Food services	543	37.4	55.8	5.1	1.7
TURNOVER					
Up to 2 million euro	2511	37.5	53.6	7.9	1
2-10 million euro	1587	37.4	54.1	7.9	0.6
10-50 million euro	449	44	48.3	5.7	2
50 million euro and over	94	48.5	43	6	2.5
ANNUAL TURNOVER OVER THE PAST 2 YRS					
Increased	1461	38.9	51.7	7.7	1.7
Remained unchanged	1518	35.7	55.6	7.6	1
Decreased	2110	38.7	51.6	8.7	1.1
MATERIAL COST					
Less than 10%	485	33.3	57.2	8.7	0.8
Between 10% and 29%	1326	40.4	51.9	6.3	1.4
Between 30% and 49%	1628	36.6	54	8	1.4
50% or more	1236	40.1	50.1	9.1	0.7
ECO-INNOVATION					
Yes	2331	43.7	47.6	7.5	1.2
No	2891	33.2	56.4	8.7	1.7

Table 15a. Changes implemented to reduce material costs in past 5 years: Purchasing more efficient technologies – *by country*

QUESTION: Q5_d. Have you implemented any changes to reduce material costs in the past 5 years? - Purchasing more efficient technologies

	Total N	% Mentioned	% Not mentioned	% Not applicable	% DK/NA
EU27	5222	56.2	36.4	6.3	1.2
COUNTRY					
Belgium	201	57.6	34.3	7.2	0.9
Bulgaria	204	55.9	39.3	4.8	0
Czech Rep.	200	53.6	44.8	1.6	0
Denmark	201	60.2	34.3	4.5	1.1
Germany	250	58.1	30.8	10.2	0.9
Estonia	200	65.6	19	11.4	4
Greece	201	70	27.7	2.3	0
Spain	250	55.2	41	3.5	0.4
France	250	49.3	50.1	0.6	0
Ireland	200	77.3	19.2	1.8	1.7
Italy	251	49.9	41.9	6.8	1.4
Cyprus	50	76.6	19.9	3.5	0
Latvia	202	60.5	34.5	5.1	0
Lithuania	202	57.4	23.6	15.9	3.1
Luxembourg	51	57.9	36.1	6	0
Hungary	202	47.2	33.7	15.9	3.1
Malta	50	54.7	36	9.3	0
Netherlands	200	44.2	29.8	18.9	7.2
Austria	200	43.2	43.6	10.4	2.7
Poland	200	59.2	35.7	5	0
Portugal	201	62.2	30	7.1	0.8
Romania	200	73.5	20.8	4.1	1.6
Slovenia	200	68.6	27.8	2.7	0.9
Slovakia	200	54.2	29.8	10.1	5.9
Finland	205	51	47	2	0
Sweden	200	46.1	39.1	10.6	4.2
United Kingdom	251	72.8	21.6	4.5	1.1

Table 15b. Changes implemented to reduce material costs in past 5 years: Purchasing more efficient technologies - *by segments*

QUESTION: Q5_d. Have you implemented any changes to reduce material costs in the past 5 years? - Purchasing more efficient technologies

	Total N	% Mentioned	% Not mentioned	% Not applicable	% DK/NA
EU27	5222	56.2	36.4	6.3	1.2
COMPANY SIZE					
10–49 employees	4337	53.5	38.6	6.8	1.1
50+ employees	885	69.2	25.7	3.6	1.5
ACTIVITY					
Agriculture and fishing	205	68.9	24.2	5.9	1
Construction	1526	56.2	35.7	6.9	1.3
Water supply; sewerage; waste management and remediation activities	106	48.2	49.2	1.9	0.7
Manufacture	2843	56.9	35.9	6.2	0.9
Food services	543	48.8	42.9	5.9	2.4
TURNOVER					
Up to 2 million euro	2511	52.7	39.9	6.6	0.8
2-10 million euro	1587	57.2	36	6	0.8
10-50 million euro	449	67.3	28.7	3	1.1
50 million euro and over	94	71	21.6	7.4	0
ANNUAL TURNOVER OVER THE PAST 2 YRS					
Increased	1461	64.7	29.1	5.5	0.7
Remained unchanged	1518	54.9	38.7	5.8	0.6
Decreased	2110	51.1	40.8	6.9	1.2
MATERIAL COST					
Less than 10%	485	50.7	42.3	6.4	0.6
Between 10% and 29%	1326	56.6	38	4.4	1
Between 30% and 49%	1628	54.5	37.9	6.6	1
50% or more	1236	60.7	33.1	5.7	0.5
ECO-INNOVATION					
Yes	2331	70.7	24.8	3.6	0.8
No	2891	44.4	45.7	8.4	1.5

Table 16a. Changes implemented to reduce material costs in past 5 years: Developing more efficient technologies in-house – *by country*

QUESTION: Q5_e. Have you implemented any changes to reduce material costs in the past 5 years? - Developing more efficient technologies in-house

	Total N	% Mentioned	% Not mentioned	% Not applicable	% DK/NA
EU27	5222	52.8	39.6	6.6	1.1
COUNTRY					
Belgium	201	45	45.9	8.3	0.9
Bulgaria	204	55	40.3	3.8	0.9
Czech Rep.	200	21	75.9	2.2	0.9
Denmark	201	51.1	43	5.4	0.5
Germany	250	55	32.3	11.8	0.9
Estonia	200	59.9	24	10.4	5.7
Greece	201	73	24.5	1.3	1.2
Spain	250	54.1	42	3.5	0.4
France	250	40.4	59.2	0.5	0
Ireland	200	70.7	26.6	2.3	0.4
Italy	251	49.7	43.5	6.3	0.6
Cyprus	50	70.2	23.2	6.6	0
Latvia	202	62.1	30.7	6.6	0.6
Lithuania	202	52.5	28.2	17.1	2.2
Luxembourg	51	62.4	31.7	6	0
Hungary	202	47.4	37.5	12.6	2.5
Malta	50	55.9	42.5	0	1.6
Netherlands	200	34.9	33.5	25	6.7
Austria	200	33	53.9	10.4	2.7
Poland	200	74.5	21	4.2	0.3
Portugal	201	58.8	33.6	7.5	0.1
Romania	200	65.9	30.5	2.1	1.5
Slovenia	200	53.4	41.8	4.7	0
Slovakia	200	30.3	50.5	13.4	5.8
Finland	205	48.5	47.4	2.8	1.3
Sweden	200	43.9	40.3	10.4	5.4
United Kingdom	251	68.9	24.4	5.5	1.2

Table 16b. Changes implemented to reduce material costs in past 5 years: Developing more efficient technologies in-house - *by segments*

QUESTION: Q5_e. Have you implemented any changes to reduce material costs in the past 5 years? - Developing more efficient technologies in-house

	Total N	% Mentioned	% Not mentioned	% Not applicable	% DK/NA
EU27	5222	52.8	39.6	6.6	1.1
COMPANY SIZE					
10–49 employees	4337	50.6	41.1	7.2	1
50+ employees	885	63.1	32.3	3.3	1.4
ACTIVITY					
Agriculture and fishing	205	56.8	35	7.5	0.8
Construction	1526	45.6	45.3	8	1.1
Water supply; sewerage; waste management and remediation activities	106	45.2	51.8	2.3	0.8
Manufacture	2843	58.1	35.5	5.5	0.9
Food services	543	45.1	44.3	8.6	2.1
TURNOVER					
Up to 2 million euro	2511	51.9	41.1	6.2	0.8
2-10 million euro	1587	50.9	40.7	7.5	0.8
10-50 million euro	449	62	33.6	3	1.4
50 million euro and over	94	60.8	31.5	7.8	0
ANNUAL TURNOVER OVER THE PAST 2 YRS					
Increased	1461	58.5	34.6	5.9	1
Remained unchanged	1518	48.8	43.9	6.5	0.7
Decreased	2110	51.5	41	6.7	0.8
MATERIAL COST					
Less than 10%	485	43	50	6.4	0.6
Between 10% and 29%	1326	53.5	39.9	5.8	0.9
Between 30% and 49%	1628	53.1	39.1	7.2	0.6
50% or more	1236	58.3	35.7	5.3	0.7
ECO-INNOVATION					
Yes	2331	69.2	25.9	4.2	0.7
No	2891	39.5	50.6	8.4	1.4

Table 17a. Changes implemented to reduce material costs in past 5 years: Outsourcing production or service activities – *by country*

QUESTION: Q5_f. Have you implemented any changes to reduce material costs in the past 5 years? - Outsourcing production or service activities

	Total N	% Mentioned	% Not mentioned	% Not applicable	% DK/NA
EU27	5222	29.9	60.9	7.6	1.6
COUNTRY					
Belgium	201	30.4	56.3	12	1.4
Bulgaria	204	29.5	65	4	1.5
Czech Rep.	200	14.7	79.9	4.1	1.4
Denmark	201	26	69	3.5	1.5
Germany	250	27.6	61.9	9.6	0.9
Estonia	200	53.9	27.3	15.3	3.5
Greece	201	35.5	64.5	0	0
Spain	250	38.7	56.3	4.6	0.4
France	250	18	79.4	2.3	0.2
Ireland	200	34.5	62	2.1	1.3
Italy	251	27.1	61.3	10.1	1.5
Cyprus	50	35.7	53	9.7	1.6
Latvia	202	51.8	38.8	7.4	2.1
Lithuania	202	41.5	35.2	14.9	8.3
Luxembourg	51	39.4	45	15.6	0
Hungary	202	15.4	64.8	17.4	2.5
Malta	50	32.5	62.6	4.9	0
Netherlands	200	22.8	41.8	28.1	7.3
Austria	200	28.1	55.8	12.3	3.8
Poland	200	36.1	61.4	0.9	1.6
Portugal	201	43.6	47.9	8.4	0.1
Romania	200	38.8	48.8	8.5	3.9
Slovenia	200	30	66.2	3.4	0.5
Slovakia	200	50.9	36	8.6	4.5
Finland	205	44.8	54	1.2	0
Sweden	200	23.5	58.9	11.6	5.9
United Kingdom	251	34.7	56.8	6.6	1.9

Table 17b. Changes implemented to reduce material costs in past 5 years: Outsourcing production or service activities - *by segments*

QUESTION: Q5_f. Have you implemented any changes to reduce material costs in the past 5 years? - Outsourcing production or service activities

	Total N	% Mentioned	% Not mentioned	% Not applicable	% DK/NA
EU27	5222	29.9	60.9	7.6	1.6
COMPANY SIZE					
10–49 employees	4337	29.4	60.8	8.1	1.7
50+ employees	885	32	61.4	5.1	1.5
ACTIVITY					
Agriculture and fishing	205	30.5	57.9	9.6	2
Construction	1526	31.8	58.7	7.6	1.8
Water supply; sewerage; waste management and remediation activities	106	28.3	63.4	7.1	1.2
Manufacture	2843	31	60.3	7.3	1.4
Food services	543	18.4	70.8	8.1	2.7
TURNOVER					
Up to 2 million euro	2511	28.6	62.7	7.4	1.3
2-10 million euro	1587	30	62.1	7	1
10-50 million euro	449	35.8	57.6	5.7	0.9
50 million euro and over	94	52	40.2	6.6	1.3
ANNUAL TURNOVER OVER THE PAST 2 YRS					
Increased	1461	31.9	59.9	7.1	1.2
Remained unchanged	1518	27	63.3	8.2	1.5
Decreased	2110	30.9	60.4	7.3	1.4
MATERIAL COST					
Less than 10%	485	20	69.6	9.6	0.9
Between 10% and 29%	1326	28.7	62.5	7.5	1.3
Between 30% and 49%	1628	29.2	63.3	6.3	1.3
50% or more	1236	36.2	55.9	6.6	1.3
ECO-INNOVATION					
Yes	2331	37.2	54.6	6.8	1.4
No	2891	23.9	66.1	8.2	1.8

Table 18a. Changes implemented to reduce material costs in past 5 years: Recycling – *by country*

QUESTION: Q5_g. Have you implemented any changes to reduce material costs in the past 5 years? - Recycling

	Total N	% Mentioned	% Not mentioned	% Not applicable	% DK/NA
EU27	5222	52	39.5	7.6	0.9
COUNTRY					
Belgium	201	58.7	33	8.3	0
Bulgaria	204	29	62	9	0
Czech Rep.	200	32.3	64.4	2.3	1
Denmark	201	30.4	61.8	7.3	0.5
Germany	250	47	41.9	10.6	0.4
Estonia	200	34.2	43.8	18.9	3.1
Greece	201	78.2	19.4	2.4	0
Spain	250	80.5	18	1.2	0.4
France	250	50.2	49.5	0.2	0
Ireland	200	82	15.9	2.1	0
Italy	251	34.5	52.9	11.4	1.2
Cyprus	50	61.3	21.4	17.3	0
Latvia	202	34.7	49.9	14.7	0.6
Lithuania	202	24.2	45.3	28.4	2.2
Luxembourg	51	68	27.7	4.3	0
Hungary	202	22.2	49.9	25.4	2.5
Malta	50	66.9	21.6	11.5	0
Netherlands	200	47.7	29.8	17.7	4.8
Austria	200	43.4	44.8	9.1	2.7
Poland	200	55.4	41.2	3	0.4
Portugal	201	60.8	27.3	11.8	0.1
Romania	200	48.4	35.1	14.6	1.9
Slovenia	200	47.6	45.7	6.2	0.5
Slovakia	200	50.1	32.8	11.9	5.2
Finland	205	79.2	19.6	0.7	0.5
Sweden	200	53.2	32.2	9	5.6
United Kingdom	251	82.1	15.6	2.2	0

Table 18b. Changes implemented to reduce material costs in past 5 years: Recycling - *by segments*

QUESTION: Q5_g. Have you implemented any changes to reduce material costs in the past 5 years? - Recycling

	Total N	% Mentioned	% Not mentioned	% Not applicable	% DK/NA
EU27	5222	52	39.5	7.6	0.9
COMPANY SIZE					
10–49 employees	4337	50.7	40.5	7.9	0.9
50+ employees	885	58.5	34.9	5.7	1
ACTIVITY					
Agriculture and fishing	205	41.1	48.6	8.6	1.7
Construction	1526	51.7	38.9	8.6	0.9
Water supply; sewerage; waste management and remediation activities	106	34	59.3	6.4	0.3
Manufacture	2843	52.3	39.3	7.5	0.8
Food services	543	58.6	35.1	4.8	1.5
TURNOVER					
Up to 2 million euro	2511	49.8	41.6	7.9	0.7
2-10 million euro	1587	52.8	39.9	6.6	0.7
10-50 million euro	449	61.4	33.1	4.7	0.8
50 million euro and over	94	53.1	34.7	9.6	2.6
ANNUAL TURNOVER OVER THE PAST 2 YRS					
Increased	1461	53.6	38.3	7.4	0.7
Remained unchanged	1518	47.5	44	7.7	0.8
Decreased	2110	53.7	38	7.5	0.9
MATERIAL COST					
Less than 10%	485	52.9	40.9	5.8	0.4
Between 10% and 29%	1326	53.7	40	5.3	1
Between 30% and 49%	1628	50	41.9	7.4	0.7
50% or more	1236	52.4	38.2	9	0.5
ECO-INNOVATION					
Yes	2331	63.6	29.5	6.1	0.8
No	2891	42.6	47.6	8.8	1

Table 19a. Share of eco-innovation-related investments in last 5 years – *by country*

QUESTION: Q6. Over the last 5 years, what share of innovation investments in your company were related to eco-innovation, i.e. implementing new or substantially improved solutions resulting in more efficient use in material, energy and water?

	Total N	% More than 50%	% Between 30% and 49%	% Between 10% and 29%	% Less than 10%	% None	% No innovative activities	% DK/NA
EU27	5222	5.8	10.4	24.5	35.4	16.1	2.3	5.5
COUNTRY								
Belgium	201	7.2	6.2	25.2	37.2	11	2.4	10.8
Bulgaria	204	6.2	7.8	28.2	31.8	15.2	6.9	3.9
Czech Rep.	200	3.6	1.8	33.6	44	12	0	5.1
Denmark	201	3.8	9.2	17.8	43.5	16.6	2.4	6.7
Germany	250	4.8	11.5	26	41.3	13.4	0.8	2.2
Estonia	200	7.9	8.8	23.1	36.2	13.6	6.9	3.6
Greece	201	11.3	10.5	27.5	25.9	15	6.7	3
Spain	250	6.3	14.4	21.6	38.1	15.3	0.8	3.5
France	250	2.8	6.2	15	41.2	27.5	3.3	3.9
Ireland	200	6.8	11.7	34.2	38.8	3	0.4	5.1
Italy	251	2.9	11.6	27.9	32.5	16.8	1.1	7.3
Cyprus	50	9.3	14.5	28	18.8	18.2	6.2	5
Latvia	202	5.4	7.4	16.5	35.2	31	3.5	1
Lithuania	202	4.9	7.5	22.7	32.2	17.3	11.4	4
Luxembourg	51	1.7	21.8	44.4	26.1	3.4	2.6	0
Hungary	202	6.5	9	16.8	29.9	25.9	6.2	5.7
Malta	50	6.6	5.6	21.6	32	27.6	0	6.7
Netherlands	200	7.3	10.7	18.8	36.9	14.8	3.5	7.8
Austria	200	11.8	11.3	28.2	30.9	10.7	3.3	3.8
Poland	200	14.4	16	33.8	22.7	9.2	0.9	3.1
Portugal	201	4	9.5	22.2	40	14.2	6.5	3.5
Romania	200	6.3	10.6	23.5	29.8	16.7	5.1	7.9
Slovenia	200	8.5	8.6	26.5	32.3	17.2	2.5	4.3
Slovakia	200	3.4	11.3	26	34.3	12.9	2.6	9.4
Finland	205	9.1	7.3	22.4	43	11.5	3.2	3.4
Sweden	200	11.8	9	19.3	27.9	15.1	5.3	11.7
United Kingdom	251	5.5	8.2	26.9	33.9	11.1	1.1	13.4

Table 19b. Share of eco-innovation-related investments in last 5 years - *by segments*

QUESTION: Q6. Over the last 5 years, what share of innovation investments in your company were related to eco-innovation, i.e. implementing new or substantially improved solutions resulting in more efficient use in material, energy and water?

	Total N	% More than 50%	% Between 30% and 49%	% Between 10% and 29%	% Less than 10%	% None	% No innovative activities	% DK/NA
EU27	5222	5.8	10.4	24.5	35.4	16.1	2.3	5.5
COMPANY SIZE								
10–49 employees	4337	5.7	10.2	24.1	35.3	16.9	2.6	5.1
50+ employees	885	6.2	11.3	26.4	35.5	12.1	1	7.5
ACTIVITY								
Agriculture and fishing	205	10.5	8.7	35.3	29.1	12.2	0.8	3.3
Construction	1526	4.6	10.8	25	35.8	16.4	2.9	4.5
Water supply; sewerage; waste management and remediation activities	106	10	10.6	20.7	27.7	19.5	6.1	5.3
Manufacture	2843	6.4	9.9	23.9	36.2	15.9	2.1	5.6
Food services	543	3.4	12.2	22.8	33.8	16.6	1.9	9.2
TURNOVER								
Up to 2 million euro	2511	5.4	9.5	25	35.9	17.7	2.7	3.7
2-10 million euro	1587	6.8	9.6	23	38.3	15.5	1.8	5
10-50 million euro	449	6.9	15.5	29.3	36.1	7.9	1	3.2
50 million euro and over	94	1.2	18.3	19.4	31.8	17.8	1.9	9.6
ANNUAL TURNOVER OVER THE PAST 2 YRS								
Increased	1461	7.5	12.1	25.6	34.7	12.9	2.2	5
Remained unchanged	1518	6	10.2	23.9	36.1	17.1	2.2	4.5
Decreased	2110	4.6	9.5	24.5	36.4	18.2	2.2	4.5
MATERIAL COST								
Less than 10%	485	5.9	6.8	14.3	43.5	26.3	2	1.2
Between 10% and 29%	1326	5.4	11.7	28.1	38.9	12.8	1.1	1.9
Between 30% and 49%	1628	5.9	11.4	25.2	36	18	1.9	1.8
50% or more	1236	7.2	10.8	26.7	35.4	13.7	1.5	4.6
ECO-INNOVATION								
Yes	2331	10.1	15.6	34.2	29.8	5.1	0.5	4.7
No	2891	2.4	6.2	16.6	39.9	24.9	3.8	6.2

Table 20a. Introduction of various eco-innovations in past 2 years – *by country*

QUESTION: D5. During the past 24 months have you introduced the following eco-innovation

% of "Yes" shown

	Total N	A new or significantly improved eco-innovative product or service to the market	A new or significantly improved eco-innovative production process or method	A new or significantly improved eco-innovative organisational method
EU27	5222	24.8	28.8	23.5
COUNTRY				
Belgium	201	20	24.6	20.6
Bulgaria	204	18.4	24.8	23.8
Czech Rep.	200	20.7	22	19.1
Denmark	201	19.1	28.4	13.4
Germany	250	24.9	26	21.2
Estonia	200	13.9	24.9	19.7
Greece	201	27.9	33.4	25.3
Spain	250	22.1	33.7	31.2
France	250	23.5	23.4	24.1
Ireland	200	24.9	31.5	28.4
Italy	251	30.5	28.8	20.2
Cyprus	50	39.5	22.7	17
Latvia	202	25.7	28.9	20.8
Lithuania	202	22.6	20.2	14.8
Luxembourg	51	30.8	34.5	35.4
Hungary	202	12	15.4	11.9
Malta	50	29.8	34.9	30.5
Netherlands	200	21.6	31.8	27.6
Austria	200	27.3	27.3	20.2
Poland	200	26.3	42.2	35.4
Portugal	201	28.6	34.4	30.1
Romania	200	27.6	31.6	27.5
Slovenia	200	24	26.7	19
Slovakia	200	19.9	24.3	22.6
Finland	205	19.2	25.9	7
Sweden	200	19.4	29.8	17.4
United Kingdom	251	24.7	28.3	17.6

Table 20b. Introduction of various eco-innovations in past 2 years - *by segments*

QUESTION: D5. During the past 24 months have you introduced the following eco-innovation

% of "Yes" shown

	Total N	A new or significantly improved eco-innovative product or service to the market	A new or significantly improved eco-innovative production process or method	A new or significantly improved eco-innovative organisational method
EU27	5222	24.8	28.8	23.5
COMPANY SIZE				
10–49 employees	4337	24	26.4	21.6
50+ employees	885	28.6	40.5	32.4
ACTIVITY				
Agriculture and fishing	205	23.2	39.8	31.2
Construction	1526	25.3	23	21.7
Water supply; sewerage; waste management and remediation activities	106	22.7	28.7	18.3
Manufacture	2843	24.1	30.8	22.4
Food services	543	27.4	30.4	32.4
TURNOVER				
Up to 2 million euro	2511	24.3	25.4	21.4
2-10 million euro	1587	25.1	31.8	23.8
10-50 million euro	449	27.8	39.2	32
50 million euro and over	94	24.7	31.7	30.5
ANNUAL TURNOVER OVER THE PAST 2 YRS				
Increased	1461	30	35.3	29.4
Remained unchanged	1518	24.4	25.3	20.8
Decreased	2110	21.5	26.8	21.3
MATERIAL COST				
Less than 10%	485	20.5	23.1	19.9
Between 10% and 29%	1326	26.1	29.3	26.2
Between 30% and 49%	1628	25	29.3	23.9
50% or more	1236	26.4	31.1	22.4
ECO-INNOVATION				
Yes	2331	55.4	64.5	52.6
No	2891	0	0	0

Table 21a. Relevance of eco-innovation companies have introduced in terms of resource efficiency in the past 2 years – *by country*

QUESTION: Q0. How would you describe the relevance of innovation you have introduced in the past 24 months in terms of resource efficiency?

Base: companies that introduced at least one eco-innovation

	Total N	% Less than 5% reduction of material use per unit output	% Between 5% to 19% reduction of material use per unit output	% Between 20% to 39% reduction of material use per unit output	% Between 40% to 60% reduction of material use per unit output	% More than 60% reduction of material use per unit output	% DK/NA
EU27	2331	34.2	42.4	10.4	1.8	1.7	9.5
COUNTRY							
Belgium	76	23.6	41.1	16.8	0	3.4	15.1
Bulgaria	77	28.9	39	15.9	0	0	16.2
Czech Rep.	82	41.5	32.3	9.2	10.5	1.1	5.4
Denmark	93	47.8	23.6	16.5	1.1	2.2	8.8
Germany	118	38.9	49	3.5	1.4	0	7.2
Estonia	76	35.2	33.8	14.7	3.1	1	12.2
Greece	100	24	49.2	11.7	3.4	0	11.7
Spain	119	24	51.9	11.3	2.4	1.2	9.2
France	103	30.3	39.8	12.4	2.8	4.9	9.9
Ireland	93	25.5	56.8	10.7	3.7	2.5	0.9
Italy	106	43.2	32	8	1.3	2	13.4
Cyprus	24	23.8	30.5	13.7	4.1	0	27.9
Latvia	87	28	41.4	13.7	2.9	1.4	12.6
Lithuania	68	39	40.8	6.5	1.2	0	12.5
Luxembourg	25	30.6	42.7	16.4	5.4	0	4.9
Hungary	54	42.4	34.4	8.9	0	0	14.2
Malta	26	45	28.8	6.3	0	0	20
Netherlands	96	42.8	32.8	8.3	1.7	2.7	11.9
Austria	96	30.1	39.5	14.6	0.8	1.2	13.7
Poland	125	34.9	50.1	11.1	0	1.8	2.1
Portugal	91	28.4	43.9	18.2	1.8	3.3	4.4
Romania	83	20.6	52.3	10.6	4.3	2.5	9.6
Slovenia	92	31.2	45.5	15.2	4.1	0	4
Slovakia	82	29.4	47.6	2.7	0	5	15.3
Finland	81	46.2	44.8	4.6	0	0.9	3.5
Sweden	86	31	34.5	7.4	3.5	0	23.6
United Kingdom	102	30.7	38	18.9	0.8	0	11.7

Table 21b. Relevance of eco-innovation companies have introduced in terms of resource efficiency in the past 2 years - *by segments*

QUESTION: Q0. How would you describe the relevance of innovation you have introduced in the past 24 months in terms of resource efficiency?

Base: companies that introduced at least one eco-innovation

	Total N	% Less than 5% reduction of material use per unit output	% Between 5% to 19% reduction of material use per unit output	% Between 20% to 39% reduction of material use per unit output	% Between 40% to 60% reduction of material use per unit output	% More than 60% reduction of material use per unit output	% DK/NA
EU27	2331	34.2	42.4	10.4	1.8	1.7	9.5
COMPANY SIZE							
10–49 employees	1832	33.5	43.4	10.5	1.7	1.8	9
50+ employees	499	36.4	38.6	10.1	2	1.6	11.4
ACTIVITY							
Agriculture and fishing	112	28.6	46.5	11.6	3.9	0.9	8.5
Construction	620	33.9	42	11.4	2	1.4	9.3
Water supply; sewerage; waste management and remediation activities	43	25.6	39.4	4.6	9	1.3	20.1
Manufacture	1298	35.5	41.6	10.3	1.2	1.8	9.6
Food services	257	31.8	45.9	8.7	2	3.1	8.5
TURNOVER							
Up to 2 million euro	1037	31.8	46.1	10.4	1.5	2.5	7.8
2-10 million euro	767	40.4	43.1	8.4	1.3	0.4	6.3
10-50 million euro	247	30.1	35.6	17.6	3.3	1.6	11.8
50 million euro and over	44	33.6	37.1	14.4	0	2	12.9
ANNUAL TURNOVER OVER THE PAST 2 YRS							
Increased	772	31.6	43.6	11.7	1	1.5	10.6
Remained unchanged	643	39.1	39.9	10.4	1.6	2.1	6.9
Decreased	861	33	44.7	8.3	2.2	1.7	10.1
MATERIAL COST							
Less than 10%	183	38.6	45.8	6.9	2.1	2	4.7
Between 10% and 29%	618	34.8	45.5	9.6	1.1	0.6	8.4
Between 30% and 49%	731	33.4	44.2	11.9	1.9	1.2	7.3
50% or more	594	32.5	42.2	11.5	2.1	3.9	7.8
ECO-INNOVATION							
Yes	2331	34.2	42.4	10.4	1.8	1.7	9.5
No	0	0	0	0	0	0	0

Table 22a. Barriers to accelerated eco-innovation: Lack of funds within enterprise – *by country*

QUESTION: Q7_a. I will list you some barriers that could represent an obstacle to accelerated eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very serious, somewhat serious, not serious or not at all serious barrier in case of your company? - Lack of funds within enterprise

	Total N	% Not at all serious	% Not serious	% Somewhat serious	% Very serious	% Not applicable	% DK/NA
EU27	5222	14.2	17.2	26.5	35.8	4.9	1.5
COUNTRY							
Belgium	201	20.8	20.5	26.3	17.7	9.1	5.6
Bulgaria	204	8.9	11.8	25.6	49.8	3.9	0
Czech Rep.	200	2.4	27	38	30.7	1	1
Denmark	201	27.6	29.6	24.5	11.4	5.9	1
Germany	250	20.3	25.6	24.5	24.3	4.9	0.4
Estonia	200	28.4	11.8	24.5	28.1	4.8	2.4
Greece	201	8	7.3	22.1	61.4	1.2	0
Spain	250	6.7	11.8	12.4	67.6	0.9	0.6
France	250	15.4	18.5	33.3	30.1	2.6	0
Ireland	200	9.9	17.8	30.5	36.6	3.7	1.5
Italy	251	13.1	13.1	28.6	39.6	4.4	1.2
Cyprus	50	10.1	5.8	21.7	58	2.9	1.6
Latvia	202	20	9.9	23.4	43.5	2.4	0.7
Lithuania	202	6.1	16.9	34.4	39.8	1.2	1.6
Luxembourg	51	18.6	10.5	32.2	36.1	1.7	0.9
Hungary	202	8.7	8	17.8	53.5	10.8	1.3
Malta	50	16.5	7.7	22.5	49.9	3.3	0
Netherlands	200	13.5	18.6	20.1	22.9	23.2	1.7
Austria	200	17.7	18.4	34.9	23.7	4.3	1
Poland	200	11.4	16	32.5	38.1	1.5	0.5
Portugal	201	10.4	19.8	26.9	36.8	5.4	0.6
Romania	200	13	7.7	20.9	50.5	3.6	4.3
Slovenia	200	7.3	16.6	34.9	40.3	0.5	0.5
Slovakia	200	2.5	15.1	34	37.1	4.3	6.9
Finland	205	23.1	32	28.8	15	0.7	0.5
Sweden	200	43.3	21.8	18.1	12.2	0.8	3.9
United Kingdom	251	15.6	17.4	25.5	22.4	13.1	6

Table 22b. Barriers to accelerated eco-innovation: Lack of funds within enterprise - *by segments*

QUESTION: Q7_a. I will list you some barriers that could represent an obstacle to accelerated eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very serious, somewhat serious, not serious or not at all serious barrier in case of your company? - Lack of funds within enterprise

	Total N	% Not at all serious	% Not serious	% Somewhat serious	% Very serious	% Not applicable	% DK/NA
EU27	5222	14.2	17.2	26.5	35.8	4.9	1.5
COMPANY SIZE							
10–49 employees	4337	13.9	15.7	26.3	37.8	4.9	1.5
50+ employees	885	15.6	24.5	27.3	26.2	4.8	1.6
ACTIVITY							
Agriculture and fishing	205	8.6	14.7	29.4	40.5	5.8	1.1
Construction	1526	13.1	17.2	29.1	34.4	4.8	1.5
Water supply; sewerage; waste management and remediation activities	106	19	21.8	26.8	29.1	3.2	0.1
Manufacture	2843	15.4	17.5	24.6	36.1	4.7	1.5
Food services	543	11.9	15.3	27.5	37.8	5.9	1.5
TURNOVER							
Up to 2 million euro	2511	12.3	13.7	26	43.4	3.8	0.7
2-10 million euro	1587	15.8	21.1	26.9	29.8	5.1	1.2
10-50 million euro	449	19.3	26.8	24.6	22.8	5.9	0.6
50 million euro and over	94	11.2	25.8	30.8	22.9	4.4	4.9
ANNUAL TURNOVER OVER THE PAST 2 YRS							
Increased	1461	16.3	22.4	27.8	27	5.6	0.9
Remained unchanged	1518	16.2	19.8	27.7	31.4	3.5	1.5
Decreased	2110	11.2	11.7	24.6	46.3	5.2	1
MATERIAL COST							
Less than 10%	485	18.6	14.6	31.4	28.4	6.5	0.4
Between 10% and 29%	1326	13.8	17.4	27.7	36.9	3.3	0.9
Between 30% and 49%	1628	13.8	16.5	26.5	38.1	4.6	0.5
50% or more	1236	14.4	19	24.6	37.1	4	1
ECO-INNOVATION							
Yes	2331	13.5	17.6	28.7	36.6	2.8	0.8
No	2891	14.7	16.9	24.7	35.2	6.5	2

Table 23a. Barriers to accelerated eco-innovation: Lack of external financing – *by country*

QUESTION: Q7_b. I will list you some barriers that could represent an obstacle to accelerated eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very serious, somewhat serious, not serious or not at all serious barrier in case of your company? - Lack of external financing

	Total N	% Not at all serious	% Not serious	% Somewhat serious	% Very serious	% Not applicable	% DK/NA
EU27	5222	14.6	18.5	25.9	30.8	8.4	1.8
COUNTRY							
Belgium	201	20.6	19.8	18.3	24.9	11.9	4.5
Bulgaria	204	7.5	17	25.9	45.3	3.1	1.1
Czech Rep.	200	5.4	41.2	29.5	20.5	1.9	1.5
Denmark	201	27.5	33.6	16	13.1	8.9	0.9
Germany	250	20.4	28.3	24.7	16.2	9.2	1.2
Estonia	200	30.8	14.2	22.1	19.6	11.6	1.7
Greece	201	5.8	4	24.7	63.9	1.5	0
Spain	250	8	10.8	17.5	60.8	2.1	0.8
France	250	17.5	15.3	38.1	20.4	8.5	0.2
Ireland	200	11.2	16.7	29.1	36.6	4	2.3
Italy	251	14.3	13.4	26.5	39.2	5.4	1.2
Cyprus	50	7.2	8.5	14.3	49.4	9.1	11.4
Latvia	202	25.1	8.9	17.1	37.9	10.5	0.5
Lithuania	202	2.3	15.6	31.3	33	10.5	7.2
Luxembourg	51	13.2	8.6	34.7	34.2	9.3	0
Hungary	202	8.2	6.7	14	48.8	19.2	3.2
Malta	50	9.9	11.1	16.4	42.6	19.9	0
Netherlands	200	12.7	23.7	15.4	20.1	25.7	2.5
Austria	200	12.1	25.8	25.2	27.5	7.4	2.1
Poland	200	9.5	20	32.1	32.8	5.2	0.3
Portugal	201	16.1	15.3	25.3	31.1	11	1.2
Romania	200	12.8	12.4	23.3	34.5	10.6	6.4
Slovenia	200	10.5	24.2	37.4	25.1	1.1	1.7
Slovakia	200	5.6	18.1	29.8	33.1	6.3	7.1
Finland	205	27.5	32.3	28.2	9.3	1.7	1
Sweden	200	41.2	19.7	21.3	7.7	5.6	4.5
United Kingdom	251	14	20.5	20.3	23.3	17.2	4.7

Table 23b. Barriers to accelerated eco-innovation: Lack of external financing - *by segments*

QUESTION: Q7_b. I will list you some barriers that could represent an obstacle to accelerated eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very serious, somewhat serious, not serious or not at all serious barrier in case of your company? - Lack of external financing

	Total N	% Not at all serious	% Not serious	% Somewhat serious	% Very serious	% Not applicable	% DK/NA
EU27	5222	14.6	18.5	25.9	30.8	8.4	1.8
COMPANY SIZE							
10–49 employees	4337	14.1	17.7	26.2	31.9	8.3	1.8
50+ employees	885	17.1	22	24.4	25.5	9.1	1.9
ACTIVITY							
Agriculture and fishing	205	10.2	22.2	29.5	30	7.6	0.5
Construction	1526	12.6	18.4	28.2	31.3	7.9	1.6
Water supply; sewerage; waste management and remediation activities	106	23.3	15.6	33.2	23.5	3.5	0.8
Manufacture	2843	16.1	19	24.1	31.2	7.7	1.9
Food services	543	12.3	15.2	26.1	28.5	15.1	2.8
TURNOVER							
Up to 2 million euro	2511	13.1	16.7	26.9	35.1	7.1	1.2
2-10 million euro	1587	17.1	21.1	24.9	25.6	9.9	1.4
10-50 million euro	449	19.4	24.5	23.7	24.6	6.4	1.4
50 million euro and over	94	6.4	21.4	35.9	20.9	11.3	4.1
ANNUAL TURNOVER OVER THE PAST 2 YRS							
Increased	1461	18.6	22.5	24.9	23.9	8.3	1.7
Remained unchanged	1518	14.3	19.9	27.4	27.4	9.5	1.4
Decreased	2110	12	14.3	26	38.4	7.7	1.6
MATERIAL COST							
Less than 10%	485	17.9	12.9	31.9	28.9	7.8	0.7
Between 10% and 29%	1326	16.5	18.8	27.7	30.2	5.8	1.1
Between 30% and 49%	1628	14	20.2	25.2	31.5	8	1.1
50% or more	1236	13.9	19.3	23.7	32.8	8.9	1.5
ECO-INNOVATION							
Yes	2331	14.8	18.1	25.8	33.7	6.3	1.2
No	2891	14.5	18.7	26	28.4	10.1	2.3

Table 24a. Barriers to accelerated eco-innovation: Uncertain return on investment or too long payback period for eco-innovation – *by country*

QUESTION: Q7_c. I will list you some barriers that could represent an obstacle to accelerated eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very serious, somewhat serious, not serious or not at all serious barrier in case of your company? - Uncertain return on investment or too long payback period for eco-innovation

	Total N	% Not at all serious	% Not serious	% Somewhat serious	% Very serious	% Not applicable	% DK/NA
EU27	5222	10.5	14.3	32.4	31.7	7.6	3.4
COUNTRY							
Belgium	201	14.6	18	28.4	21.5	12.1	5.4
Bulgaria	204	5.9	8.9	28.9	46.7	6	3.6
Czech Rep.	200	1.8	23.1	44.6	23.2	3.3	4.1
Denmark	201	12.5	19.4	36.8	21.8	5.9	3.7
Germany	250	11.2	15	29	31.9	9.6	3.3
Estonia	200	14.9	8.6	28.6	30.7	10.4	6.9
Greece	201	5.5	7.9	37.1	45.3	2.4	1.6
Spain	250	6.4	8.6	26.7	52.8	2.9	2.7
France	250	14.4	13.3	45.9	17.8	6.9	1.8
Ireland	200	11.2	14.5	40.5	26.6	4.1	3.1
Italy	251	13.7	19.7	28.5	30.5	5	2.7
Cyprus	50	4.7	7.8	28.5	43.4	4.7	11
Latvia	202	21.8	9.9	20.5	34.9	10.5	2.4
Lithuania	202	5.7	7.9	32.1	33.6	10.4	10.3
Luxembourg	51	12.2	15.8	37.9	32.4	1.7	0
Hungary	202	3.1	4.5	13.7	56.5	18.3	3.8
Malta	50	5.5	7.8	13.8	61.9	7.7	3.3
Netherlands	200	6.5	9.2	23.9	38.6	19.1	2.8
Austria	200	5.1	14.6	29	40.6	6.5	4.1
Poland	200	9	13.3	38	36.5	3.2	0
Portugal	201	11	20.3	29.5	31.8	6.8	0.6
Romania	200	10.4	15.9	28	33.7	5.2	7
Slovenia	200	6.4	20.7	33.8	31.4	6.2	1.4
Slovakia	200	2	10.7	36.3	37.2	5.8	7.9
Finland	205	10.1	18.1	43.7	23.8	2.6	1.7
Sweden	200	21.6	15.8	30.3	18.4	5.9	8
United Kingdom	251	9.7	12.2	33.8	18.5	17.4	8.4

Table 24b. Barriers to accelerated eco-innovation: Uncertain return on investment or too long payback period for eco-innovation - *by segments*

QUESTION: Q7_c. I will list you some barriers that could represent an obstacle to accelerated eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very serious, somewhat serious, not serious or not at all serious barrier in case of your company? - Uncertain return on investment or too long payback period for eco-innovation

	Total N	% Not at all serious	% Not serious	% Somewhat serious	% Very serious	% Not applicable	% DK/NA
EU27	5222	10.5	14.3	32.4	31.7	7.6	3.4
COMPANY SIZE							
10–49 employees	4337	10.3	14.1	31.8	32.4	7.8	3.5
50+ employees	885	11.4	15	35.4	28.4	6.5	3.3
ACTIVITY							
Agriculture and fishing	205	5.1	12.6	35.5	39.1	6.1	1.7
Construction	1526	10	13.1	30.6	33.7	8.8	3.8
Water supply; sewerage; waste management and remediation activities	106	13.3	20.3	31.9	26.9	6.9	0.7
Manufacture	2843	10.8	15.5	32.7	30.8	7.1	3.1
Food services	543	11.6	10.9	35.2	29.3	7.7	5.3
TURNOVER							
Up to 2 million euro	2511	10.4	13.3	31.9	34.6	7.2	2.6
2-10 million euro	1587	12.4	16.1	31.4	29.9	7.1	3.1
10-50 million euro	449	7.5	15.7	40.2	27.5	6.2	2.8
50 million euro and over	94	9.1	12.1	39.4	30.4	4.3	4.6
ANNUAL TURNOVER OVER THE PAST 2 YRS							
Increased	1461	10.1	14.9	36.4	27.7	7.2	3.7
Remained unchanged	1518	11.8	14.3	32.3	29.7	8.2	3.6
Decreased	2110	9.6	14.2	29.5	36.8	7.3	2.5
MATERIAL COST							
Less than 10%	485	17.3	15.2	29.4	28.2	8.9	1.1
Between 10% and 29%	1326	12.2	12.8	36.5	31.1	5.4	2.1
Between 30% and 49%	1628	9.6	14.8	32	33.5	7.5	2.6
50% or more	1236	9.1	15.2	30.5	36.8	6.1	2.2
ECO-INNOVATION							
Yes	2331	10	14.3	34.1	35	4.3	2.2
No	2891	10.9	14.3	31.1	29.1	10.3	4.4

Table 25a. Barriers to accelerated eco-innovation: Lack of qualified personnel and technological capabilities within the enterprise – *by country*

QUESTION: Q7_d. I will list you some barriers that could represent an obstacle to accelerated eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very serious, somewhat serious, not serious or not at all serious barrier in case of your company? - Lack of qualified personnel and technological capabilities within the enterprise

	Total N	% Not at all serious	% Not serious	% Somewhat serious	% Very serious	% Not applicable	% DK/NA
EU27	5222	19.5	22.4	27.6	23	6.3	1.1
COUNTRY							
Belgium	201	12.7	15.1	21.2	39.6	9.2	2.2
Bulgaria	204	12	22.5	25.4	35.3	4.2	0.5
Czech Rep.	200	8.1	50.9	21.3	17.8	0.9	1
Denmark	201	24.5	34.7	26.8	7.4	6.5	0
Germany	250	20.3	23.7	26.7	24.1	5.2	0
Estonia	200	33.5	13.9	27.9	19.5	4.7	0.5
Greece	201	17.1	17.3	36.1	27.4	1.7	0.4
Spain	250	19.4	19.2	21.9	37	2.1	0.4
France	250	17.6	18.3	41.6	18.2	4.3	0
Ireland	200	17.5	28	31.5	17.6	4.6	0.8
Italy	251	20.2	23.1	26.8	22.1	7.1	0.8
Cyprus	50	16.3	7.2	31.6	37.1	3.5	4.3
Latvia	202	33.5	11.2	16.2	30	8.5	0.5
Lithuania	202	6.3	24.9	27.4	31.3	7.5	2.7
Luxembourg	51	5.7	12.2	36.4	44	1.7	0
Hungary	202	33.1	16.8	14.5	16.8	17.3	1.5
Malta	50	30.9	16	13.2	34.4	5.5	0
Netherlands	200	14.7	23.5	19.6	23.3	17.5	1.5
Austria	200	13.4	22	28.2	32.6	3.3	0.5
Poland	200	23.3	29.5	31.3	11.5	4	0.5
Portugal	201	19.4	21.4	21.7	31.4	6	0.1
Romania	200	22.3	15.7	21.7	33.9	3.2	3.3
Slovenia	200	6.4	25.9	32.9	31	3.7	0
Slovakia	200	12.2	28	30.4	19.4	4.3	5.6
Finland	205	21.6	31.6	35.7	9.3	0.5	1.3
Sweden	200	21.9	25.4	29.4	17.3	2.5	3.5
United Kingdom	251	21.6	16.3	23.3	17.5	16.1	5.2

Table 25b. Barriers to accelerated eco-innovation: Lack of qualified personnel and technological capabilities within the enterprise - *by segments*

QUESTION: Q7_d. I will list you some barriers that could represent an obstacle to accelerated eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very serious, somewhat serious, not serious or not at all serious barrier in case of your company? - Lack of qualified personnel and technological capabilities within the enterprise

	Total N	% Not at all serious	% Not serious	% Somewhat serious	% Very serious	% Not applicable	% DK/NA
EU27	5222	19.5	22.4	27.6	23	6.3	1.1
COMPANY SIZE							
10–49 employees	4337	19.3	22.8	27	23.3	6.4	1.2
50+ employees	885	20.8	20.7	30.3	21.6	5.8	0.7
ACTIVITY							
Agriculture and fishing	205	14	22.8	31.1	23.2	8.8	0.1
Construction	1526	18.5	22.6	29.3	22.8	5.7	1.1
Water supply; sewerage; waste management and remediation activities	106	12.8	41.9	31.4	12.7	0.4	0.9
Manufacture	2843	20.6	22.6	26.8	22.7	6.3	1.1
Food services	543	20.2	17.1	24.8	27.5	8.4	2.1
TURNOVER							
Up to 2 million euro	2511	19.2	22.9	25.6	25.8	5.7	0.7
2-10 million euro	1587	18.7	22.8	28.7	22.8	6	0.9
10-50 million euro	449	21.6	22.3	34.6	14.9	6.3	0.4
50 million euro and over	94	26.6	26.7	18.6	22	3.4	2.7
ANNUAL TURNOVER OVER THE PAST 2 YRS							
Increased	1461	18.8	23	27.3	23.7	6.4	0.8
Remained unchanged	1518	21.7	23	27.6	21.5	4.9	1.4
Decreased	2110	18.5	22	27.5	24.1	7.1	0.7
MATERIAL COST							
Less than 10%	485	17.2	23.3	32.2	19.2	7.6	0.3
Between 10% and 29%	1326	19.9	20.9	28.6	24.8	5.2	0.7
Between 30% and 49%	1628	18.6	22.5	27.9	24	6.5	0.6
50% or more	1236	21.6	25	27.2	21.4	4.3	0.5
ECO-INNOVATION							
Yes	2331	20.4	21.4	27.9	25.5	4.1	0.7
No	2891	18.9	23.2	27.2	21	8.1	1.5

Table 26a. Barriers to accelerated eco-innovation: Limited access to external information and knowledge, including lack of well-developed technology support services – *by country*

QUESTION: Q7_e. I will list you some barriers that could represent an obstacle to accelerated eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very serious, somewhat serious, not serious or not at all serious barrier in case of your company? - Limited access to external information and knowledge, including lack of well-developed technology support services

	Total N	% Not at all serious	% Not serious	% Somewhat serious	% Very serious	% Not applicable	% DK/NA
EU27	5222	18.9	26.4	26.9	16.3	8.6	2.9
COUNTRY							
Belgium	201	16.9	23.6	25.5	21.9	8.9	3.2
Bulgaria	204	18.8	31.5	27.4	16.3	2.8	3.2
Czech Rep.	200	8.8	57	23	8	1.8	1.5
Denmark	201	26.7	36.6	22.1	3.7	7.7	3.4
Germany	250	24.3	31	21.4	13.5	9	0.8
Estonia	200	37	18.5	21.6	11.6	8.3	3.1
Greece	201	15.8	10.6	40.3	31.4	0.9	1.1
Spain	250	17.2	21.3	22.7	35.2	3.2	0.4
France	250	19.3	27.5	34.9	12.1	5.5	0.6
Ireland	200	16.3	30.5	32.8	13.7	4.2	2.4
Italy	251	17.6	23.2	29.6	19.1	7	3.5
Cyprus	50	7.8	12.4	20.6	38.8	14	6.3
Latvia	202	45	11.7	16.2	17.4	8.6	1.1
Lithuania	202	8.7	31	30.6	14.9	6.8	8.1
Luxembourg	51	19.9	16.5	40.5	14.5	6.9	1.7
Hungary	202	21.9	19.6	13.7	18.9	23.8	2.2
Malta	50	23.2	17.1	19.9	18.7	17.8	3.3
Netherlands	200	13.1	24.2	14.6	14.9	28.8	4.3
Austria	200	13.5	23.5	34	21.3	6.1	1.6
Poland	200	18.3	30.3	31.9	10	6.6	2.9
Portugal	201	19.1	19.2	28.5	20.1	12.5	0.6
Romania	200	21.1	19.5	20.7	23.6	9.2	5.8
Slovenia	200	17.1	30.3	32.2	16.7	2	1.7
Slovakia	200	8.1	33.6	32.8	11.6	6.3	7.6
Finland	205	23	40	22.6	5.1	2.6	6.8
Sweden	200	30.3	22.5	28.6	8	3.3	7.2
United Kingdom	251	15.7	24.1	25.9	7.6	17.8	8.9

Table 26b. Barriers to accelerated eco-innovation: Limited access to external information and knowledge, including lack of well-developed technology support services - *by segments*

QUESTION: Q7_e. I will list you some barriers that could represent an obstacle to accelerated eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very serious, somewhat serious, not serious or not at all serious barrier in case of your company? - Limited access to external information and knowledge, including lack of well-developed technology support services

	Total N	% Not at all serious	% Not serious	% Somewhat serious	% Very serious	% Not applicable	% DK/NA
EU27	5222	18.9	26.4	26.9	16.3	8.6	2.9
COMPANY SIZE							
10–49 employees	4337	18.5	25.4	26.7	17.3	9	3.1
50+ employees	885	21.1	31.1	28	11.7	6.5	1.7
ACTIVITY							
Agriculture and fishing	205	14	31.6	31.4	14.4	7.6	1
Construction	1526	20.2	24.8	28.1	15.6	9.2	2.1
Water supply; sewerage; waste management and remediation activities	106	16.8	37.2	27.2	13.3	2.7	3
Manufacture	2843	19.4	27.9	25.3	16.3	7.9	3.2
Food services	543	15	19.2	30	20	11.9	3.8
TURNOVER							
Up to 2 million euro	2511	18.7	25.5	27	18.3	8.1	2.5
2-10 million euro	1587	20.3	28	24.9	16.3	8	2.5
10-50 million euro	449	21.8	32.5	28.9	9.5	5.7	1.6
50 million euro and over	94	22.7	31.9	15.4	18.3	7.8	3.8
ANNUAL TURNOVER OVER THE PAST 2 YRS							
Increased	1461	19.6	27.5	28.7	13.9	7.9	2.4
Remained unchanged	1518	20.1	25.7	28	16.3	7.3	2.5
Decreased	2110	17.6	26.4	25.1	18.6	9.4	2.9
MATERIAL COST							
Less than 10%	485	19.4	28.6	24.4	15.5	11.2	0.9
Between 10% and 29%	1326	20.7	23.7	30.8	16.8	6	2
Between 30% and 49%	1628	18.9	28.5	24.7	17.2	8.4	2.4
50% or more	1236	19.6	25.9	28.2	17.4	6.9	2
ECO-INNOVATION							
Yes	2331	20.6	26.2	26.9	18.9	5.6	1.9
No	2891	17.6	26.6	26.9	14.3	11	3.7

Table 27a. Barriers to accelerated eco-innovation: Lack of suitable business partners – *by country*

QUESTION: Q7_f. I will list you some barriers that could represent an obstacle to accelerated eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very serious, somewhat serious, not serious or not at all serious barrier in case of your company? - Lack of suitable business partners

	Total N	% Not at all serious	% Not serious	% Somewhat serious	% Very serious	% Not applicable	% DK/NA
EU27	5222	22	25.8	24.7	16	9.4	2.2
COUNTRY							
Belgium	201	17.6	29.6	16.1	16.5	16.6	3.6
Bulgaria	204	15.1	28.1	30.1	21.5	4.6	0.5
Czech Rep.	200	10.5	54.8	17.9	14.1	1	1.8
Denmark	201	26.7	39.8	15.2	6.1	8	4.2
Germany	250	24.8	35.6	18.4	12.6	8.1	0.4
Estonia	200	35.8	17.2	26.5	10.6	8.1	1.7
Greece	201	11.8	11.2	43.2	32	1.9	0
Spain	250	32.1	23.5	16.9	21.3	5.8	0.4
France	250	22.3	20.5	37.1	11	7.7	1.3
Ireland	200	18	34.8	24.6	10.2	10.4	1.9
Italy	251	18.9	24.7	23.5	21.3	8.9	2.7
Cyprus	50	7.8	8	31.8	44.3	3.9	4.3
Latvia	202	42.1	12.6	18.8	16.7	6.6	3.2
Lithuania	202	7.5	23.6	31.8	27.9	5.8	3.5
Luxembourg	51	14.6	13.9	32.4	35.6	3.6	0
Hungary	202	23.8	12	19.5	25.9	16.7	2
Malta	50	23.7	7.2	9.9	14.3	43.7	1.1
Netherlands	200	16.1	23.2	18.4	9	30.9	2.4
Austria	200	18.6	24.7	32.5	17.1	4.8	2.3
Poland	200	22.7	29.8	29.1	12.3	4.6	1.5
Portugal	201	14.6	16.7	35.4	22.2	10.5	0.6
Romania	200	23.8	19.3	22.4	25.7	5.6	3.3
Slovenia	200	10	30	35.6	20	3.4	1
Slovakia	200	6.5	28.2	36.4	18.4	4.1	6.3
Finland	205	25.2	38.7	27.5	5.9	1.4	1.2
Sweden	200	38.7	23.9	21	7.1	3.6	5.6
United Kingdom	251	20.5	20	18.9	9.7	23.9	7

Table 27b. Barriers to accelerated eco-innovation: Lack of suitable business partners - *by segments*

QUESTION: Q7_f. I will list you some barriers that could represent an obstacle to accelerated eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very serious, somewhat serious, not serious or not at all serious barrier in case of your company? - Lack of suitable business partners

	Total N	% Not at all serious	% Not serious	% Somewhat serious	% Very serious	% Not applicable	% DK/NA
EU27	5222	22	25.8	24.7	16	9.4	2.2
COMPANY SIZE							
10–49 employees	4337	21.3	24.7	25.2	17.2	9.2	2.2
50+ employees	885	25.1	30.8	21.9	10.1	10.2	1.9
ACTIVITY							
Agriculture and fishing	205	18.1	35.2	26.7	11.2	8.3	0.5
Construction	1526	22.3	24.5	27	14.7	10	1.6
Water supply; sewerage; waste management and remediation activities	106	18.7	28.9	32.7	12.2	4.6	2.9
Manufacture	2843	22.1	26.4	24	17.1	8.1	2.3
Food services	543	22.6	21.6	19.7	16.5	15.9	3.7
TURNOVER							
Up to 2 million euro	2511	21.4	24.4	25.1	19.2	8.2	1.6
2-10 million euro	1587	23.3	29.8	23.7	11.5	9.9	1.9
10-50 million euro	449	27.1	23.2	25.4	15.2	7.3	1.8
50 million euro and over	94	18.6	25.4	31.7	14.2	4.1	6.1
ANNUAL TURNOVER OVER THE PAST 2 YRS							
Increased	1461	22.1	27.2	24.3	15.7	9	1.8
Remained unchanged	1518	22	26.1	26.5	13.6	8.9	2.9
Decreased	2110	21.9	24.6	23.8	18.4	9.9	1.5
MATERIAL COST							
Less than 10%	485	24.9	26.8	26.9	13.7	7	0.7
Between 10% and 29%	1326	22.4	25.2	26.7	16.5	7.2	1.9
Between 30% and 49%	1628	19.5	28	24.2	17.2	9.9	1.2
50% or more	1236	25.1	25.8	24	16.8	6.4	1.7
ECO-INNOVATION							
Yes	2331	22.9	25.7	24.6	18.4	6.9	1.6
No	2891	21.2	25.8	24.8	14.1	11.4	2.7

Table 28a. Barriers to accelerated eco-innovation: Lack of collaboration with research institutes and universities – *by country*

QUESTION: Q7_g. I will list you some barriers that could represent an obstacle to accelerated eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very serious, somewhat serious, not serious or not at all serious barrier in case of your company? - Lack of collaboration with research institutes and universities

	Total N	% Not at all serious	% Not serious	% Somewhat serious	% Very serious	% Not applicable	% DK/NA
EU27	5222	19.3	23.6	21.1	12.8	20.1	3.2
COUNTRY							
Belgium	201	21.3	17.2	19.9	12.7	24	4.9
Bulgaria	204	15.7	24.8	24.6	24	8.4	2.5
Czech Rep.	200	22.1	44	7.9	6.8	16.4	2.9
Denmark	201	28.2	31.8	13.9	6.1	18.2	1.9
Germany	250	20.3	28.4	18.4	6.3	24.6	1.9
Estonia	200	36.2	16.5	16.9	9.9	18.9	1.6
Greece	201	16.3	14.8	29.8	34.5	3.1	1.5
Spain	250	15.2	16	25.9	28.1	13.1	1.8
France	250	22.8	22.4	28.4	6.3	18.4	1.6
Ireland	200	19.2	27.5	24.5	17.3	10	1.5
Italy	251	14.3	24.4	21.8	17.5	17.9	4.1
Cyprus	50	18.9	18.9	13.7	32.4	9.1	7
Latvia	202	35.3	8.6	10.6	14.2	29.6	1.7
Lithuania	202	10.3	25.4	25.7	8.6	27	3
Luxembourg	51	19.4	12.9	17.8	28.1	19.1	2.6
Hungary	202	19.1	7.7	8.5	11.6	51.6	1.6
Malta	50	12.2	5.5	7.7	18.6	52	3.9
Netherlands	200	15.1	21	10.6	9.5	41.4	2.4
Austria	200	15.7	24.7	26.9	17.9	12.1	2.6
Poland	200	26.5	29.2	21	7.2	13.6	2.5
Portugal	201	17.3	17.9	24.3	17.2	22.3	0.9
Romania	200	19.5	15.5	17.5	23	19.2	5.4
Slovenia	200	11.3	28.1	32.5	14.7	10.6	2.9
Slovakia	200	8.4	34.2	22.8	11.9	13.4	9.2
Finland	205	28.3	35.6	19.2	6.1	9.2	1.7
Sweden	200	29.4	27.5	13.2	5.7	16.9	7.3
United Kingdom	251	18	22	19	7	25.6	8.4

Table 28b. Barriers to accelerated eco-innovation: Lack of collaboration with research institutes and universities - *by segments*

QUESTION: Q7_g. I will list you some barriers that could represent an obstacle to accelerated eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very serious, somewhat serious, not serious or not at all serious barrier in case of your company? - Lack of collaboration with research institutes and universities

	Total N	% Not at all serious	% Not serious	% Somewhat serious	% Very serious	% Not applicable	% DK/NA
EU27	5222	19.3	23.6	21.1	12.8	20.1	3.2
COMPANY SIZE							
10–49 employees	4337	19.2	23.1	19.4	13.5	21.3	3.4
50+ employees	885	19.4	26.1	29.2	9.1	13.9	2.3
ACTIVITY							
Agriculture and fishing	205	13.4	30.5	20.6	19.3	13.9	2.4
Construction	1526	19.3	24.7	18.9	13.4	20.2	3.6
Water supply; sewerage; waste management and remediation activities	106	12.9	31.7	16.8	20.5	15.7	2.4
Manufacture	2843	20.3	23.7	21.7	12.2	18.8	3.3
Food services	543	17.3	15.9	25	9.7	29.7	2.3
TURNOVER							
Up to 2 million euro	2511	19.7	22.8	19.1	13.5	21.9	3.1
2-10 million euro	1587	20.8	25.3	22.5	11.4	17.7	2.2
10-50 million euro	449	20.9	26.4	26.8	11.3	11.8	2.8
50 million euro and over	94	22.7	31.2	20	6.3	14.4	5.5
ANNUAL TURNOVER OVER THE PAST 2 YRS							
Increased	1461	19	26	21.9	9.8	20.1	3.2
Remained unchanged	1518	20.3	23.1	22	12.2	19.5	2.9
Decreased	2110	18.8	22.7	19.6	15.6	20.3	3
MATERIAL COST							
Less than 10%	485	22.4	23.2	19.3	14	20.2	1
Between 10% and 29%	1326	19.3	24.4	22.6	12.2	18.9	2.5
Between 30% and 49%	1628	19.9	25.2	19.7	11.9	20	3.3
50% or more	1236	19.6	24.5	21.2	15.8	17.2	1.7
ECO-INNOVATION							
Yes	2331	18.9	23.5	23.9	14.8	16	2.9
No	2891	19.5	23.8	18.8	11.1	23.4	3.5

Table 29a. Barriers to accelerated eco-innovation: Uncertain demand from the market – *by country*

QUESTION: Q7_h. I will list you some barriers that could represent an obstacle to accelerated eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very serious, somewhat serious, not serious or not at all serious barrier in case of your company? - Uncertain demand from the market

	Total N	% Not at all serious	% Not serious	% Somewhat serious	% Very serious	% Not applicable	% DK/NA
EU27	5222	11.2	14.4	33.1	33.5	5.8	2
COUNTRY							
Belgium	201	15.5	16.1	31.3	27.2	5.3	4.6
Bulgaria	204	7.9	8.9	30.7	45.7	4.3	2.4
Czech Rep.	200	5.1	29.2	36.1	27.2	0.5	1.9
Denmark	201	12.9	18.3	37.9	21.9	8.5	0.5
Germany	250	15.8	18.4	27.9	29.6	7.4	0.9
Estonia	200	21.5	10.3	33.1	28.3	6.2	0.6
Greece	201	8.4	8.6	33.1	46.4	1.1	2.4
Spain	250	5.5	10.3	20.5	61.6	1.7	0.4
France	250	14.1	14	45	20.7	5.6	0.7
Ireland	200	6.2	15.6	39.6	32.4	3.8	2.4
Italy	251	8	14.8	35.7	35.4	5.1	1
Cyprus	50	7.8	4.7	23.6	54.5	4.7	4.8
Latvia	202	28.7	12.2	23.2	28.2	5	2.8
Lithuania	202	5.3	16.4	31.7	32.2	3.5	11
Luxembourg	51	19.6	11.3	44.4	23.1	1.7	0
Hungary	202	12.4	3.2	16.3	55	11.2	1.9
Malta	50	9.9	7.2	24.3	54.8	3.8	0
Netherlands	200	10.2	18.5	24.6	28	16.2	2.5
Austria	200	12.8	15.9	36.6	26	6.5	2.2
Poland	200	10.3	10.7	41.4	34.8	1.7	1.1
Portugal	201	10	14.1	31.8	36.7	6.8	0.6
Romania	200	13.5	9.8	25.8	44.9	2.8	3.3
Slovenia	200	9.4	24.7	39.4	24.3	1.7	0.5
Slovakia	200	4.6	11.2	35.1	35.8	5.8	7.6
Finland	205	9.8	21.4	44.4	21.9	0.5	2.2
Sweden	200	23.6	19.1	32.6	16.1	3.4	5.3
United Kingdom	251	10.3	14.5	32.6	22.5	12.7	7.4

Table 29b. Barriers to accelerated eco-innovation: Uncertain demand from the market - *by segments*

QUESTION: Q7_h. I will list you some barriers that could represent an obstacle to accelerated eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very serious, somewhat serious, not serious or not at all serious barrier in case of your company? - Uncertain demand from the market

	Total N	% Not at all serious	% Not serious	% Somewhat serious	% Very serious	% Not applicable	% DK/NA
EU27	5222	11.2	14.4	33.1	33.5	5.8	2
COMPANY SIZE							
10–49 employees	4337	10.6	14.2	32.7	34.9	5.9	1.8
50+ employees	885	14.2	15.5	35.3	26.8	5.3	2.9
ACTIVITY							
Agriculture and fishing	205	7	13.2	38.2	32.9	6.4	2.3
Construction	1526	11.1	13.7	35.4	33.6	4.6	1.6
Water supply; sewerage; waste management and remediation activities	106	13.7	23.5	21.6	35.4	4	1.9
Manufacture	2843	11.3	14.4	31.8	34.6	5.7	2.1
Food services	543	11.7	15.1	33.6	27.8	9.5	2.4
TURNOVER							
Up to 2 million euro	2511	10.8	13.4	32	37.5	4.7	1.6
2-10 million euro	1587	11.6	15.5	34.5	31.6	5.6	1.2
10-50 million euro	449	11	20	34.1	29.1	4.4	1.4
50 million euro and over	94	20.6	13.1	24.7	31.4	4.6	5.6
ANNUAL TURNOVER OVER THE PAST 2 YRS							
Increased	1461	15.1	16.4	34.2	26.9	6.1	1.4
Remained unchanged	1518	10.9	14.7	37.8	29.4	5.5	1.7
Decreased	2110	8.5	12.9	29.6	41.8	5.3	2
MATERIAL COST							
Less than 10%	485	9.8	17.5	28.5	34.9	8.8	0.4
Between 10% and 29%	1326	13.7	14.5	34.7	30.7	4.6	1.8
Between 30% and 49%	1628	11.2	15.4	32.9	33.1	5.5	1.8
50% or more	1236	9.8	13.6	34.3	36.8	4.4	1
ECO-INNOVATION							
Yes	2331	10	13.2	36.1	35.5	3.8	1.4
No	2891	12.1	15.4	30.7	31.9	7.4	2.5

Table 30a. Barriers to accelerated eco-innovation: Reducing material use is not an innovation priority – *by country*

QUESTION: Q7_i. I will list you some barriers that could represent an obstacle to accelerated eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very serious, somewhat serious, not serious or not at all serious barrier in case of your company? - Reducing material use is not an innovation priority

	Total N	% Not at all serious	% Not serious	% Somewhat serious	% Very serious	% Not applicable	% DK/NA
EU27	5222	18.1	25	27.4	17.4	8.7	3.4
COUNTRY							
Belgium	201	15.9	19.6	21.2	22.6	12	8.6
Bulgaria	204	19	20.9	27.2	15.9	8.8	8.2
Czech Rep.	200	4.6	47.3	26.4	14.7	3.7	3.3
Denmark	201	29.1	27.4	19.4	11.6	9.5	3
Germany	250	17.4	30.7	23.9	18.6	7.4	2.1
Estonia	200	26.6	18.9	22.3	8.9	20.1	3.3
Greece	201	21.7	13.2	32.6	24.2	3.1	5.2
Spain	250	16.6	23	25.6	30.5	3.1	1.2
France	250	28.6	31.9	26.8	6	6.1	0.6
Ireland	200	12.9	24.8	36.3	18.7	4.9	2.3
Italy	251	15.8	26	29.6	20.4	6.7	1.5
Cyprus	50	12	11.1	26.8	41.6	5.1	3.5
Latvia	202	34.9	16.1	19.3	15.2	9.5	5
Lithuania	202	6.5	18.5	40.9	14.7	11.1	8.3
Luxembourg	51	16.4	17.7	33.8	25.2	4.3	2.6
Hungary	202	14.5	14.6	17	17.9	27.6	8.5
Malta	50	18.1	13.8	14.9	29.4	16.1	7.7
Netherlands	200	17	18.1	16.9	20.8	24.5	2.6
Austria	200	13.3	25	29.1	20.8	8.4	3.3
Poland	200	15.1	21.9	38.7	13.8	7.5	2.9
Portugal	201	11.1	18.6	22.7	28.2	17	2.4
Romania	200	19.6	18.2	31.2	16.6	7.4	6.9
Slovenia	200	16	29.1	33.1	11.2	6	4.7
Slovakia	200	6.4	25.7	34.7	15.4	7.2	10.6
Finland	205	20	31	25.8	12.5	7.1	3.7
Sweden	200	36.3	22.9	15.3	7.4	6.7	11.3
United Kingdom	251	16.4	17	29.9	14.9	13.5	8.2

Table 30b. Barriers to accelerated eco-innovation: Reducing material use is not an innovation priority - *by segments*

QUESTION: Q7_i. I will list you some barriers that could represent an obstacle to accelerated eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very serious, somewhat serious, not serious or not at all serious barrier in case of your company? - Reducing material use is not an innovation priority

	Total N	% Not at all serious	% Not serious	% Somewhat serious	% Very serious	% Not applicable	% DK/NA
EU27	5222	18.1	25	27.4	17.4	8.7	3.4
COMPANY SIZE							
10–49 employees	4337	17.2	25.2	27.5	17.7	9	3.3
50+ employees	885	22.3	24.1	27	16.1	6.7	3.8
ACTIVITY							
Agriculture and fishing	205	10.5	30.3	29.2	18.2	8.7	3.1
Construction	1526	16.2	25.4	30.9	14.2	9.8	3.5
Water supply; sewerage; waste management and remediation activities	106	20.9	26.2	26.2	17.4	5.3	4
Manufacture	2843	18.8	25	26	19.4	7.5	3.3
Food services	543	21.5	22.2	25	15.8	12.2	3.3
TURNOVER							
Up to 2 million euro	2511	16.5	25.7	29.3	17.3	8.1	3.1
2-10 million euro	1587	21.4	26.4	25.8	15.3	8.7	2.5
10-50 million euro	449	21.3	24.5	27	19.2	6.1	2
50 million euro and over	94	8.5	40.5	18.8	20.8	5.6	5.8
ANNUAL TURNOVER OVER THE PAST 2 YRS							
Increased	1461	18.3	25.9	28.4	17.1	7.6	2.7
Remained unchanged	1518	20.7	27.1	25.6	15.5	8.1	2.9
Decreased	2110	16.2	23.4	28.2	19.3	9.5	3.4
MATERIAL COST							
Less than 10%	485	20.1	26.1	26.8	15.2	11.1	0.8
Between 10% and 29%	1326	20.2	27	30.5	13.9	5.9	2.6
Between 30% and 49%	1628	16.7	23.7	29.5	19.6	8.1	2.3
50% or more	1236	16.7	27.5	25.1	20.3	7.1	3.3
ECO-INNOVATION							
Yes	2331	18	24.4	29	20.7	5.6	2.3
No	2891	18.1	25.5	26.2	14.8	11.1	4.2

Table 31a. Barriers to accelerated eco-innovation: Reducing energy use is not an innovation priority – *by country*

QUESTION: Q7_j. I will list you some barriers that could represent an obstacle to accelerated eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very serious, somewhat serious, not serious or not at all serious barrier in case of your company? - Reducing energy use is not an innovation priority

	Total N	% Not at all serious	% Not serious	% Somewhat serious	% Very serious	% Not applicable	% DK/NA
EU27	5222	15.2	21.3	28.7	25.5	6.4	2.9
COUNTRY							
Belgium	201	14.1	11.7	22.1	34	7.8	10.2
Bulgaria	204	14.9	26	25.6	22.1	4.7	6.6
Czech Rep.	200	7.2	44.6	28.4	14.2	3.3	2.2
Denmark	201	26.2	30	23.5	14	4.1	2.2
Germany	250	18.2	22.1	23.8	28.7	6.4	0.7
Estonia	200	26.6	14.6	25.2	14.5	13.7	5.3
Greece	201	20.9	8.8	27.1	39.8	1.7	1.7
Spain	250	10.5	16.4	27.3	43.1	2.1	0.6
France	250	24.6	25.7	35.2	8.3	4.6	1.6
Ireland	200	8.3	16.5	38.2	33.5	2.5	1
Italy	251	12.8	24.9	26.3	29	6	1
Cyprus	50	3.3	3.5	29.4	49.4	8.2	6.2
Latvia	202	28.1	12.5	20.7	25	10.4	3.3
Lithuania	202	5.2	13.4	38.7	31.2	7.9	3.6
Luxembourg	51	19.1	18.7	24.5	33.4	4.3	0
Hungary	202	13.2	11.4	25	16.5	22.9	11
Malta	50	18.2	9.9	20.3	39.5	9.9	2.2
Netherlands	200	6.6	15.4	21.9	39.3	13.9	3
Austria	200	14	14.8	35.8	28.8	3.7	3
Poland	200	12.7	20.1	41.1	15.7	5.2	5.2
Portugal	201	5.8	18.3	27.3	38.8	8.2	1.7
Romania	200	11.5	16	28.8	34.1	4.5	5.1
Slovenia	200	16.3	31	32.1	11.8	6.9	1.9
Slovakia	200	5.1	24.5	28.6	29.3	4.9	7.6
Finland	205	25.1	30.1	29.5	11.2	2.7	1.3
Sweden	200	38.2	21.1	15.1	10.4	6	9.2
United Kingdom	251	13.2	17.7	27.1	25.5	10.6	6

Table 31b. Barriers to accelerated eco-innovation: Reducing energy use is not an innovation priority - *by segments*

QUESTION: Q7_j. I will list you some barriers that could represent an obstacle to accelerated eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very serious, somewhat serious, not serious or not at all serious barrier in case of your company? - Reducing energy use is not an innovation priority

	Total N	% Not at all serious	% Not serious	% Somewhat serious	% Very serious	% Not applicable	% DK/NA
EU27	5222	15.2	21.3	28.7	25.5	6.4	2.9
COMPANY SIZE							
10–49 employees	4337	14.4	21.5	28.6	25.9	6.5	3
50+ employees	885	19.1	20.3	29.1	23.6	5.5	2.3
ACTIVITY							
Agriculture and fishing	205	11.1	24.5	23.6	30.5	8	2.4
Construction	1526	15	21.7	30.3	23.1	7.1	2.8
Water supply; sewerage; waste management and remediation activities	106	8.7	24.3	39.8	20.7	1.2	5.3
Manufacture	2843	16.3	21.6	26.4	26.6	6.2	3
Food services	543	13	16.9	35.9	25.8	5.8	2.6
TURNOVER							
Up to 2 million euro	2511	12.9	20.8	30.5	27.1	6.2	2.5
2-10 million euro	1587	18.3	24.2	25.2	24	5.4	2.8
10-50 million euro	449	21.5	20.5	25	26.4	4.3	2.3
50 million euro and over	94	15.5	22.4	33.3	20.9	4.8	3.1
ANNUAL TURNOVER OVER THE PAST 2 YRS							
Increased	1461	15.4	21.8	28.1	25.7	5.1	3.9
Remained unchanged	1518	14.6	24.1	30.9	22.3	6	2.1
Decreased	2110	15.9	19.2	28	27.5	7.2	2.3
MATERIAL COST							
Less than 10%	485	15.2	22.3	29.6	23.1	8.3	1.5
Between 10% and 29%	1326	15	23.2	30.8	24.3	4.8	1.8
Between 30% and 49%	1628	16.1	21.9	26.8	27.3	5.4	2.4
50% or more	1236	16.9	21.2	27.4	26.4	5.6	2.4
ECO-INNOVATION							
Yes	2331	14.7	20.2	28.1	31.3	3.8	2
No	2891	15.7	22.2	29.2	20.9	8.4	3.6

Table 32a. Barriers to accelerated eco-innovation: Technical and technological lock-ins in economy – *by country*

QUESTION: Q7_k. I will list you some barriers that could represent an obstacle to accelerated eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very serious, somewhat serious, not serious or not at all serious barrier in case of your company? - Technical and technological lock-ins in economy (e.g. old technical infrastructures)

	Total N	% Not at all serious	% Not serious	% Somewhat serious	% Very serious	% Not applicable	% DK/NA
EU27	5222	16.3	19.7	29.1	21.9	9.1	4
COUNTRY							
Belgium	201	17.3	21.8	23.6	22.3	10.4	4.6
Bulgaria	204	6	20.8	27.5	37.5	5.2	2.9
Czech Rep.	200	6.3	27.5	43	14.3	5.6	3.3
Denmark	201	26.8	33.1	20.9	4.7	6.7	7.9
Germany	250	17.8	26.2	27.9	14.6	10.6	2.9
Estonia	200	28.7	15.3	25.5	18.9	7.4	4.1
Greece	201	16.7	10.7	37.7	34.1	0.3	0.5
Spain	250	15.3	15.2	22.4	42	4	1.2
France	250	21.9	19.1	34.4	16.2	6.8	1.6
Ireland	200	14.7	23.8	35.5	11.8	7.7	6.5
Italy	251	17.5	20.8	28.6	23.3	7.4	2.3
Cyprus	50	3.9	7	30.4	38	11.7	9
Latvia	202	29.8	12.1	19	27.9	6.6	4.6
Lithuania	202	8.6	18.3	34.9	28.9	7.5	1.9
Luxembourg	51	8.4	10.5	40.5	34.4	2.6	3.6
Hungary	202	12.3	8.4	19.3	40.5	15.6	3.9
Malta	50	23.9	19.9	21.5	23.2	10.5	1.1
Netherlands	200	10.6	17.9	17.9	16.6	29.6	7.4
Austria	200	10.7	19.1	36.1	20.7	7.5	5.9
Poland	200	16.2	15.2	38.6	22.9	6	1.2
Portugal	201	10.8	18	29.6	26.8	13.6	1.2
Romania	200	14.6	14.6	26.9	30.5	8.2	5.3
Slovenia	200	13	25.4	36.7	20.8	2	2.1
Slovakia	200	5.2	24.7	32.6	16.2	9.3	12
Finland	205	13.5	32.1	35.8	12.7	1.6	4.3
Sweden	200	38	19	18.7	11.4	4.4	8.5
United Kingdom	251	11.2	19.2	24.9	11.8	17.2	15.6

Table 32b. Barriers to accelerated eco-innovation: Technical and technological lock-ins in economy - *by segments*

QUESTION: Q7_k. I will list you some barriers that could represent an obstacle to accelerated eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very serious, somewhat serious, not serious or not at all serious barrier in case of your company? - Technical and technological lock-ins in economy (e.g. old technical infrastructures)

	Total N	% Not at all serious	% Not serious	% Somewhat serious	% Very serious	% Not applicable	% DK/NA
EU27	5222	16.3	19.7	29.1	21.9	9.1	4
COMPANY SIZE							
10–49 employees	4337	16.7	19.1	28.6	21.8	9.7	4.2
50+ employees	885	14.1	22.6	31.6	22.7	6	3.1
ACTIVITY							
Agriculture and fishing	205	11	18.2	33.8	25.8	8.4	2.8
Construction	1526	15.5	19.9	29	21.1	10.1	4.4
Water supply; sewerage; waste management and remediation activities	106	18.5	23.2	35.6	20	2.5	0.2
Manufacture	2843	16.5	20.5	29.4	22.4	7.5	3.7
Food services	543	18.4	14.5	25.1	20.5	15.9	5.5
TURNOVER							
Up to 2 million euro	2511	16.9	18.7	30.3	22.9	7.8	3.5
2-10 million euro	1587	16.9	22	27.2	21	9.6	3.3
10-50 million euro	449	16.7	21.2	33.1	21.4	4.9	2.7
50 million euro and over	94	8.3	19.2	30.8	27	8.8	5.9
ANNUAL TURNOVER OVER THE PAST 2 YRS							
Increased	1461	16	21.2	29.8	18.8	10	4.2
Remained unchanged	1518	16.6	19.3	29.8	20.9	8.8	4.6
Decreased	2110	16.3	19.5	28.1	25.2	8.3	2.7
MATERIAL COST							
Less than 10%	485	15.6	20.4	30.1	18.7	12.8	2.4
Between 10% and 29%	1326	18.1	20.8	30.4	20.4	7	3.4
Between 30% and 49%	1628	16.2	19.8	30.4	22.7	8.4	2.6
50% or more	1236	15.2	22.2	27.3	25.2	7.5	2.6
ECO-INNOVATION							
Yes	2331	14.7	21	31	24.3	6.1	2.8
No	2891	17.5	18.6	27.6	20	11.5	4.9

Table 33a. Barriers to accelerated eco-innovation: Market dominated by established enterprises – *by country*

QUESTION: Q7_1. I will list you some barriers that could represent an obstacle to accelerated eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very serious, somewhat serious, not serious or not at all serious barrier in case of your company? - Market dominated by established enterprises

	Total N	% Not at all serious	% Not serious	% Somewhat serious	% Very serious	% Not applicable	% DK/NA
EU27	5222	16.9	22.6	28.9	21.4	7.5	2.7
COUNTRY							
Belgium	201	14.3	18.2	31	23.5	7.8	5.3
Bulgaria	204	12.5	20.2	34.7	28.9	3.1	0.5
Czech Rep.	200	6.9	45.8	28.6	15.2	1.5	1.9
Denmark	201	23.7	32.1	21.5	12.3	6.9	3.5
Germany	250	15.7	21.6	27.5	25.9	7.6	1.6
Estonia	200	36.1	14	22.9	19.2	5.5	2.3
Greece	201	14.2	18.2	33.8	29.8	2.8	1.1
Spain	250	13.4	20.2	23.6	40.5	1.5	0.8
France	250	22.7	28.7	29	8.3	10.4	0.9
Ireland	200	11.7	23.3	35.2	18.8	7.4	3.5
Italy	251	19.3	19.7	29.1	23	6.7	2.2
Cyprus	50	3.9	9.3	33.7	44.7	5.6	2.7
Latvia	202	37.7	11.4	20.8	18.3	8.8	2.9
Lithuania	202	8.1	22.9	35.7	23	6.3	3.9
Luxembourg	51	13.1	5.2	43.4	33	3.6	1.7
Hungary	202	19.2	13.5	20.8	26.3	16.3	3.9
Malta	50	27	14.9	13.2	33.3	11.5	0
Netherlands	200	12.6	23.2	19.6	20.1	22.4	2.1
Austria	200	13.9	16.2	35.9	26.1	6.1	1.7
Poland	200	11.8	24.4	38.4	21.3	3.5	0.6
Portugal	201	13	19	32.5	27.7	7.2	0.6
Romania	200	30.4	24.6	21.8	14	3.8	5.4
Slovenia	200	9.4	26	42	16.2	3	3.4
Slovakia	200	6.8	18.9	33.2	25.6	5.8	9.6
Finland	205	17.1	29.9	37.7	12.3	0.5	2.4
Sweden	200	27.5	26.7	23	11.2	5.6	6
United Kingdom	251	13.4	20.2	30.1	11.9	14.1	10.2

Table 33b. Barriers to accelerated eco-innovation: Market dominated by established enterprises - *by segments*

QUESTION: Q7_l. I will list you some barriers that could represent an obstacle to accelerated eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very serious, somewhat serious, not serious or not at all serious barrier in case of your company? - Market dominated by established enterprises

	Total N	% Not at all serious	% Not serious	% Somewhat serious	% Very serious	% Not applicable	% DK/NA
EU27	5222	16.9	22.6	28.9	21.4	7.5	2.7
COMPANY SIZE							
10–49 employees	4337	16.7	21.3	29.7	22.4	7.4	2.6
50+ employees	885	17.8	28.9	25.3	16.8	8.1	3.1
ACTIVITY							
Agriculture and fishing	205	9.2	29.5	28.9	23.9	7.5	0.9
Construction	1526	15.1	24	29.9	22.1	6.9	2.1
Water supply; sewerage; waste management and remediation activities	106	17.6	25.5	32.6	21.2	3.1	0
Manufacture	2843	18	21.4	29.3	21.9	6.3	3.2
Food services	543	18.9	21.8	23.7	16.3	16.2	3
TURNOVER							
Up to 2 million euro	2511	15.9	21.4	29.7	24	6.9	2.1
2-10 million euro	1587	18.3	23.6	27.1	21	7.9	2.1
10-50 million euro	449	21.7	28.4	26.1	16.6	5.3	1.8
50 million euro and over	94	16.6	28.5	26.9	17.3	4.5	6.2
ANNUAL TURNOVER OVER THE PAST 2 YRS							
Increased	1461	18	24.1	27.3	20.6	6.6	3.4
Remained unchanged	1518	18.2	23.3	29.9	19.8	6.9	1.9
Decreased	2110	14.9	21.6	28.8	24.1	8.3	2.3
MATERIAL COST							
Less than 10%	485	12.3	26.7	28.6	21.1	10.1	1.1
Between 10% and 29%	1326	19.1	21.9	29.5	20.5	6.6	2.5
Between 30% and 49%	1628	17	24	29.4	21.3	6.3	2
50% or more	1236	16.1	23	29.3	24.1	6	1.6
ECO-INNOVATION							
Yes	2331	17.1	22.5	29	24.1	5.1	2.2
No	2891	16.7	22.7	28.8	19.3	9.4	3.1

Table 34a. Barriers to accelerated eco-innovation: Existing regulations and structures not providing incentives to eco-innovate – *by country*

QUESTION: Q7_m. I will list you some barriers that could represent an obstacle to accelerated eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very serious, somewhat serious, not serious or not at all serious barrier in case of your company? - Existing regulations and structures not providing incentives to eco-innovate

	Total N	% Not at all serious	% Not serious	% Somewhat serious	% Very serious	% Not applicable	% DK/NA
EU27	5222	12.6	19.2	32.1	25	7.1	4
COUNTRY							
Belgium	201	14.8	16.7	29.6	19.3	10.9	8.7
Bulgaria	204	4.1	12.2	29.1	44.8	3.4	6.5
Czech Rep.	200	4.4	33.4	42.3	15.4	1.8	2.7
Denmark	201	14.9	29	27.4	13.3	9.1	6.2
Germany	250	12.9	30.2	32.3	17.7	5.2	1.7
Estonia	200	22.4	11.3	22.2	26.1	9.8	8.2
Greece	201	9	4.1	29	53.7	3.3	0.9
Spain	250	6.5	21.1	31.7	35	3.7	2
France	250	18.5	17.5	37.7	19	5.7	1.6
Ireland	200	7.8	18.9	37.3	27.5	3.8	4.7
Italy	251	14	17.3	30	29	6.3	3.3
Cyprus	50	7	6.7	25.5	46.3	6.2	8.3
Latvia	202	18.9	9.6	22.2	34.7	11.1	3.5
Lithuania	202	3.2	13	26.8	37.5	8.5	11
Luxembourg	51	23.4	6.9	45.3	21.7	2.6	0
Hungary	202	9.3	7.9	22.6	37.9	16.1	6.2
Malta	50	10.5	12.7	20.4	42.7	9.3	4.4
Netherlands	200	11.3	15.2	21.2	21.9	25.3	5.1
Austria	200	11.8	13.5	39.3	29.3	2.9	3.3
Poland	200	9.4	15.3	42.8	26.4	4.5	1.6
Portugal	201	12.2	18	35.2	24.5	9.2	0.9
Romania	200	12.2	7.4	25	40.8	6.1	8.6
Slovenia	200	7.9	21.8	44.4	20	3	2.9
Slovakia	200	5.4	21.1	33.7	20	6.5	13.3
Finland	205	17.3	20.5	37.3	22.3	1.1	1.4
Sweden	200	24.4	16.6	25	10	7.8	16.3
United Kingdom	251	14	20.8	24	16.8	14.6	9.7

Table 34b. Barriers to accelerated eco-innovation: Existing regulations and structures not providing incentives to eco-innovate - *by segments*

QUESTION: Q7_m. I will list you some barriers that could represent an obstacle to accelerated eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very serious, somewhat serious, not serious or not at all serious barrier in case of your company? - Existing regulations and structures not providing incentives to eco-innovate

	Total N	% Not at all serious	% Not serious	% Somewhat serious	% Very serious	% Not applicable	% DK/NA
EU27	5222	12.6	19.2	32.1	25	7.1	4
COMPANY SIZE							
10–49 employees	4337	11.8	17.8	32.8	25.9	7.4	4.3
50+ employees	885	16.2	25.7	28.9	20.9	5.7	2.6
ACTIVITY							
Agriculture and fishing	205	7.1	18.4	30.2	33.1	7.3	3.9
Construction	1526	8.9	19	34.4	25.6	8.1	3.9
Water supply; sewerage; waste management and remediation activities	106	14.7	19	28.2	28.6	7.6	1.9
Manufacture	2843	14.3	19.8	31	24.9	6.2	3.8
Food services	543	15.2	16.6	32.9	20.4	9	5.8
TURNOVER							
Up to 2 million euro	2511	10.8	17.4	35	25.8	7	3.9
2-10 million euro	1587	14.6	21.4	28.6	26.1	6.1	3.2
10-50 million euro	449	15.8	20.7	31.5	24.4	5	2.6
50 million euro and over	94	15.5	25.1	26.5	21.8	6.4	4.7
ANNUAL TURNOVER OVER THE PAST 2 YRS							
Increased	1461	13	19.7	35.2	22.4	6.9	2.8
Remained unchanged	1518	14	20.5	31.7	22.6	6.3	4.9
Decreased	2110	10.9	18.2	30.1	29.4	7.7	3.8
MATERIAL COST							
Less than 10%	485	12.3	20.1	36.6	19.6	8.3	3.1
Between 10% and 29%	1326	13.9	19.2	35	23.2	5	3.6
Between 30% and 49%	1628	12.6	21.3	31.9	24.8	7.2	2.3
50% or more	1236	12.1	16.8	29.8	31.9	5.3	4
ECO-INNOVATION							
Yes	2331	12.7	18.5	34	27.7	4.3	2.9
No	2891	12.5	19.7	30.6	22.9	9.4	4.8

Table 35a. Barriers to accelerated eco-innovation: Insufficient access to existing subsidies and fiscal incentives – *by country*

QUESTION: Q7_n. I will list you some barriers that could represent an obstacle to accelerated eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very serious, somewhat serious, not serious or not at all serious barrier in case of your company? - Insufficient access to existing subsidies and fiscal incentives

	Total N	% Not at all serious	% Not serious	% Somewhat serious	% Very serious	% Not applicable	% DK/NA
EU27	5222	11.7	16.5	30.1	30.1	8.2	3.3
COUNTRY							
Belgium	201	12.5	17.3	28.3	24.8	11.3	5.8
Bulgaria	204	7.3	11.7	22.2	52.9	3.9	2.1
Czech Rep.	200	6.1	42.4	32.3	12.3	4.2	2.7
Denmark	201	18.9	23.8	27.1	13.3	8.3	8.7
Germany	250	15.1	21.3	23.6	26.9	11.5	1.7
Estonia	200	25.7	12.8	23.1	26.4	8.4	3.5
Greece	201	8.5	8	26.1	55.8	1.2	0.4
Spain	250	5.9	13.7	25.2	51.7	2.3	1.2
France	250	13.2	13.6	41.9	23.6	5.6	2
Ireland	200	12.6	20.8	37.5	17.8	8	3.4
Italy	251	11.3	16.1	33.5	30.6	6.1	2.4
Cyprus	50	2	4.3	11.9	71	7.4	3.5
Latvia	202	17.8	10.3	19.6	40.2	11.3	0.8
Lithuania	202	3.5	7.5	31.4	36	13.1	8.6
Luxembourg	51	15.1	19.4	36.4	21.5	7.7	0
Hungary	202	10.3	6.9	22.7	44.8	11.3	3.9
Malta	50	6.6	2.2	19.4	56.4	13.2	2.2
Netherlands	200	10.5	15.8	19.3	28.4	22.6	3.4
Austria	200	7.9	15	34.2	38.4	3.9	0.6
Poland	200	11.8	19.4	38.2	26.2	3.8	0.6
Portugal	201	11.1	10.1	32.3	30.1	14.2	2.2
Romania	200	6.4	7.1	16.6	54.8	9.2	5.9
Slovenia	200	7.8	15.2	40.1	32	4.2	0.7
Slovakia	200	6.7	13.7	25.8	38.4	8.3	7.1
Finland	205	27.3	24.9	34.6	8.2	1.7	3.3
Sweden	200	26.4	16.8	28	11.2	6.4	11.2
United Kingdom	251	12.5	19	25.6	14.1	16.8	12

Table 35b. Barriers to accelerated eco-innovation: Insufficient access to existing subsidies and fiscal incentives - *by segments*

QUESTION: Q7_n. I will list you some barriers that could represent an obstacle to accelerated eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very serious, somewhat serious, not serious or not at all serious barrier in case of your company? - Insufficient access to existing subsidies and fiscal incentives

	Total N	% Not at all serious	% Not serious	% Somewhat serious	% Very serious	% Not applicable	% DK/NA
EU27	5222	11.7	16.5	30.1	30.1	8.2	3.3
COMPANY SIZE							
10–49 employees	4337	11.2	15.9	29.6	31.5	8.5	3.4
50+ employees	885	14.2	19.9	32.5	23.6	7	2.7
ACTIVITY							
Agriculture and fishing	205	6.7	14.6	36.6	35.1	6.1	1.1
Construction	1526	9.3	17.2	31.4	30.5	8.6	2.9
Water supply; sewerage; waste management and remediation activities	106	14.4	19.6	43.3	19.7	1.1	1.9
Manufacture	2843	13.2	17.7	27.8	30.3	7.8	3.3
Food services	543	12.2	8.9	33.5	28.7	11.3	5.5
TURNOVER							
Up to 2 million euro	2511	10.8	14.9	30.6	34.1	7.2	2.4
2-10 million euro	1587	14	18.3	28.8	27.9	7.8	3.2
10-50 million euro	449	13.5	23.9	31.9	23.6	6	1
50 million euro and over	94	10.6	20.4	35.6	20	7.1	6.4
ANNUAL TURNOVER OVER THE PAST 2 YRS							
Increased	1461	13.6	18.4	29.5	27.2	7.6	3.7
Remained unchanged	1518	11.9	16.6	32.1	27	8.6	3.8
Decreased	2110	10.4	15.3	29.1	35	8.1	2.1
MATERIAL COST							
Less than 10%	485	17	15.3	31.4	25.5	9.3	1.5
Between 10% and 29%	1326	12.5	16.9	32.8	28.4	6.7	2.8
Between 30% and 49%	1628	11.6	17.7	28.9	30.6	9	2.3
50% or more	1236	11.6	17.5	27	35.1	5.9	2.9
ECO-INNOVATION							
Yes	2331	11.6	16.1	30.8	34.1	5.1	2.3
No	2891	11.8	16.9	29.5	26.9	10.7	4.2

Table 36a. Drivers that could accelerate eco-innovation: Technological and management capabilities within the enterprise – *by country*

QUESTION: Q8_a. I will list you some drivers that could accelerate eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very important, somewhat important, not important or not at all important driver in case of your company? - Technological and management capabilities within the enterprise

	Total N	% Not at all important	% Not important	% Somewhat important	% Very important	% Not applicable	% DK/NA
EU27	5222	6.7	13.8	36.5	37.4	3.7	2
COUNTRY							
Belgium	201	6.1	12.7	30.2	43.9	5.4	1.7
Bulgaria	204	2.4	9	29.2	56.2	1.8	1.4
Czech Rep.	200	2.4	35.1	30.4	28	2.9	1.3
Denmark	201	5.6	18	42.5	27.7	2.8	3.4
Germany	250	4.6	9.2	38.3	45.4	2.5	0
Estonia	200	15.8	8.6	29.3	41.7	3.2	1.4
Greece	201	7.6	4.1	42.7	45.1	0	0.5
Spain	250	4.1	14.1	29.6	48.2	2.8	1.2
France	250	12.4	16.9	43.4	21.6	5.3	0.5
Ireland	200	4.7	12.3	44	35.8	2.3	1
Italy	251	6.1	19.3	34.6	37.5	0.4	2.1
Cyprus	50	6	1.6	30.6	57.2	4.7	0
Latvia	202	15.1	8.4	32.4	37.7	3.1	3.2
Lithuania	202	2.2	7	43.4	39.4	1.6	6.4
Luxembourg	51	3.2	1.7	29.2	64.3	1.7	0
Hungary	202	8.3	2.4	21.6	56.4	9.9	1.4
Malta	50	10.4	7.1	5.6	65.8	11.1	0
Netherlands	200	3.7	18.9	31.9	26.5	16.6	2.4
Austria	200	4.4	9.3	33.8	49.5	1.9	1.1
Poland	200	8.9	11.2	47.8	28	3.5	0.6
Portugal	201	3.2	9.4	31	51.1	4	1.2
Romania	200	2.4	2.4	25	62.6	1.9	5.7
Slovenia	200	3.3	11	37.7	47	0	1
Slovakia	200	3.5	22.1	33.3	30.7	3.4	7.1
Finland	205	4.8	15	51.4	27.9	0.9	0
Sweden	200	5.9	14.1	35.1	38.8	0.9	5.3
United Kingdom	251	9.9	12.7	38.9	23.7	7.6	7.2

Table 36b. Drivers that could accelerate eco-innovation: Technological and management capabilities within the enterprise - *by segments*

QUESTION: Q8_a. I will list you some drivers that could accelerate eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very important, somewhat important, not important or not at all important driver in case of your company? - Technological and management capabilities within the enterprise

	Total N	% Not at all important	% Not important	% Somewhat important	% Very important	% Not applicable	% DK/NA
EU27	5222	6.7	13.8	36.5	37.4	3.7	2
COMPANY SIZE							
10–49 employees	4337	6.7	13.8	36.5	37.2	3.8	2.1
50+ employees	885	6.5	13.5	36.8	38.3	3.4	1.5
ACTIVITY							
Agriculture and fishing	205	4.9	15.4	31.9	44.2	2.7	0.8
Construction	1526	6	13.5	39.4	35.1	3.9	2.1
Water supply; sewerage; waste management and remediation activities	106	3.9	23.1	34.6	37.2	0.9	0.2
Manufacture	2843	7.5	13.9	35.4	38.3	2.8	2
Food services	543	5.5	11.4	36.3	36.3	8.4	2
TURNOVER							
Up to 2 million euro	2511	7	12.7	34.6	40.4	3.6	1.7
2-10 million euro	1587	7.2	15.6	39.4	33.9	3.1	0.8
10-50 million euro	449	6.2	13.7	37.8	36.7	2.7	3
50 million euro and over	94	1.3	13.7	38.3	39.7	2.6	4.3
ANNUAL TURNOVER OVER THE PAST 2 YRS							
Increased	1461	5.6	12.2	38.5	39	3.2	1.5
Remained unchanged	1518	6.5	14.4	39	35.3	3.3	1.5
Decreased	2110	7.8	14.3	33.1	38.5	4	2.2
MATERIAL COST							
Less than 10%	485	8.9	17.7	31.7	35.7	5.1	0.9
Between 10% and 29%	1326	6.1	13.1	38.6	37.5	3.4	1.3
Between 30% and 49%	1628	6.6	14.2	34.9	40.4	2.3	1.6
50% or more	1236	7.2	12.9	39.6	35.8	2.6	2
ECO-INNOVATION							
Yes	2331	4.8	12.1	36	43.8	1.7	1.5
No	2891	8.2	15.1	36.9	32.2	5.3	2.4

Table 37a. Drivers that could accelerate eco-innovation: Secure or increase existing market share – *by country*

QUESTION: Q8_b. I will list you some drivers that could accelerate eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very important, somewhat important, not important or not at all important driver in case of your company? - Secure or increase existing market share

	Total N	% Not at all important	% Not important	% Somewhat important	% Very important	% Not applicable	% DK/NA
EU27	5222	5.7	12.3	34.1	41.7	3.7	2.4
COUNTRY							
Belgium	201	4.9	13.3	33.6	38.4	4.6	5.1
Bulgaria	204	1.9	9.3	28	54.2	3.6	3
Czech Rep.	200	3.8	32.4	35.5	25.6	0.9	1.8
Denmark	201	7.4	15.6	33.9	38.9	3.1	1
Germany	250	6.2	11.4	29.9	46.1	5.6	0.8
Estonia	200	8.9	7.1	23.4	50.9	6.2	3.6
Greece	201	1.1	5.2	30.8	60.4	0.8	1.6
Spain	250	5.8	9.4	32.2	48.5	1.7	2.4
France	250	7.9	19.5	42.3	23.8	5.6	0.9
Ireland	200	3.1	9.2	31.9	51.8	2.3	1.7
Italy	251	6.4	16.9	33.8	39.7	0.9	2.4
Cyprus	50	3.3	6.2	31.2	54.6	2	2.7
Latvia	202	10.3	7.7	28.9	46.6	3.6	2.8
Lithuania	202	1.1	5.1	30.4	59.6	1.3	2.7
Luxembourg	51	4.5	4.3	30.2	58.4	2.6	0
Hungary	202	4.7	5.6	16.6	59.5	8.5	5.1
Malta	50	4.9	3.3	14.9	64.6	12.2	0
Netherlands	200	5	9.9	24.3	46.8	12.2	1.9
Austria	200	3.2	11.1	31.4	48.3	2.2	3.7
Poland	200	5.9	6.7	47.4	35.1	3.1	1.9
Portugal	201	3.6	7.7	25.4	60	3.2	0.1
Romania	200	1	1.7	24.7	66.3	1.2	5
Slovenia	200	3.8	8.6	38	47.9	0.3	1.4
Slovakia	200	4.2	8.5	31.9	44.5	4.5	6.5
Finland	205	6.2	10	41.5	41.7	0	0.6
Sweden	200	4.5	14.3	34.9	36.6	1.8	8
United Kingdom	251	6.7	8.7	37.2	37.1	5.9	4.3

Table 37b. Drivers that could accelerate eco-innovation: Secure or increase existing market share - *by segments*

QUESTION: Q8_b. I will list you some drivers that could accelerate eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very important, somewhat important, not important or not at all important driver in case of your company? - Secure or increase existing market share

	Total N	% Not at all important	% Not important	% Somewhat important	% Very important	% Not applicable	% DK/NA
EU27	5222	5.7	12.3	34.1	41.7	3.7	2.4
COMPANY SIZE							
10–49 employees	4337	5.6	12.3	34.3	41.4	4	2.4
50+ employees	885	6.5	12.1	33.3	43.4	2.5	2.2
ACTIVITY							
Agriculture and fishing	205	2.8	10.9	34.1	46.8	3.7	1.8
Construction	1526	5.4	14.4	34.6	38.6	4	3.1
Water supply; sewerage; waste management and remediation activities	106	5.2	22.3	35.3	30.9	5.2	1.1
Manufacture	2843	6.4	10.7	33.6	44.1	2.9	2.3
Food services	543	4.8	12.9	35.4	38.5	7.2	1.3
TURNOVER							
Up to 2 million euro	2511	5.6	12.3	34.8	41.6	4.1	1.6
2-10 million euro	1587	6.7	11.8	34	42.1	3.4	2.1
10-50 million euro	449	5.5	9.3	38.2	43.6	1.7	1.8
50 million euro and over	94	6.1	17.1	13.9	56.1	3.2	3.7
ANNUAL TURNOVER OVER THE PAST 2 YRS							
Increased	1461	4.4	12.8	35.4	42.2	3.4	1.8
Remained unchanged	1518	5.2	13	36.5	39.4	3.6	2.3
Decreased	2110	7.1	11.3	31.6	43.8	3.9	2.3
MATERIAL COST							
Less than 10%	485	6.7	16.3	34.5	33.9	7.4	1.3
Between 10% and 29%	1326	6.2	14	34.5	39.2	3.7	2.5
Between 30% and 49%	1628	5.9	12.8	33.8	43.2	3	1.2
50% or more	1236	5	9.8	35.2	46.2	2	1.9
ECO-INNOVATION							
Yes	2331	4	9.6	34.3	48.8	1.8	1.6
No	2891	7.2	14.4	34	36.1	5.3	3

Table 38a. Drivers that could accelerate eco-innovation: Current high material price – *by country*

QUESTION: Q8_c. I will list you some drivers that could accelerate eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very important, somewhat important, not important or not at all important driver in case of your company? - Current high material prices (as an incentive to innovate, to use less material and decrease the cost)

	Total N	% Not at all important	% Not important	% Somewhat important	% Very important	% Not applicable	% DK/NA
EU27	5222	7	10.8	31	44.8	5	1.5
COUNTRY							
Belgium	201	4.8	6.9	24.9	56.2	4.7	2.4
Bulgaria	204	3.9	3.5	27.8	59	2.2	3.5
Czech Rep.	200	3.8	35.2	29.1	29.7	1	1.3
Denmark	201	8.8	15.4	37.6	32.4	5.3	0.5
Germany	250	7.2	16.7	31.6	36.9	7.5	0
Estonia	200	8.1	6	26.5	44.3	13.6	1.4
Greece	201	3.6	1.9	26.5	64.4	2.5	1.1
Spain	250	5.5	7.5	17.7	67.2	1.7	0.4
France	250	12.1	8.5	40.5	32.7	5	1.1
Ireland	200	2.9	9.5	34.2	46.7	4.6	2.1
Italy	251	7.6	12.9	37	38.9	2.6	1.1
Cyprus	50	1.4	2	11.5	76.3	3.5	5.4
Latvia	202	10.4	7.5	18.3	56.8	6.1	0.9
Lithuania	202	0.8	5.9	27.5	60.3	2.6	3
Luxembourg	51	12.8	5.3	28.8	50.5	2.6	0
Hungary	202	6.9	5.3	15.6	47.5	22	2.7
Malta	50	8.8	2.2	10.4	72.5	6.1	0
Netherlands	200	4.4	16.4	27.8	38.2	10.5	2.8
Austria	200	5.7	15.6	25.2	47.1	4.8	1.6
Poland	200	8.5	8.4	38.4	42.4	2.3	0
Portugal	201	5.2	4.3	18.6	66.5	5.4	0.1
Romania	200	3.2	2.3	17.9	69.4	2.4	4.9
Slovenia	200	2.4	9.7	36	48	1.4	2.4
Slovakia	200	6.1	11	23.1	48.1	5.1	6.6
Finland	205	6.5	16.7	36.6	34.7	2.5	2.9
Sweden	200	7.4	16.8	31.7	32.2	5.4	6.5
United Kingdom	251	3.8	5.5	32.5	46.6	8.3	3.3

Table 38b. Drivers that could accelerate eco-innovation: Current high material price - *by segments*

QUESTION: Q8_c. I will list you some drivers that could accelerate eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very important, somewhat important, not important or not at all important driver in case of your company? - Current high material prices (as an incentive to innovate, to use less material and decrease the cost)

	Total N	% Not at all important	% Not important	% Somewhat important	% Very important	% Not applicable	% DK/NA
EU27	5222	7	10.8	31	44.8	5	1.5
COMPANY SIZE							
10–49 employees	4337	6.4	11.4	30.7	44.7	5.3	1.5
50+ employees	885	9.9	7.9	32	45.2	3.7	1.4
ACTIVITY							
Agriculture and fishing	205	4.2	8.3	29.6	52.1	4.6	1.2
Construction	1526	6.9	11.5	30	44.6	5.3	1.6
Water supply; sewerage; waste management and remediation activities	106	4.5	13.3	44.9	36	1.3	0.1
Manufacture	2843	6.9	10.8	31.2	44.5	5	1.5
Food services	543	9.1	9.2	30	45.4	5.3	1.1
TURNOVER							
Up to 2 million euro	2511	5.9	10.5	29.9	47.3	5.4	0.9
2-10 million euro	1587	9.3	13.3	30.2	41	4.7	1.5
10-50 million euro	449	6.5	7.9	32.6	47	4.1	1.8
50 million euro and over	94	7.2	2.2	50.3	38.7	0.7	1
ANNUAL TURNOVER OVER THE PAST 2 YRS							
Increased	1461	8.2	10.5	32	43.4	4.8	1.1
Remained unchanged	1518	6.1	13	33.7	40.2	5.7	1.2
Decreased	2110	6.5	9.3	28.2	50	4.5	1.5
MATERIAL COST							
Less than 10%	485	8.7	8.8	34	40	8.4	0.2
Between 10% and 29%	1326	7.1	12.7	33.3	42.5	2.8	1.7
Between 30% and 49%	1628	6.6	12.1	28.2	46.7	5.2	1.2
50% or more	1236	7.1	9.2	30.9	48.2	3.8	0.6
ECO-INNOVATION							
Yes	2331	6.2	9.1	30.3	50.8	2.8	0.8
No	2891	7.6	12.1	31.5	39.9	6.8	2

Table 39a. Drivers that could accelerate eco-innovation: Limited access to materials – *by country*

QUESTION: Q8_d. I will list you some drivers that could accelerate eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very important, somewhat important, not important or not at all important driver in case of your company? - Limited access to materials

	Total N	% Not at all important	% Not important	% Somewhat important	% Very important	% Not applicable	% DK/NA
EU27	5222	11.5	19.4	30.7	30.4	5.7	2.3
COUNTRY							
Belgium	201	11	22.6	30.2	23.2	9.3	3.6
Bulgaria	204	13.8	19.8	28.6	31.3	4.6	1.8
Czech Rep.	200	6.1	60.4	13.4	16.8	1.5	1.8
Denmark	201	15.5	28.2	25.8	19.4	7.5	3.6
Germany	250	13.9	20.6	26.2	33.3	5	1
Estonia	200	24.3	14.2	25.3	26.4	8.4	1.4
Greece	201	12	8.9	33.6	42.9	1.9	0.7
Spain	250	8.6	16.2	22.7	49.2	2.1	1.2
France	250	9.3	15.4	45.4	21.4	7.2	1.3
Ireland	200	5.6	14.4	38.1	37.1	3.3	1.5
Italy	251	13.2	21.7	30.6	28.6	2.4	3.5
Cyprus	50	16	19	24.6	28	7	5.4
Latvia	202	32.5	15	16.2	28.3	6.3	1.6
Lithuania	202	7.5	26.6	35	23.6	3.7	3.6
Luxembourg	51	4.1	15.1	28.3	43.9	6.9	1.7
Hungary	202	12.9	13.4	24.1	26.8	19.3	3.6
Malta	50	16.7	14.9	10.5	48	10	0
Netherlands	200	8.3	24.7	24.8	18	20.9	3.4
Austria	200	11.3	16.4	37.7	28.7	4.7	1.1
Poland	200	16	22.2	36.1	21	4.1	0.6
Portugal	201	8.2	10.4	22.1	52.6	6.2	0.6
Romania	200	4.8	7.9	30.5	46.2	4.5	6
Slovenia	200	5	26.3	33.8	33.6	0.3	1
Slovakia	200	6.6	22.9	29.5	25.6	8.6	6.8
Finland	205	19.9	32	28.3	11.3	2.6	5.9
Sweden	200	16.8	21.3	24.6	26.8	5.6	4.9
United Kingdom	251	9	13.7	34	31.4	8.4	3.5

Table 39b. Drivers that could accelerate eco-innovation: Limited access to materials - *by segments*

QUESTION: Q8_d. I will list you some drivers that could accelerate eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very important, somewhat important, not important or not at all important driver in case of your company? - Limited access to materials

	Total N	% Not at all important	% Not important	% Somewhat important	% Very important	% Not applicable	% DK/NA
EU27	5222	11.5	19.4	30.7	30.4	5.7	2.3
COMPANY SIZE							
10–49 employees	4337	11.6	19.4	30.8	30.2	5.8	2.3
50+ employees	885	11	19.7	30.6	31.3	5.1	2.3
ACTIVITY							
Agriculture and fishing	205	11.6	23.2	31.9	24.1	7.7	1.4
Construction	1526	11.7	20	30.9	28.7	5.9	2.8
Water supply; sewerage; waste management and remediation activities	106	12.9	33	35	16.1	2.7	0.3
Manufacture	2843	12.1	19.5	29	31.9	5.2	2.2
Food services	543	7	13.3	38	32.5	7.4	1.8
TURNOVER							
Up to 2 million euro	2511	11.5	19	30.4	31.5	5.9	1.7
2-10 million euro	1587	13.4	20.8	31.1	27.8	5.1	1.7
10-50 million euro	449	9	16.9	30	35.6	5.2	3.3
50 million euro and over	94	2.1	25.2	35.2	25.5	8.2	3.8
ANNUAL TURNOVER OVER THE PAST 2 YRS							
Increased	1461	10	18.3	32.3	31.4	5.8	2.1
Remained unchanged	1518	10.3	23.2	31.6	27.9	4.9	2.2
Decreased	2110	13.6	17.5	28.8	32	5.9	2.2
MATERIAL COST							
Less than 10%	485	14.9	23	30.2	23	8.3	0.5
Between 10% and 29%	1326	13.7	18	33.4	29.2	4	1.7
Between 30% and 49%	1628	10.3	19.6	31.5	31.3	5.5	1.8
50% or more	1236	9.8	21.2	29.1	33.7	3.8	2.4
ECO-INNOVATION							
Yes	2331	11.2	17.2	31.4	34.5	4.2	1.6
No	2891	11.7	21.3	30.2	27.1	6.9	2.9

Table 40a. Drivers that could accelerate eco-innovation: Expected future material scarcity – *by country*

QUESTION: Q8_e. I will list you some drivers that could accelerate eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very important, somewhat important, not important or not at all important driver in case of your company? - Expected future material scarcity (as an incentive to develop innovative, less material-intensive substitutes)

	Total N	% Not at all important	% Not important	% Somewhat important	% Very important	% Not applicable	% DK/NA
EU27	5222	10.3	16	28.9	35.3	6.9	2.6
COUNTRY							
Belgium	201	7.2	15.4	27.2	39.8	8.1	2.3
Bulgaria	204	12.4	16	25.3	40.3	3.5	2.4
Czech Rep.	200	6.8	52.1	22.7	16.1	1.5	0.8
Denmark	201	17.3	35.8	23.6	17.7	5.1	0.5
Germany	250	11.5	15.1	20.9	39.2	12.6	0.8
Estonia	200	17.9	7.6	25.2	27.2	15.1	7
Greece	201	8.1	5.7	29.1	53.5	2.4	1.2
Spain	250	8.4	14.1	28.2	46.3	0.9	2.1
France	250	12.5	12	38.6	32	4.4	0.5
Ireland	200	5.6	11.3	37.3	35.5	6.4	3.8
Italy	251	9.5	18.7	29.2	35.8	5.1	1.7
Cyprus	50	12.6	7.8	21.4	46.1	7.8	4.3
Latvia	202	26.9	13	22.2	27.9	6	3.9
Lithuania	202	5.9	25.7	26.1	31.8	4.6	5.9
Luxembourg	51	4.1	11.5	29.4	50.9	4.1	0
Hungary	202	9.2	8.9	21.9	25.2	27.4	7.4
Malta	50	10.4	8.4	13.3	55.7	12.2	0
Netherlands	200	7.6	18.9	23	34.2	14.5	1.9
Austria	200	6.1	10.8	25.2	51	5.3	1.6
Poland	200	14.2	18.8	37.2	24.5	4.3	1
Portugal	201	5.7	9.5	21.9	54.4	6.8	1.6
Romania	200	4.1	4.7	28.8	50.3	3.5	8.6
Slovenia	200	5.9	23.9	33.8	32.8	0.9	2.6
Slovakia	200	8.5	24.1	26.8	24.7	8	8
Finland	205	18.4	23.2	35.4	15.6	3.8	3.6
Sweden	200	14.6	21	23.9	25.5	3.9	11.1
United Kingdom	251	9	11.5	31.3	29.7	11.2	7.4

Table 40b. Drivers that could accelerate eco-innovation: Expected future material scarcity - *by segments*

QUESTION: Q8_e. I will list you some drivers that could accelerate eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very important, somewhat important, not important or not at all important driver in case of your company? - Expected future material scarcity (as an incentive to develop innovative, less-material intensive substitutes)

	Total N	% Not at all important	% Not important	% Somewhat important	% Very important	% Not applicable	% DK/NA
EU27	5222	10.3	16	28.9	35.3	6.9	2.6
COMPANY SIZE							
10–49 employees	4337	10.3	15.7	29.6	34.4	7.3	2.7
50+ employees	885	9.9	17.2	25.4	39.9	5.3	2.2
ACTIVITY							
Agriculture and fishing	205	7.7	20.1	28.7	33	8.2	2.4
Construction	1526	10	16.7	30.9	33.8	5.7	3
Water supply; sewerage; waste management and remediation activities	106	13.3	24.3	28.5	29.9	1	3
Manufacture	2843	10.5	16	26.7	37.1	7.3	2.4
Food services	543	10.3	10.8	34.3	32.5	9	3.2
TURNOVER							
Up to 2 million euro	2511	10.5	15.6	29.4	34.9	6.8	2.7
2-10 million euro	1587	10.9	18.4	27.4	34.7	7.3	1.4
10-50 million euro	449	9.7	9.5	29.9	41.5	6.2	3.2
50 million euro and over	94	4.3	15.7	29	44.4	2.5	4
ANNUAL TURNOVER OVER THE PAST 2 YRS							
Increased	1461	9.2	16.4	27.2	37.8	7.3	2.1
Remained unchanged	1518	10.7	16.7	31.7	32.3	6.4	2.2
Decreased	2110	11	14.8	28	36.4	6.9	2.9
MATERIAL COST							
Less than 10%	485	13.7	14.7	28.4	34.9	7.8	0.5
Between 10% and 29%	1326	11.9	15	32	34.3	4.8	2.1
Between 30% and 49%	1628	8	18.1	27.6	35.5	8.1	2.6
50% or more	1236	10.9	16.1	29.5	36.2	5.3	2
ECO-INNOVATION							
Yes	2331	9	14.8	29.9	39.8	4.5	2
No	2891	11.3	17	28	31.7	8.9	3.2

Table 41a. Drivers that could accelerate eco-innovation: Collaboration with research institutes, agencies and universities – *by country*

QUESTION: Q8_f. I will list you some drivers that could accelerate eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very important, somewhat important, not important or not at all important driver in case of your company? - Collaboration with research institutes, agencies and universities

	Total N	% Not at all important	% Not important	% Somewhat important	% Very important	% Not applicable	% DK/NA
EU27	5222	13.9	20.8	29.6	19.2	14.2	2.3
COUNTRY							
Belgium	201	10.3	21.1	25.4	24.8	13.7	4.8
Bulgaria	204	10.9	19.1	34.6	31.6	2.8	1
Czech Rep.	200	10.8	50.8	16.2	12.7	8.4	1.1
Denmark	201	18.7	31	30.1	10.4	8.3	1.4
Germany	250	16.2	23.1	31.3	14.6	14.3	0.4
Estonia	200	18.7	15.9	29.6	17.9	14.7	3.2
Greece	201	7.8	10.7	39.7	40.3	1.5	0
Spain	250	14.3	17.2	26.7	31.7	9.2	0.8
France	250	18.7	18	36.9	7.3	18	1.1
Ireland	200	12.9	21.7	39.7	18.3	5.6	1.9
Italy	251	10	20.2	28.6	26	11.9	3.3
Cyprus	50	10.9	14.6	22.5	30.7	15.8	5.4
Latvia	202	17.1	9.3	25.4	21.3	24.5	2.3
Lithuania	202	10.1	17.8	33.8	17.7	17.2	3.5
Luxembourg	51	18	9.4	18.2	38.2	16.3	0
Hungary	202	13.2	8.1	17	15.2	44.6	1.9
Malta	50	6.6	8.8	8.8	16.4	53.3	6.1
Netherlands	200	8.2	26.3	21.5	18.5	22.5	2.9
Austria	200	10.6	18.5	40.8	21.8	6.1	2.2
Poland	200	17	27.2	32.2	13.3	7.9	2.3
Portugal	201	9.1	15.6	27.6	28.1	18.6	1
Romania	200	8.7	11.2	34	28.5	10.4	7.2
Slovenia	200	8.9	23	40.1	20.8	4.3	2.9
Slovakia	200	7.6	27.6	27.6	20.7	10.2	6.3
Finland	205	12	27.4	39.6	13.2	4.6	3.2
Sweden	200	17.8	24.3	26	13.1	12.8	6
United Kingdom	251	16.1	18.6	22.4	16.8	21.7	4.3

Table 41b. Drivers that could accelerate eco-innovation: Collaboration with research institutes, agencies and universities - *by segments*

QUESTION: Q8_f. I will list you some drivers that could accelerate eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very important, somewhat important, not important or not at all important driver in case of your company? - Collaboration with research institutes, agencies and universities

	Total N	% Not at all important	% Not important	% Somewhat important	% Very important	% Not applicable	% DK/NA
EU27	5222	13.9	20.8	29.6	19.2	14.2	2.3
COMPANY SIZE							
10–49 employees	4337	14.5	20.5	27.8	19.3	15.5	2.4
50+ employees	885	10.8	22.5	38.2	18.6	7.9	2
ACTIVITY							
Agriculture and fishing	205	8.2	15.7	35.2	28.7	11.3	0.9
Construction	1526	14.9	21.8	27.1	19.1	14.7	2.3
Water supply; sewerage; waste management and remediation activities	106	6.1	31.9	36.5	13.5	11.8	0.2
Manufacture	2843	13.7	21.7	29.7	19.9	12.4	2.6
Food services	543	15.3	13.1	32.4	13.4	24.2	1.6
TURNOVER							
Up to 2 million euro	2511	15.4	19.9	26.9	19.3	16.3	2.1
2-10 million euro	1587	13.5	22.4	31.7	18.3	12.6	1.6
10-50 million euro	449	12.2	24	38	16	6.4	3.4
50 million euro and over	94	11.6	20.8	33.6	22.1	7.7	4.2
ANNUAL TURNOVER OVER THE PAST 2 YRS							
Increased	1461	13.3	21	32.7	17.8	13.1	2.1
Remained unchanged	1518	13.6	21.2	31	16.5	15.9	1.9
Decreased	2110	14.6	20.7	26.2	22.4	13.4	2.6
MATERIAL COST							
Less than 10%	485	18.7	21.9	25	17.4	16.8	0.3
Between 10% and 29%	1326	14.2	22.2	29	18.8	14.1	1.8
Between 30% and 49%	1628	12.9	21.3	30.5	20.4	12.8	2.1
50% or more	1236	13.5	21.4	31.9	20.4	10.5	2.2
ECO-INNOVATION							
Yes	2331	13.2	18.9	32.9	22.9	10.5	1.7
No	2891	14.4	22.4	26.9	16.2	17.3	2.8

Table 42a. Drivers that could accelerate eco-innovation: Good access to external information and knowledge – *by country*

QUESTION: Q8_g. I will list you some drivers that could accelerate eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very important, somewhat important, not important or not at all important driver in case of your company? - Good access to external information and knowledge, including technology support services

	Total N	% Not at all important	% Not important	% Somewhat important	% Very important	% Not applicable	% DK/NA
EU27	5222	6.3	13.6	40	34.1	4.2	1.9
COUNTRY							
Belgium	201	6	15.2	32.4	36.8	5.5	4.2
Bulgaria	204	4	9.7	31.4	51.9	1.5	1.6
Czech Rep.	200	4.3	38.3	32.5	23.1	0.5	1.3
Denmark	201	9.7	20.5	43.8	19.7	5	1.4
Germany	250	8.2	14.4	40.3	32.8	4.3	0
Estonia	200	9.5	14.5	37.7	31.2	5.6	1.6
Greece	201	6.2	5.2	35.8	51.7	0	1.1
Spain	250	5	13	33.4	42.7	3.6	2.3
France	250	7.5	11.4	55.4	19.7	4.9	1.1
Ireland	200	3.7	9.1	43.4	40.7	2.5	0.8
Italy	251	6.8	16.3	38.8	35.1	1.3	1.7
Cyprus	50	12.2	8.2	20.6	51.6	4.7	2.7
Latvia	202	15.7	7.2	33.7	38.3	3.7	1.4
Lithuania	202	3.5	9.7	45.3	37.6	1.6	2.3
Luxembourg	51	6.9	4.5	31.7	50.9	4.3	1.7
Hungary	202	3.8	5	16.6	60.7	11.7	2.3
Malta	50	3.3	6	18.6	58.8	11.1	2.2
Netherlands	200	3.2	19.9	26.4	32.4	15.7	2.4
Austria	200	4.4	6.3	36	48.5	3.2	1.6
Poland	200	5.3	15	50.5	24.7	3.4	1.1
Portugal	201	3.4	9.9	37.3	42.7	6	0.8
Romania	200	3.6	1.7	27.3	58.8	3.1	5.5
Slovenia	200	3.5	7.2	49.8	37.1	0.5	1.9
Slovakia	200	3.1	19.5	29.5	38.1	4	5.8
Finland	205	10.2	20	44.8	23.5	1.1	0.5
Sweden	200	4.3	19.3	42.4	25.2	2.5	6.4
United Kingdom	251	8.2	9.7	39.5	31.7	7.1	3.7

Table 42b. Drivers that could accelerate eco-innovation: Good access to external information and knowledge - *by segments*

QUESTION: Q8_g. I will list you some drivers that could accelerate eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very important, somewhat important, not important or not at all important driver in case of your company? - Good access to external information and knowledge, including technology support services

	Total N	% Not at all important	% Not important	% Somewhat important	% Very important	% Not applicable	% DK/NA
EU27	5222	6.3	13.6	40	34.1	4.2	1.9
COMPANY SIZE							
10–49 employees	4337	6.4	13.4	39.3	34.6	4.4	1.9
50+ employees	885	5.7	14.5	43.1	31.8	3.3	1.6
ACTIVITY							
Agriculture and fishing	205	3.8	12.3	42.8	37.6	2.8	0.6
Construction	1526	5.2	14.5	38.9	34.9	4.3	2.3
Water supply; sewerage; waste management and remediation activities	106	7.6	12	55.5	24.4	0.4	0.1
Manufacture	2843	7.5	14.6	37.9	34.4	3.8	1.7
Food services	543	3.8	6	49.8	30.8	7.6	2
TURNOVER							
Up to 2 million euro	2511	6.6	12.2	39.2	36.6	4.3	1.1
2-10 million euro	1587	7.5	17	38.9	30.9	4	1.7
10-50 million euro	449	5	11.9	44.9	31.5	3.5	3.2
50 million euro and over	94	0.9	7	45.1	40.7	4.2	2.1
ANNUAL TURNOVER OVER THE PAST 2 YRS							
Increased	1461	4.8	13.8	42.7	33.2	4	1.5
Remained unchanged	1518	5.4	14.1	44.4	30.9	3.6	1.5
Decreased	2110	8.1	13.2	35	37.3	4.5	2
MATERIAL COST							
Less than 10%	485	6.3	15.7	43.3	29.7	4.5	0.4
Between 10% and 29%	1326	6.6	13.3	41.3	32.3	4.2	2.3
Between 30% and 49%	1628	7.3	14.5	38	35.8	3.1	1.3
50% or more	1236	5.6	13.1	41.2	36.7	2.2	1.2
ECO-INNOVATION							
Yes	2331	4.7	12.5	40.2	39.6	2	1.1
No	2891	7.5	14.4	39.8	29.7	6.1	2.5

Table 43a. Drivers that could accelerate eco-innovation: Good business partners – *by country*

QUESTION: Q8_h. I will list you some drivers that could accelerate eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very important, somewhat important, not important or not at all important driver in case of your company? - Good business partners

	Total N	% Not at all important	% Not important	% Somewhat important	% Very important	% Not applicable	% DK/NA
EU27	5222	7.5	11.4	30.9	44.7	4.1	1.4
COUNTRY							
Belgium	201	5.2	11.3	27.3	49.5	5.1	1.6
Bulgaria	204	0.8	4.8	23.5	69.3	0.5	1
Czech Rep.	200	1.4	26.1	32.4	38.7	0.5	0.8
Denmark	201	6.1	9.8	46.9	32.6	3.6	0.9
Germany	250	3.4	6.6	19.6	68.4	2.1	0
Estonia	200	4.6	7.3	26.7	57.7	2.2	1.4
Greece	201	5	2.3	29.9	61.6	1.1	0
Spain	250	16.2	18.9	24.6	34.5	5	0.8
France	250	10.6	11	49.4	23.6	4.5	0.9
Ireland	200	5.3	17.2	32	38.2	5.2	2.1
Italy	251	10.7	17.1	35.1	33.5	2	1.5
Cyprus	50	4.1	6.2	16.2	69.3	1.6	2.7
Latvia	202	11	2.9	23.9	60.8	1.2	0.3
Lithuania	202	1.6	3.7	35.7	55.9	1.3	1.7
Luxembourg	51	4.6	0	14.6	79.2	0	1.7
Hungary	202	4.4	4.7	11.1	66.2	11.7	1.9
Malta	50	11	3.3	9.3	26.6	46	3.8
Netherlands	200	2.6	14.5	27.4	36.5	15.5	3.5
Austria	200	3.2	3.9	17.4	73.4	0.5	1.6
Poland	200	4.4	10.8	39	43.2	1.7	0.8
Portugal	201	3.6	7.2	21.4	61.3	6.4	0.1
Romania	200	1.2	1.8	17.6	72.9	0.8	5.7
Slovenia	200	0.5	8.9	40.5	48.1	0	1.9
Slovakia	200	3.3	8.7	26	54.5	1.7	5.8
Finland	205	4.3	10	43	42.2	0	0.5
Sweden	200	5.6	7.6	34.9	44.4	2.6	4.9
United Kingdom	251	11	11.4	30.1	33.8	11.3	2.4

Table 43b. Drivers that could accelerate eco-innovation: Good business partners - *by segments*

QUESTION: Q8_h. I will list you some drivers that could accelerate eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very important, somewhat important, not important or not at all important driver in case of your company? - Good business partners

	Total N	% Not at all important	% Not important	% Somewhat important	% Very important	% Not applicable	% DK/NA
EU27	5222	7.5	11.4	30.9	44.7	4.1	1.4
COMPANY SIZE							
10–49 employees	4337	7.1	11.1	30.3	45.7	4.3	1.5
50+ employees	885	9.3	13.2	33.7	39.5	3	1.2
ACTIVITY							
Agriculture and fishing	205	5.5	11.2	29	49.2	4	1.1
Construction	1526	6.7	10.9	33.9	43.7	3.1	1.7
Water supply; sewerage; waste management and remediation activities	106	4.1	17.7	34.8	41.5	1.7	0.2
Manufacture	2843	7.5	12.2	28.6	46.5	3.9	1.3
Food services	543	11.1	7.5	34.8	36.7	8.5	1.4
TURNOVER							
Up to 2 million euro	2511	7.9	10.8	27.7	48.1	4.5	1
2-10 million euro	1587	8.3	12.6	32.7	41.9	3.5	1
10-50 million euro	449	5.4	10.9	36.2	43.3	1.9	2.2
50 million euro and over	94	0.6	17	38.8	38.4	1.2	3.9
ANNUAL TURNOVER OVER THE PAST 2 YRS							
Increased	1461	6.3	10.6	31.1	47.6	3.2	1.2
Remained unchanged	1518	6.9	11.8	35.1	41.6	3.6	1.1
Decreased	2110	9	11.7	27.2	45.9	4.6	1.6
MATERIAL COST							
Less than 10%	485	12	14.4	33.8	34.7	4.9	0.2
Between 10% and 29%	1326	7.6	11.8	32.2	42.9	4	1.5
Between 30% and 49%	1628	6.4	10.3	29.2	49.7	3.6	0.8
50% or more	1236	7.1	11.3	31	46.8	2.4	1.4
ECO-INNOVATION							
Yes	2331	6.9	10.1	30.8	49.2	2.2	0.9
No	2891	7.9	12.5	31	41	5.7	1.8

Table 44a. Drivers that could accelerate eco-innovation: Current high energy price – *by country*

QUESTION: Q8_i. I will list you some drivers that could accelerate eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very important, somewhat important, not important or not at all important driver in case of your company? - Current high energy prices (as an incentive to innovative, to use less energy and decrease the cost)

	Total N	% Not at all important	% Not important	% Somewhat important	% Very important	% Not applicable	% DK/NA
EU27	5222	5.1	10.7	29.3	50.4	3.2	1.3
COUNTRY							
Belgium	201	3.5	5.7	21.5	65.7	2.5	1
Bulgaria	204	3.2	5.8	27.1	60.1	1.3	2.3
Czech Rep.	200	2.8	34.7	31	29.7	1	0.8
Denmark	201	4.2	15.1	36.3	40.2	3.2	1
Germany	250	5.4	10.7	26.4	54.1	3.4	0
Estonia	200	9.7	6.3	25.3	50	8.3	0.5
Greece	201	1.9	1.1	24	70.2	2.3	0.5
Spain	250	1.7	7.8	13.1	76.4	0.6	0.4
France	250	6.4	11.1	40.9	37.3	3.9	0.5
Ireland	200	2.2	5.9	35.5	53.2	2.3	1
Italy	251	6.4	17	32.8	40.7	2	1.1
Cyprus	50	1.4	2	16.9	77.1	0	2.7
Latvia	202	5.2	3.5	23.8	62.5	3.4	1.6
Lithuania	202	0.4	3.3	21.4	71.9	1.9	1.1
Luxembourg	51	5.9	6	27.5	58	0	2.6
Hungary	202	3.4	4.8	18.4	58.1	12.4	2.8
Malta	50	7.7	2.2	6	84.1	0	0
Netherlands	200	3.3	16.9	28.3	39.8	9.3	2.4
Austria	200	3.2	6.1	27.4	58.3	4	1
Poland	200	8.1	8.5	38.1	42.6	2.2	0.6
Portugal	201	4.6	2.5	17	70.1	5.3	0.6
Romania	200	2.3	2.6	18.8	70.2	0.9	5.2
Slovenia	200	2.7	7.3	32.1	56	0	1.9
Slovakia	200	4.5	7.7	22.9	56.2	3.2	5.3
Finland	205	7.5	7.9	39.5	44.6	0.5	0
Sweden	200	9.2	11.2	28	43	2.9	5.7
United Kingdom	251	4.8	8.3	34.9	43.2	5.4	3.4

Table 44b. Drivers that could accelerate eco-innovation: Current high energy price - *by segments*

QUESTION: Q8_i. I will list you some drivers that could accelerate eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very important, somewhat important, not important or not at all important driver in case of your company? - Current high energy prices (as an incentive to innovative, to use less energy and decrease the cost)

	Total N	% Not at all important	% Not important	% Somewhat important	% Very important	% Not applicable	% DK/NA
EU27	5222	5.1	10.7	29.3	50.4	3.2	1.3
COMPANY SIZE							
10–49 employees	4337	5.4	10.5	28.7	50.6	3.4	1.4
50+ employees	885	3.4	11.7	32.2	49.5	2.3	1
ACTIVITY							
Agriculture and fishing	205	3.6	7.9	27.4	57.9	2.6	0.7
Construction	1526	4.6	10.5	31.3	48.1	3.9	1.6
Water supply; sewerage; waste management and remediation activities	106	3.6	6.6	44.7	44.7	0.3	0.1
Manufacture	2843	6.1	12	28.1	49.5	3	1.3
Food services	543	2.1	5.7	27.7	59.6	3.8	1.1
TURNOVER							
Up to 2 million euro	2511	4.9	9.1	27.7	54.3	3.3	0.8
2-10 million euro	1587	6.3	13.3	29.7	46.7	3.2	0.8
10-50 million euro	449	3	10.5	34.7	47.7	1.7	2.4
50 million euro and over	94	5.2	10.7	37.1	44.2	0.5	2.2
ANNUAL TURNOVER OVER THE PAST 2 YRS							
Increased	1461	4.3	9.3	30.7	51.7	3	1
Remained unchanged	1518	5	12.4	33.8	45.1	2.8	0.9
Decreased	2110	6	9.7	25.3	54.2	3.6	1.3
MATERIAL COST							
Less than 10%	485	7.8	10.1	31.5	45.4	5.2	0
Between 10% and 29%	1326	5	11.6	30.5	49.7	2.2	1.1
Between 30% and 49%	1628	4.3	11.8	27	52.5	3.3	1.2
50% or more	1236	5.3	9.8	30.8	51.6	1.5	1
ECO-INNOVATION							
Yes	2331	3.2	8.7	28.4	57.1	1.9	0.7
No	2891	6.6	12.2	30.1	45	4.3	1.8

Table 45a. Drivers that could accelerate eco-innovation: Expected future increases in energy price – *by country*

QUESTION: Q8_j. I will list you some drivers that could accelerate eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very important, somewhat important, not important or not at all important driver in case of your company? - Expected future increases in energy prices

	Total N	% Not at all important	% Not important	% Somewhat important	% Very important	% Not applicable	% DK/NA
EU27	5222	5.3	8.8	29.6	52.3	2.4	1.6
COUNTRY							
Belgium	201	3.8	3.1	28.6	60.4	3.5	0.5
Bulgaria	204	1.4	6	24.7	66	1	0.8
Czech Rep.	200	2.2	40.4	25.4	30.2	0.9	0.8
Denmark	201	5.2	7.8	39.7	43.1	3.1	1.1
Germany	250	5	6.9	28.5	58.4	0.9	0.4
Estonia	200	5.8	4.5	22.8	60.8	4.2	1.9
Greece	201	3.5	1.8	18.6	75.9	0.2	0
Spain	250	2.9	6.5	13.9	74.9	0.6	1.2
France	250	7.5	10.1	47.7	28.9	4.1	1.6
Ireland	200	0	3.3	25.2	68.2	1.5	1.8
Italy	251	8.2	14.3	31.5	42.3	2.1	1.6
Cyprus	50	3.3	4.3	8	77.5	2.7	4.3
Latvia	202	6.6	3.5	22.7	62.3	3.3	1.6
Lithuania	202	2.4	4.3	18.5	72.7	0.8	1.2
Luxembourg	51	8.7	3.4	36.7	51.2	0	0
Hungary	202	9.1	4.5	12	58.6	10.4	5.4
Malta	50	5.5	2.2	7.7	84.6	0	0
Netherlands	200	2.4	15.6	24.9	46.4	8.3	2.4
Austria	200	2.5	4.5	28.1	61.8	2.2	1
Poland	200	7	5.4	32.4	54.1	1.1	0
Portugal	201	3	6.7	10.2	74.9	5.2	0.1
Romania	200	1.7	3	23.5	66.1	0	5.7
Slovenia	200	3.8	4.3	30.1	59.8	0	1.9
Slovakia	200	4.2	7.1	24.9	55.4	2.8	5.5
Finland	205	6	8.8	36	46.6	0.6	2
Sweden	200	7.1	10.2	34.6	39.9	3.8	4.4
United Kingdom	251	3.3	3	35.7	53.4	2.2	2.4

Table 45b. Drivers that could accelerate eco-innovation: Expected future increases in energy price - *by segments*

QUESTION: Q8_j. I will list you some drivers that could accelerate eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very important, somewhat important, not important or not at all important driver in case of your company? - Expected future increases in energy prices

	Total N	% Not at all important	% Not important	% Somewhat important	% Very important	% Not applicable	% DK/NA
EU27	5222	5.3	8.8	29.6	52.3	2.4	1.6
COMPANY SIZE							
10–49 employees	4337	5.5	8.9	28.9	52.6	2.5	1.7
50+ employees	885	4.6	8.2	32.8	51.2	2.1	1.1
ACTIVITY							
Agriculture and fishing	205	4.8	7.3	22.9	61.2	2.8	1
Construction	1526	5.5	9.9	30.9	49.4	2.7	1.6
Water supply; sewerage; waste management and remediation activities	106	0.9	9	37	52.8	0.2	0.1
Manufacture	2843	6.1	9	29.2	52.2	2.2	1.4
Food services	543	2	5.4	28.7	58.1	2.8	2.9
TURNOVER							
Up to 2 million euro	2511	5.7	8.4	27.3	55.4	2.3	0.8
2-10 million euro	1587	5.4	9.8	31.6	49.6	2	1.6
10-50 million euro	449	4.7	7.8	33.7	50.6	1.7	1.6
50 million euro and over	94	3.1	5.8	45.7	41.8	0.4	3.1
ANNUAL TURNOVER OVER THE PAST 2 YRS							
Increased	1461	3.9	6.7	31	55.6	1.7	1.1
Remained unchanged	1518	5.4	10.4	34.6	45.4	2.3	1.9
Decreased	2110	6.3	8.8	24.9	55.7	2.8	1.5
MATERIAL COST							
Less than 10%	485	9	8.4	31.2	45.3	5.6	0.5
Between 10% and 29%	1326	5.3	9.5	30.4	51.1	1.4	2.1
Between 30% and 49%	1628	5.7	8.6	29.5	53.4	1.6	1.3
50% or more	1236	4.1	8.4	29.2	55.9	1.8	0.6
ECO-INNOVATION							
Yes	2331	4.1	6.8	27.9	59.5	1	0.8
No	2891	6.3	10.5	30.9	46.6	3.5	2.3

Table 46a. Drivers that could accelerate eco-innovation: Existing regulations, including standards – *by country*

QUESTION: Q8_1. I will list you some drivers that could accelerate eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very important, somewhat important, not important or not at all important driver in case of your company? - Existing regulations, including standards

	Total N	% Not at all important	% Not important	% Somewhat important	% Very important	% Not applicable	% DK/NA
EU27	5222	7.3	14.6	41	29.8	4.2	3.1
COUNTRY							
Belgium	201	6	8.7	36.9	41.1	3.4	4
Bulgaria	204	4.5	8.8	30.3	50.3	2.6	3.5
Czech Rep.	200	4.3	25.3	45.1	23.1	1	1.3
Denmark	201	13.7	17.7	41.5	19.6	3.7	3.8
Germany	250	6.9	22.8	41.1	24.2	4.2	0.8
Estonia	200	13	9.9	40.3	29.8	3.3	3.8
Greece	201	5	6.2	44.1	35.3	1.3	8
Spain	250	7.1	14.3	37.7	36.1	1.3	3.5
France	250	11.4	6.6	53.4	21.1	5.8	1.6
Ireland	200	3.7	11.7	43.3	37.3	1.7	2.3
Italy	251	6.5	18.3	37.4	33.2	2.7	1.9
Cyprus	50	5.9	12	24	50	0	8.1
Latvia	202	19	17.4	27.9	29.8	3	2.9
Lithuania	202	1.9	12	38.7	40.1	3.1	4.2
Luxembourg	51	6.2	7.1	34.1	50	2.6	0
Hungary	202	8.2	6.4	24.1	42.7	15.4	3.2
Malta	50	11.6	0	17.1	68	3.3	0
Netherlands	200	7.5	17.4	35.9	24.7	11.8	2.8
Austria	200	1.7	16.6	49.3	24	4.3	4.1
Poland	200	7.2	14.8	46.3	25.7	2.8	3.2
Portugal	201	3.8	11.8	44.8	35.4	3.2	1
Romania	200	3.9	7.5	30.7	48.5	1.9	7.5
Slovenia	200	2.3	12.5	47.1	34.5	0	3.6
Slovakia	200	6.9	19.9	33.2	25.4	6.4	8.3
Finland	205	8.9	21.3	39.3	29.6	0.9	0
Sweden	200	13.6	21.2	33.1	13.2	5.2	13.7
United Kingdom	251	6.5	8.1	40.9	31.5	6.7	6.3

Table 46b. Drivers that could accelerate eco-innovation: Existing regulations, including standards - *by segments*

QUESTION: Q8_l. I will list you some drivers that could accelerate eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very important, somewhat important, not important or not at all important driver in case of your company? - Existing regulations, including standards

	Total N	% Not at all important	% Not important	% Somewhat important	% Very important	% Not applicable	% DK/NA
EU27	5222	7.3	14.6	41	29.8	4.2	3.1
COMPANY SIZE							
10–49 employees	4337	7.1	14.8	40.6	30.3	4.1	3.1
50+ employees	885	8.2	13.2	43.3	27.4	4.9	3.1
ACTIVITY							
Agriculture and fishing	205	6.5	15.1	40.8	31.5	2.8	3.3
Construction	1526	6.6	14.7	42.8	29	3.9	2.9
Water supply; sewerage; waste management and remediation activities	106	16.5	19.8	31.6	31.6	0	0.5
Manufacture	2843	7.3	15.3	39.8	30.2	4.3	3.2
Food services	543	7.7	9.1	44.7	29.1	5.9	3.4
TURNOVER							
Up to 2 million euro	2511	7.6	14.7	40	31.2	4	2.6
2-10 million euro	1587	8	15.4	42.8	27	4.6	2.1
10-50 million euro	449	6.6	13.8	41.3	30.6	3	4.7
50 million euro and over	94	4	16	42.6	31.2	1.9	4.3
ANNUAL TURNOVER OVER THE PAST 2 YRS							
Increased	1461	7.8	12.4	43.4	30.2	3.2	3
Remained unchanged	1518	6.5	16.2	42.8	26.9	4.5	3
Decreased	2110	7.9	14.6	38.4	32	4.1	2.9
MATERIAL COST							
Less than 10%	485	7.4	11.8	45.8	28.9	4.8	1.3
Between 10% and 29%	1326	8.3	13.6	45.6	26.5	3.2	2.8
Between 30% and 49%	1628	7.6	17.2	39.6	30.2	3.5	2
50% or more	1236	5.8	16.3	37.2	32.9	4.1	3.7
ECO-INNOVATION							
Yes	2331	6.2	13	41.9	34.1	2.7	2.2
No	2891	8.2	15.8	40.4	26.3	5.4	3.9

Table 47a. Drivers that could accelerate eco-innovation: Expected future regulations imposing new standards – *by country*

QUESTION: Q8_m. I will list you some drivers that could accelerate eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very important, somewhat important, not important or not at all important driver in case of your company? - Expected future regulations imposing new standards

	Total N	% Not at all important	% Not important	% Somewhat important	% Very important	% Not applicable	% DK/NA
EU27	5222	7.7	14.2	38	32.6	3.9	3.7
COUNTRY							
Belgium	201	6.1	8	35.8	41.5	4.1	4.5
Bulgaria	204	4.5	6.7	35.9	48.4	2.5	2
Czech Rep.	200	3.6	21.5	47.8	23.6	1	2.6
Denmark	201	6.8	17.1	38.8	30	3.4	3.9
Germany	250	12.5	19.5	32.8	29.2	5	0.9
Estonia	200	11.2	5.9	34.8	34	6.5	7.7
Greece	201	2.7	1.7	40.2	53.1	0	2.4
Spain	250	4.4	11.3	36.6	42.6	0.9	4
France	250	8.6	11.5	47.3	26.5	3.9	2.1
Ireland	200	5.4	9	38.5	40.2	1.9	5
Italy	251	8.3	22.1	32	32.5	2.1	3.1
Cyprus	50	6	10.5	26.1	47.6	2	7.9
Latvia	202	11.7	9.1	29.2	38.4	4.2	7.5
Lithuania	202	2.2	7.4	38	46.1	1.6	4.7
Luxembourg	51	2.9	3.1	35.8	57.3	0.9	0
Hungary	202	8.8	5	23	40.3	11.8	11
Malta	50	11	4.4	13.8	63.1	3.3	4.4
Netherlands	200	6.4	15	30.7	30.9	14.1	2.9
Austria	200	7.6	14	46	24.9	2.9	4.6
Poland	200	6.7	13.1	43.1	30.9	3.6	2.5
Portugal	201	8.7	13.1	44.2	27.7	4.1	2.2
Romania	200	2.9	7.3	33	48	2.2	6.7
Slovenia	200	2.4	9.8	41.6	43	0	3.2
Slovakia	200	5.1	12.7	34.5	30.9	5.1	11.7
Finland	205	5.9	15.3	46.7	29.8	1.4	0.9
Sweden	200	11.7	21.5	33.4	19.2	5.8	8.4
United Kingdom	251	6.5	6.2	43.9	30.6	5.2	7.6

Table 47b. Drivers that could accelerate eco-innovation: Expected future regulations imposing new standards - *by segments*

QUESTION: Q8_m. I will list you some drivers that could accelerate eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very important, somewhat important, not important or not at all important driver in case of your company? - Expected future regulations imposing new standards

	Total N	% Not at all important	% Not important	% Somewhat important	% Very important	% Not applicable	% DK/NA
EU27	5222	7.7	14.2	38	32.6	3.9	3.7
COMPANY SIZE							
10–49 employees	4337	7.9	14.5	37	32.8	3.9	3.9
50+ employees	885	6.6	12.7	42.7	31.8	3.4	2.8
ACTIVITY							
Agriculture and fishing	205	4.6	13.9	37.5	36.6	2.8	4.6
Construction	1526	6.1	13.3	38.6	35	3.6	3.4
Water supply; sewerage; waste management and remediation activities	106	6.2	15.2	44.9	30.5	0	3.3
Manufacture	2843	9.3	15.5	36.8	30.8	3.8	3.8
Food services	543	5.5	9.7	41.3	33.9	6	3.5
TURNOVER							
Up to 2 million euro	2511	7.5	14.4	37.1	34.1	3.8	3.1
2-10 million euro	1587	9.1	14.8	37.6	31.5	3.6	3.5
10-50 million euro	449	8.2	10.4	44.2	30.8	3.3	3.1
50 million euro and over	94	2.1	19.8	30.4	42.3	1.4	4.1
ANNUAL TURNOVER OVER THE PAST 2 YRS							
Increased	1461	7.6	12.6	39.8	32.4	3.6	3.9
Remained unchanged	1518	7.3	15.2	39.4	31.3	4	2.7
Decreased	2110	8.4	14.1	35.6	34.3	3.8	3.7
MATERIAL COST							
Less than 10%	485	7.9	11.4	42.8	30.6	5.8	1.6
Between 10% and 29%	1326	8.2	15.5	38.4	31.8	3	3.2
Between 30% and 49%	1628	8.7	16.4	36.3	32.8	3.3	2.5
50% or more	1236	6.6	12.8	39	34.9	3.1	3.5
ECO-INNOVATION							
Yes	2331	7.2	12.6	37.8	36.6	2.7	3
No	2891	8.1	15.4	38.1	29.4	4.8	4.2

Table 48a. Drivers that could accelerate eco-innovation: Access to existing subsidies and fiscal incentives – *by country*

QUESTION: Q8_n. I will list you some drivers that could accelerate eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very important, somewhat important, not important or not at all important driver in case of your company? - Access to existing subsidies and fiscal incentives

	Total N	% Not at all important	% Not important	% Somewhat important	% Very important	% Not applicable	% DK/NA
EU27	5222	7.4	13.9	31.8	40.2	4.6	2.1
COUNTRY							
Belgium	201	5.2	13.1	30.4	42.9	5.2	3.3
Bulgaria	204	3.6	3.6	24.4	64.4	2.4	1.6
Czech Rep.	200	4.2	29.1	34.1	27.8	3.1	1.7
Denmark	201	16.6	29.5	32.1	14.8	4.3	2.7
Germany	250	10.1	18.9	34.7	30.9	5	0.4
Estonia	200	11.1	8.9	29.3	44.5	5.3	0.9
Greece	201	3.4	4.6	23.3	67.7	0.4	0.5
Spain	250	2.5	8.6	25.5	60.5	2.1	0.8
France	250	12.9	10.9	42	30.4	3.6	0.2
Ireland	200	7.4	14.4	32.2	39.1	5.1	1.7
Italy	251	6.1	16.9	30.3	43.8	1.2	1.7
Cyprus	50	5.9	5.5	18.8	61.3	4.3	4.3
Latvia	202	11	7.3	21.3	50.9	8.1	1.4
Lithuania	202	0.8	11.2	31.6	46.3	5.4	4.7
Luxembourg	51	8.9	4.3	26.3	56.1	4.3	0
Hungary	202	2.2	1.8	11.6	71.7	11.7	1.1
Malta	50	3.3	8.8	4.9	80.8	2.2	0
Netherlands	200	4.8	18.4	27.3	31.7	14	3.8
Austria	200	4	10.6	28.4	52.2	2.7	2.2
Poland	200	8.4	15.1	34.2	39.7	2.4	0.3
Portugal	201	6.8	6.8	31.6	43.4	9.8	1.5
Romania	200	1.8	5.5	22.2	59	4.2	7.3
Slovenia	200	4.4	5.8	36.6	47.6	2.6	3
Slovakia	200	3.3	13	27.1	45.7	5.2	5.6
Finland	205	12	16.6	41.8	24.6	3.5	1.6
Sweden	200	12.4	17.1	36.4	24.1	2.4	7.6
United Kingdom	251	8.2	16.2	33.4	23.5	11.1	7.7

Table 48b. Drivers that could accelerate eco-innovation: Access to existing subsidies and fiscal incentives - *by segments*

QUESTION: Q8_n. I will list you some drivers that could accelerate eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very important, somewhat important, not important or not at all important driver in case of your company? - Access to existing subsidies and fiscal incentives

	Total N	% Not at all important	% Not important	% Somewhat important	% Very important	% Not applicable	% DK/NA
EU27	5222	7.4	13.9	31.8	40.2	4.6	2.1
COMPANY SIZE							
10–49 employees	4337	7.3	13.5	31.1	41.1	4.9	2
50+ employees	885	8.1	15.5	35.4	35.7	2.9	2.5
ACTIVITY							
Agriculture and fishing	205	3.2	10.8	34.2	47.9	3.5	0.5
Construction	1526	7.2	12.5	31.5	42.1	4.8	2
Water supply; sewerage; waste management and remediation activities	106	4.1	21.1	36.1	37.6	0.6	0.6
Manufacture	2843	7.4	15.4	32	38.6	4.3	2.3
Food services	543	10.5	9.5	30.6	40.7	6.6	2.1
TURNOVER							
Up to 2 million euro	2511	7.5	12.2	29.2	44.8	4.8	1.5
2-10 million euro	1587	8.6	14	33.6	38.1	3.8	1.9
10-50 million euro	449	6.1	20.9	38.1	30.1	3.9	0.9
50 million euro and over	94	6.7	18.2	36	33.9	3.9	1.3
ANNUAL TURNOVER OVER THE PAST 2 YRS							
Increased	1461	7.6	14.6	33.9	37.3	4.3	2.4
Remained unchanged	1518	7.5	15	33.2	38.1	4.6	1.6
Decreased	2110	7.3	12	30.1	44.6	4.4	1.7
MATERIAL COST							
Less than 10%	485	9.4	14.2	33.7	36.4	5.7	0.7
Between 10% and 29%	1326	8.9	14.2	32.9	38.8	3.3	1.9
Between 30% and 49%	1628	6.4	15.2	30.4	41.8	4.6	1.6
50% or more	1236	7.4	12.8	32.6	43	2.9	1.3
ECO-INNOVATION							
Yes	2331	6.6	13.3	30.9	45.6	2.4	1.2
No	2891	8.1	14.4	32.6	35.8	6.3	2.8

Table 49a. Drivers that could accelerate eco-innovation: Increasing market demand for green products – *by country*

QUESTION: Q8_o. I will list you some drivers that could accelerate eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very important, somewhat important, not important or not at all important driver in case of your company? - Increasing market demand for green products

	Total N	% Not at all important	% Not important	% Somewhat important	% Very important	% Not applicable	% DK/NA
EU27	5222	7.8	14.7	31.9	35.8	7.8	2
COUNTRY							
Belgium	201	7	9.8	30.1	45.5	6.6	1
Bulgaria	204	9.5	10.8	28	41.5	7.2	2.9
Czech Rep.	200	6.4	44	22.9	21.5	3.4	1.8
Denmark	201	8.8	17.2	35.1	32.6	4.6	1.6
Germany	250	8.8	14.6	31.7	33.3	11.2	0.4
Estonia	200	13.6	10.3	29	27.9	15.5	3.6
Greece	201	2	2.6	24.2	67.3	3.8	0
Spain	250	8.4	14.3	24.5	48.9	2.4	1.5
France	250	10.8	15.7	40.4	26.1	6.1	0.9
Ireland	200	3.9	14.1	41.3	34.3	3.7	2.7
Italy	251	7.7	15.8	30.5	39.3	4.9	1.7
Cyprus	50	5.3	7.7	23.4	45.1	11.6	7
Latvia	202	19.9	11.7	21.4	36.2	9.5	1.3
Lithuania	202	3.1	10.3	34	39.7	7.8	5.1
Luxembourg	51	5.8	4.3	42.8	46.1	0.9	0
Hungary	202	10.5	6.4	10	41.1	29.8	2.3
Malta	50	5.5	10	12.2	62.3	9.9	0
Netherlands	200	7.1	18.1	25.4	26.9	19.6	3
Austria	200	6	7.5	35.1	46	3.2	2.2
Poland	200	6.2	16.5	38.1	32.5	5.5	1.2
Portugal	201	5.3	10.4	24.9	41.4	16.8	1.2
Romania	200	0.9	5.1	25.2	51.3	9.1	8.4
Slovenia	200	6.7	10.3	44.9	33	1.2	3.8
Slovakia	200	6	21.9	21.5	33.3	8.4	8.9
Finland	205	9.8	16.8	43.6	25.1	4.7	0
Sweden	200	5.8	10.1	31.7	41.7	4.8	5.9
United Kingdom	251	6.6	13.6	41.9	26.7	8	3.3

Table 49b. Drivers that could accelerate eco-innovation: Increasing market demand for green products - *by segments*

QUESTION: Q8_o. I will list you some drivers that could accelerate eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very important, somewhat important, not important or not at all important driver in case of your company? - Increasing market demand for green products

	Total N	% Not at all important	% Not important	% Somewhat important	% Very important	% Not applicable	% DK/NA
EU27	5222	7.8	14.7	31.9	35.8	7.8	2
COMPANY SIZE							
10–49 employees	4337	7.5	14.7	31.2	36.4	8	2.2
50+ employees	885	8.9	15.2	35.2	32.9	6.6	1.2
ACTIVITY							
Agriculture and fishing	205	2.9	11.8	31.1	47.2	6	0.9
Construction	1526	7.4	14.1	34.6	34.5	7.5	1.9
Water supply; sewerage; waste management and remediation activities	106	15.5	27.4	29.2	25.5	2.2	0.2
Manufacture	2843	8.6	15.2	29.7	35.8	8.6	2.2
Food services	543	4.8	12.8	36.8	37.1	6.3	2.1
TURNOVER							
Up to 2 million euro	2511	7.5	14.3	28.8	39.9	7.7	1.8
2-10 million euro	1587	8.7	16.9	32	32.4	8.2	1.9
10-50 million euro	449	7.7	12.3	43.5	28	7	1.6
50 million euro and over	94	4.7	16.2	28.3	45.2	2.4	3.1
ANNUAL TURNOVER OVER THE PAST 2 YRS							
Increased	1461	6.8	13.8	35.8	35.6	6.5	1.6
Remained unchanged	1518	7.7	17.2	33.5	32.8	7.1	1.7
Decreased	2110	8.8	14	27.4	38.3	9.2	2.2
MATERIAL COST							
Less than 10%	485	9.8	17.2	32.1	30.6	10.2	0.1
Between 10% and 29%	1326	8.1	15.4	33	34.9	6.9	1.8
Between 30% and 49%	1628	8.1	14.5	32.3	35.9	7.4	1.8
50% or more	1236	6.2	14.9	32.7	38.8	5.8	1.6
ECO-INNOVATION							
Yes	2331	5.9	11	32.7	44.3	4.7	1.4
No	2891	9.3	17.8	31.2	29	10.3	2.5

II. Survey details

This Flash Eurobarometer survey "*Attitudes of European Entrepreneurs towards eco-innovation*" (N° 315) was conducted on behalf of the DG Environment of the European Commission, Unit F3 - Communication. The objective of the survey was to investigate the behaviour, attitudes and expectations of entrepreneurs towards the development and uptake of eco-innovation as a response to rising prices of resources and resource scarcity.

The interviews in most countries were conducted between the 24th January and 1st February 2011, by partner institutes of The Gallup Organization Hungary:

Belgium	BE	Gallup Europe	(Interviews : 24/01/2011 – 01/02/2011)
Czech Republic	CZ	Focus Agency	(Interviews : 24/01/2011 – 01/02/2011)
Denmark	DK	Norstat Denmark	(Interviews : 24/01/2011 – 01/02/2011)
Germany	DE	IFAK	(Interviews : 24/01/2011 – 01/02/2011)
Estonia	EE	Saar Poll	(Interviews : 24/01/2011 – 01/02/2011)
Greece	EL	Metroanalysis	(Interviews : 24/01/2011 – 01/02/2011)
Spain	ES	Gallup Spain	(Interviews : 24/01/2011 – 01/02/2011)
France	FR	Efficience3	(Interviews : 24/01/2011 – 01/02/2011)
Ireland	IE	Gallup UK	(Interviews : 24/01/2011 – 01/02/2011)
Italy	IT	Demoskopea	(Interviews : 24/01/2011 – 01/02/2011)
Cyprus	CY	CYMAR	(Interviews : 24/01/2011 – 01/02/2011)
Latvia	LV	Latvian Facts	(Interviews : 24/01/2011 – 01/02/2011)
Lithuania	LT	Baltic Survey	(Interviews : 24/01/2011 – 01/02/2011)
Luxembourg	LU	Gallup Europe	(Interviews : 24/01/2011 – 01/02/2011)
Hungary	HU	Gallup Hungary	(Interviews : 24/01/2011 – 01/02/2011)
Malta	MT	MISCO	(Interviews : 24/01/2011 – 01/02/2011)
Netherlands	NL	MSR	(Interviews : 24/01/2011 – 01/02/2011)
Austria	AT	Spectra	(Interviews : 24/01/2011 – 01/02/2011)
Poland	PL	Gallup Poland	(Interviews : 24/01/2011 – 01/02/2011)
Portugal	PT	Consulmark	(Interviews : 24/01/2011 – 01/02/2011)
Slovenia	SI	Cati d.o.o.	(Interviews : 24/01/2011 – 01/02/2011)
Slovakia	SK	Focus Agency	(Interviews : 24/01/2011 – 01/02/2011)
Finland	FI	Norstat Finland Oy	(Interviews : 24/01/2011 – 01/02/2011)
Sweden	SE	Norstat Sweden	(Interviews : 24/01/2011 – 01/02/2011)
United Kingdom	UK	Gallup UK	(Interviews : 24/01/2011 – 01/02/2011)
Bulgaria	BG	Vitosha Research	(Interviews : 24/01/2011 – 01/02/2011)
Romania	RO	Gallup Romania	(Interviews : 24/01/2011 – 01/02/2011)

Representativeness of the results

The target group for this Flash Eurobarometer was defined as companies small (10-49 employees) and medium (50-249 employees) and operating in the 27 Member States of the European Union. Target activities of the survey were the sectors of Agriculture, Manufacturing, Water supply and waste management, Construction and Food services.

The lists of companies qualified to be interviewed were developed by Dun and Bradstreet. Where the D&B database had a poor coverage (especially in the New Member States), the sample lists were developed by national institutes using local statistical data sources. The survey sample was selected randomly.

Weighting

During data processing, each cell in the cross distribution of sectors and employee size groups in the sample was weighted according to its actual, empirically verified known weight within the survey

region. Thus, the total results are representative of the total universe examined – both for country-level as well as global (e.g. EU-27) estimations. Country weights for global estimations were developed on the basis of the size of the universe in each country.

The person interviewed in each company was manager /director or the person responsible for strategic planning and decision making.

The interviewers checked the identity of this person as well as the accuracy of the enterprise sampling characteristics, as delivered by sample list, namely: the number of employees and the activity of the company.

Sizes of the samples

The targeted number of interviews varied dependent on the size of the country. In most countries, the targeted sample size was 200. However, in France, Germany, Italy, Spain and the UK, the sample size was increased to 250, while in Cyprus, Luxembourg and Malta, the sample size was reduced to 50.

	Total interviews conducted		Total interviews conducted
Belgium	201	**Malta**	50
Czech Republic	200	**Netherlands**	200
Denmark	201	**Austria**	200
Germany	250	**Poland**	200
Estonia	200	**Portugal**	201
Greece	201	**Slovenia**	200
Spain	250	**Slovakia**	200
France	250	**Finland**	205
Ireland	200	**Sweden**	200
Italy	251	**UK**	251
Cyprus	50	**Bulgaria**	204
Latvia	202	**Romania**	200
Lithuania	202		
Luxembourg	51		
Hungary	202	**TOTAL**	**5,222**

Questionnaires

The questionnaire prepared for this survey contained two parts: the company information and the question regarding the main questionnaire.

The institutes listed above translated the questionnaire to their respective national language(s) using a centralized process of back-translation procedure, involving two initial local translations, independent back-translation and central verification of the localised questionnaires.

III. Questionnaire

Attitudes of European entrepreneurs towards eco-innovation

D1. How many employees do you have in your company?
[READ OUT – ONLY ONE ANSWER]

- Less than 10 ..... [THANK AND TERMINATE]
- 10-49 1
- 50-249 2
- 250 or more ..... [THANK AND TERMINATE]
- [DK/NA] ..... [THANK AND TERMINATE]

D4. What is the main activity of your company?
[READ OUT THE MAIN CATEGORIES, THAN CONTINUE WITH THE SUB-CATEGORIES]

Agriculture and fishing
- Agriculture, hunting and related service activities 11
- Fishing, fish farming and related service activities 12
- Forestry and logging 13
- Fishing and aquaculture 14

Construction
- Construction of buildings 15
- Civil engineering 16
- Specialised construction activities 17

Water supply; sewerage; waste management and remediation activities
- Water collection, treatment and supply 18
- Sewerage 19
- Remediation activities and other waste management services 20
- Waste collection, treatment and disposal activities; materials recovery 21

Manufacture
- Manufacture of food/ tobacco products
  - Manufacture of food products or beverages 22
  - Manufacture of tobacco products 23
  - Manufacture of paper and paper products 24
  - Manufacture of textiles, wearing apparel, leather and related products 25
  - Manufacture of furniture 26
  - Manufacture of coke and refined petroleum products 27
  - Manufacture of chemicals and chemical products 28
  - Manufacture of basic pharmaceutical products and pharmaceutical preparations 29
  - Manufacture of rubber and plastic products or other non-metallic mineral products 30
  - Manufacture of basic metals or fabricated metal products (except machinery and equipment) 31
- Manufacture of machinery and equipment
  - Manufacture of machinery and equipment 32
  - Manufacture of transport equipment 33
  - Manufacture of electrical equipment 34
  - Manufacture of computer, electronic and optical products 35
  - Printing and reproduction of recorded media 36

Food services
- Restaurants and mobile food service activities 37
- Event catering and other food services 38
- Beverage serving activities 39

D2. What is the annual turnover of your company?
[READ OUT – ONLY ONE ANSWER]
- up to €2 million....1
- €2-10 million....2
- €10-50 million....3
- €50 million and over....4
- [DK/NA]....9

D3. Has your company's annual turnover decreased, remained unchanged or increased over the past two years?
[READ OUT – ONLY ONE ANSWER]
- Increased....1
- Remained unchanged....2
- Decreased....3
- [DK/NA]....9

Definition of eco-innovation: Eco-innovation is the introduction of any new or significantly improved product (good or service), process, organisational change or marketing solution that reduces the use of natural resources (including materials, energy, water and land) and decreases the release of harmful substances across the whole life-cycle.

[ASK ALL]
Q1. What percentage of your company's total cost - i.e. gross production value - is material cost? Material cost is the cost of all materials used to manufacture a product or perform a service.
[READ OUT – ONLY ONE ANSWER]
- Less than 10%....1
- Between 10% and 29%....2
- Between 30% and 49%....3
- 50% or more....4
- [Not applicable]....8
- [DK/NA]....9

[ASK ALL]
Q2. Have material costs for your company increased or decreased in the past 5 years?
[READ OUT– ONLY ONE ANSWER]
- Increased dramatically....1
- Increased moderately....2
- Remained unchanged....3
- Decreased....4
- [Not applicable]....8
- [DK/NA]....9

[ASK ALL]
Q3. Do you expect price increases for materials in the coming 5 to 10 years?
[READ OUT– ONLY ONE ANSWER]
- Yes, material costs will increase....1
- No, material costs will remain approximately the same....2
- No, material costs will decrease....3
- [Not applicable]....8
- [DK/NA]....9

[ASK ALL]
Q4. From what regions do most of the materials you use come / originate from?
[READ OUT– MULTIPLE ANSWERS POSSIBLE]

- Own country 1
- Other EU countries 2
- Other European countries (non-EU) 3
- Asia 4
- Africa 5
- North America 6
- South America 7
- Australia and Oceania 8
- [DK/NA] 9

[ASK ALL]
Q5. Have you implemented any changes to reduce material costs in the past 5 years?
[ROTATE - READ OUT- ONE ANSWER PER LINE]

- Mentioned 1
- Not mentioned 2
- [Not applicable] 8
- [DK/NA] 9

a. Changing business model	1	2	8	9
b. Improving the material flow in the supply chain	1	2	8	9
c. Substituting expensive materials for a cheaper ones	1	2	8	9
d. Purchasing more efficient technologies	1	2	8	9
e. Developing more efficient technologies in-house	1	2	8	9
f. Outsourcing production or service activities	1	2	8	9
g. Recycling	1	2	8	9

[ASK ALL]
Q6. Over the last 5 years, what share of innovation investments in your company were related to eco-innovation, i.e. implementing new or substantially improved solutions resulting in more efficient use in material, energy and water?
[READ OUT– ONLY ONE ANSWER]

- More than 50% 1
- Between 30% and 49% 2
- Between 10% and 29% 3
- Less than 10% 4
- None 5
- [No innovative activities] 8
- [DK/NA] 9

D5. During the past 24 months have you introduced the following eco-innovation
[READ OUT– ONE ANSWER PER LINE]

- Yes 1
- No 2
- [DK/NA] 9

a. a new or significantly improved eco-innovative product or service to the market	1	2	9
b. a new or significantly improved eco-innovative production process or method	1	2	9
c. a new or significantly improved eco-innovative organisational innovation	1	2	9

[ASK IF THE ANSWER IS "YES" TO ANY OF THE ITEMS IN D5.]

Q0. How would you describe the relevance of innovation you have introduced in the past 24 months in terms of resource efficiency?

[READ OUT– ONLY ONE ANSWER]

Less than 5% reduction of material use per unit output 1
Between 5% to 19% reduction of material use per unit output 2
Between 20% to 39% reduction of material use per unit output 3
Between 40% to 60% reduction of material use per unit output 4
More than 60% reduction of material use per unit output 5
[DK/NA] 9

[ASK ALL]

Q7. I will list you some barriers that could represent an obstacle to accelerated eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very serious, somewhat serious, not serious or not at all serious barrier in case of your company?

[ROTATE - READ OUT- ONE ANSWER PER LINE]

- Very serious 4
- Somewhat serious 3
- Not serious 2
- Not at all serious 1
- [Not applicable].....8
- [DK/NA] 9

a. Lack of funds within enterprise 1 2 9
b. Lack of external financing 1 2 9
c. Uncertain return on investment or too long payback period for eco-innovation 1 2 9
d. Lack of qualified personnel and technological capabilities within the enterprise 1 2 9
e. Limited access to external information and knowledge, including lack of well-developed technology support services 1 2 9
f. Lack of suitable business partners 1 2 9
g. Lack of collaboration with research institutes and universities 1 2 9
h. Uncertain demand from the market 1 2 9
i. Reducing material use is not an innovation priority 1 2 9
j. Reducing energy use is not an innovation priority 1 2 9
k. Technical and technological lock-ins in economy (e.g. old technical infrastructures) 1 2 9
l. Market dominated by established enterprises 1 2 9
m. Existing regulations and structures not providing incentives to eco-innovate 1 2 9
n. Insufficient access to existing subsidies and fiscal incentives 1 2 9

[ASK ALL]

Q8. I will list you some drivers that could accelerate eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very important, somewhat important, not important or not at all important driver in case of your company?

[ROTATE - READ OUT- ONE ANSWER PER LINE]

- Very important 4
- Somewhat important 3
- Not important 2
- Not at all important 1
- [Not applicable] 8
- [DK/NA] 9

a. Technological and management capabilities within the enterprise	1	2	9
b. Secure or increase existing market share	1	2	9
c. Current high material prices (as an incentive to innovate, to use less material and decrease the cost)	1	2	9
d. Limited access to materials	1	2	9
e. Expected future material scarcity (as an incentive to develop innovative, less material-intensive substitutes)	1	2	9
f. Collaboration with research institutes, agencies and universities	1	2	9
g. Good access to external information and knowledge, including technology support services	1	2	9
h. Good business partners	1	2	9
i. Current high energy prices (as an incentive to innovative, to use less energy and decrease the cost)	1	2	9
j. Expected future increases in energy prices	1	2	9
l. Existing regulations, including standards	1	2	9
m. Expected future regulations imposing new standards	1	2	9
n. Access to existing subsidies and fiscal incentives	1	2	9
o. Increasing market demand for green products	1	2	9