Flash Eurobarometer 498

SMEs, green markets and resource efficiency

Report

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Survey requested by the European Commission, Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs and coordinated by the Directorate-General for Communication

Flash Eurobarometer 498 – Ipsos European Public Affairs

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(DG COMM "Media Monitoring and Eurobarometer" Unit)

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Introduction

Europe's 23 million small and medium enterprises (SMEs)[1] are the backbone of the EU economy. They employ around 83 million people, account for about half of Europe's GDP and play a key role in adding value in every sector of the economy.

As well as being economically important, SMEs are environmentally important: although their individual impact is small, their cumulative impact on the environment is significant. With 67 tons, the average SME emits very little CO_2, especially if compared to emissions of 20 027 tons for the average large company (with 250 or more employees). Due to the large number of SMEs, however, their collective share in total emissions is high, at 63% of all CO_2 emissions by companies.[2]

Climate change and environmental degradation are an existential threat to Europe and the world. To overcome these challenges, the **European Green Deal** will transform the EU into a modern, resource-efficient and competitive economy.

The **European SME Strategy**[3] was announced on 10 March 2020 and aims to contribute to the objectives of the European Green Deal and other EU actions launched in the context of the twin digital and green transition, namely **achieving a climate-neutral, resource-efficient, and agile digital economy**, by **mobilising European SMEs across industrial sectors**.

In the context of the European SME Strategy, the Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs commissioned a **Flash Eurobarometer survey** to evaluate the current levels of resource efficiency actions and the state of the green market among Europe's SMEs, as well as in neighbouring countries and in the US. This survey builds on the work of previous Flash Eurobarometer surveys (FL342 in 2012, FL381 in 2013 and FL426 in 2015 and FL456 in 2017). Specifically, the survey covered the following topics:

- **Actions that SMEs are currently undertaking** to be more resource efficient, as well as **additional actions** that SMEs plan to implement over the next two years
- SMEs' **level of investment** in resource efficiency
- Measures in place to **reduce carbon footprint** and become climate neutral or negative
- **Barriers** to going green and resource efficient, such as complex administrative procedures or an **increase in production costs**

[1] The category of micro, small and medium-sized enterprises (SMEs) is made up of enterprises that employ fewer than 250 persons and that have an annual turnover not exceeding EUR 50 million, and/or an annual balance sheet total not exceeding EUR 43 million. (Extract of Article 2 of the annex to Recommendation 2003/361/EC)

[2] Source: European Commission, Annual Report on European SMEs (Forthcoming)

[3] Communication from the European Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions. **An SME Strategy for a sustainable and digital Europe.** COM/2020/103 final (https://ec.europa.eu/info/sites/default/files/communication-sme-strategy-march-2020_en.pdf)

- Type of **support for going green and resource efficient** – from in-house resources and expertise to **various types of external support**
- **Tools and forms of assistance that would help most** to go **green and resource efficient** – from grants or subsidies to demonstrations of technology
- **Green markets for SMEs**: SMEs offering green products or services, their main markets (domestic and export) and turnover attributed to these products and services
- Type of **support for producing green products or services**, including satisfaction with the level of external support
- **Forms of assistance that would help the most** to launch or expand the production and sale of **green products or services**
- **SMEs with employees in green jobs** (i.e. employees directly dealing with information, technologies or materials that preserves or restores environmental quality)

This survey was carried out by Ipsos European Public Affairs in 27 Member States of the European Union, Albania, North Macedonia, Montenegro, Serbia, Turkey, Iceland, Moldova, Norway and the US Between 8 November and 10 December 2021, more than 17 500 enterprises (both SMEs and large companies) were interviewed via telephone on behalf of the European Commission, Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs. The methodology used is that of Eurobarometer surveys as carried out by the Directorate-General for Communication ("Media monitoring and analysis" Unit). A technical note on the methodology used is appended to this report.

The main analysis presented in this report focuses on **SMEs in the EU** (13 343 interviews). The findings for SMEs are compared to those for large companies, with 250 or more employees, in the EU (872 interviews) and to those for SMEs in a selection of non-EU countries (3 200 interviews).

Notes:

1) **Survey data are weighted** to known population proportions. The EU27 averages are weighted according to the size of the SME population of each EU Member State.
2) Survey results are subject to sampling tolerances meaning that not all apparent differences between countries or groups may be **statistically significant**. Thus, only differences that are statistically significant (at the 5% level) – i.e. where it can be reasonably certain that they are unlikely to have occurred by chance – are highlighted in the text.
3) The report looks at the most recent **year-on-year changes** at EU and national level. The term **percentage point** is used when comparing two different percentages (the abbreviation is pp). Year-on-year differences are calculated from percentages with one decimal and are then rounded to the nearest integer.
4) Percentages may not add up to 100%, as they are **rounded to the nearest percent**. Due to rounding, it may also happen that the percentages for separate response options shown in the charts do not exactly add up to the totals shown in charts and tables, or mentioned in the text. Response percentages will exceed 100% if the question allowed respondents to select multiple responses.
5) For some of the small Member States (Cyprus, Malta and Luxembourg) and some of the non-EU countries surveyed (Albania, Montenegro and Moldova), the **sample size is relatively low** and results should be interpreted with caution as they carry a larger margin of error.
6) For some question asked to a subset of respondents, **national level analysis** is not carried out because the base sizes are too small.
7) In this report, countries are referred to by their official abbreviation. The abbreviations correspond to:

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

* Cyprus as a whole is one of the 27 EU MS. However, the 'acquis communautaire' has been suspended in the part of the country which is not controlled by the government of the Republic of Cyprus. For practical reasons, only the interviews carried out in the part of the country controlled by the government of the Republic of Cyprus are included in the 'CY' category.

Main findings

Going green and resource efficient

Most SMEs surveyed are taking measures to be more resource efficient: 89% of SMEs are taking at least one of the actions listed in the survey, compared to 9% that are not taking any action.

- The proportion of SMEs not taking any action to be more resource efficient is low in most Member States. In half of the Member States, on the other hand, there are at least 10% of SMEs that are not (yet) taking action; with the overall highest proportion observed in Estonia (23%), followed by Bulgaria and Poland (both 19%).
- Compared to 2017 (Flash Eurobarometer 456), there is a small, but significant, decrease in the proportion of SMEs across the EU that are not taking any action to be more resource efficient (from 11% to 9%, -2 pp). A decrease in the proportion of SMEs not taking actions is also seen in a majority of the individual Member States.

The **most common resource efficiency actions undertaken by SMEs** are minimising waste (64%), saving energy (61%), saving materials (57%), recycling by reusing material or waste within the company (47%) and saving water (46%).

- Compared to 2017, SMEs are now more likely to reuse material or waste within their company (47%, +8 pp), use predominantly renewable energy sources (19%, +6 pp) and sell their residues and waste (24%, +4 pp). For these actions, the trend in most of the individual Member States also shows this increase in uptake.

More than three-quarters (77%) of SMEs plan to implement (further) measures to improve resource efficiency in their company. The most common resource efficiency actions that are planned for the next two years are saving energy (53%), minimising waste (50%) and saving materials (48%).

- A large majority (83%) of SMEs that are already undertaking resource efficiency actions are planning to implement additional actions over the next two years. Among **SMEs not yet taking resource efficiency actions**, however, 73% say they also do not plan to implement any such actions in the next two years.
- The proportion of SMEs that have not planned to implement additional resource efficiency actions in the next two years varies between 4% in Spain and 45% in Denmark. In Germany, Finland and Estonia, more than a third of respondents will not take additional resource efficiency measures (between 34% and 36%).

Investment in resource efficiency

A vast majority of SMEs across the EU are taking resource efficiency measures, but **actual investment in resource efficiency remains low – 35% of SMEs surveyed invested 1% or more of their turnover in this area in the past two years.** This figure, nonetheless, represents an increase compared to 2017 (+4 pp).

- 11% of SMEs reply that they have invested, on average, more than 5% of their annual turnover over the past two years to become more resource efficient and 24% say that the investment amounted to between 1% and 5%, on average, of their annual turnover.
- In a majority of Member States, there is an increase, compared to 2017, in the proportion of SMEs that have invested at least 1% of their annual turnover on resource efficiency measures in the past two years.

Carbon reduction strategies

A vast majority of SMEs (72%) do not (yet) have a **concrete strategy in place to reduce their carbon footprint and become climate neutral or negative**; about a quarter of these SMEs reply that they are planning to define one. One in five SMEs already have a concrete strategy in place to reduce their carbon footprint and 4% say they are already climate neutral.

- The proportion of SMEs with a concrete carbon reduction strategy in place varies between 6% in Cyprus and 38% in Sweden. In half of the EU Member States, at least one in five SMEs report having such a strategy in place.
- The **most common actions undertaken to become carbon neutral** (among SMEs with a carbon reduction strategy) are generally reducing carbon emissions in their SME (53%) and adopting or purchasing new technological solutions (49%).

Barriers to going green and resource efficient

The **most common difficulty SMEs encountered when setting up resource efficiency actions** is the **complexity of administrative or legal procedures** (34%), followed by the cost of environmental actions (24%). In the current survey, SMEs are also considerably more likely to report that they were hindered by **a lack of supply of the required materials, parts, products or services** (24%, +9 pp compared to 2017).

- In 11 Member States, the largest share of SMEs undertaking resource efficiency actions, say they encountered **complex administrative or legal procedures** (from 31% in Luxembourg to 53% in Spain).
- The proportion of SMEs that did **not** experience any difficulties setting up resource efficiency actions has decreased compared to 2017 (to 32%, -5 pp). In 13 Member States, the largest share of SMEs reply that they **did not encounter any difficulties**; this proportion is the highest in the Netherlands (49%), followed by Italy (45%), and Estonia and Denmark (both 43%).

Among SMEs taking resource efficiency actions, **equal proportions say these actions have decreased vs increased their production costs over the past two years** (both 31%). About a quarter (26%) report that there has been no change in production costs as a result of the resource efficiency actions.

- In Croatia, almost one in two SMEs (47%) say that the resource efficiency actions they have undertaken have led to a decrease in production costs over the past two years. In Ireland, on the other hand, an almost equal proportion (44%) state the opposite.
- **Since 2017**, the proportion of SMEs saying that **production costs have increased** as a result of the resource efficiency actions has significantly increased: +8 pp for 'slightly increased' and +6 pp for 'significantly increased'. This trend is seen in most Member States.

Support to go green and resource efficient

Among SMEs that take resource efficiency actions, 64% rely on their **own financial resources** and 54% on their **own technical expertise** in their efforts to be more resource efficient. About a quarter of SMEs (24%) rely on **external support**.

- In 12 Member States, the proportion of SMEs relying on external support to be more resource efficient has increased by five or more percentage points compared to 2017.
- More than a third (36%) of SMEs relying on external support in their efforts to be more resource efficient say they receive **public funding**, such as grants, guarantees or loans (+11 pp compared to 2017). Over a quarter (28%) receive **private funding** from a bank, investment company or venture capital fund.
- About four in ten (39%) SMEs relying on external support receive **advice or other non-financial assistance** from private consulting and audit companies, followed by 30% mentioning this type of support from supply chain partners and 29% from business associations and clusters. Just under a quarter (23%) receive advice or other non-financial assistance from public administration.

More than one third of SMEs (36%) think that **grants or subsidies would help their company the most to be more resource efficient**; as in 2017, this is the most-mentioned form of assistance. About a quarter of SMEs (26%) say that **better cooperation between companies across sectors**, so that new processes to reuse waste and by-products can be developed, would help them the most; this response is selected by a larger share than in 2017 (+6 pp).

- In 23 Member States, the largest share of SMEs think that **grants or subsidies** would help their company the most to be more resource efficient. In six Member States, this proportion is above 50%: Spain (51%), Romania (52%), Slovakia (53%), Greece (54%), Slovenia (55%) and Malta (60%).
- Among SMEs **not yet taking resource efficiency actions**, 55% reply that none of the measures and tools listed in the survey would help them to be more resource efficient and, only for grants and subsidies, more than one in ten respondents (18%) reply that these would help them.

Green products and services

Green products and services are defined as products and services with a predominant function of **reducing environmental risk and minimising pollution and resources**. About one in three (32%) SMEs in the EU **offer green products or services**, with a further 11% **planning to do so in the next two years**. Compared to 2017, there is a seven-point increase in the proportion of SMEs currently offering green products or services and a three-point increase in the proportion planning to do so in the next two years.

- SMEs in Sweden (43%), Austria (44%) and the Netherlands (45%) are the most likely to have green products or services in their offer. SMEs in Greece (25%), Ireland (27%) and Romania (30%) are the most likely to say they are not currently offering green products or services but are planning to do so in the next two years.
- In 17 Member States, the proportion of SMEs offering green products or services has increased by at least five percentage points **compared to 2017**. The largest increases are observed in Luxembourg (+16 pp, to 41%), France (+15 pp, to 38%), Slovenia (+14 pp, to 37%) and Cyprus (+14 pp, to 32%).
- Most SMEs selling green products or services have been doing so for **more than three years** (64%). About one in four (26%) have been selling them for one to three years, while 8% have been selling green products or services for less than one year.
- Close to nine in ten (86%) SMEs selling green products or services say their **own country is their main market for these products in terms of annual turnover**. About one in six (18%) say that their main market consists of the Member States of the EU and /or the UK, Iceland, Liechtenstein, Norway and Switzerland.

For the largest share (43%) of SMEs selling green products and services, these products and services **make up not more than 10% of their most recent annual turnover**. About one in five (21%) reply that green products and services represent between 11% and 50% of their annual turnover and a slightly higher proportion (23%) answer that the sale of such products and services makes up more than 50% of their turnover.

Supporting green markets

Among SMEs that offer green products and services, 62% rely on their **own financial resources** and 56% on their **own technical expertise** for the production of these products or services. **Fewer of these SMEs rely on external support (24%).**

- Austria stands out with 47% of SMEs that rely on external support for the production of green products or services, followed by Spain (37%) and Czechia (31%).
- One in five of SMEs that rely on external support for the production of green products or services say they receive **public funding**, such as grants, guarantees or loans (+8 pp compared to 2017). Another one in five of these SMEs receive **private funding** from a bank, investment company or venture capital fund.

- The largest share (35%) of SMEs that rely on external support for the production of green products or services receive **advice or other non-financial assistance** from supply chain partners, followed by 23% that mention this type of support from business associations and clusters, and 21% from private consulting and audit companies.

Over four in ten (43%) SMEs selling green products or services answer that **financial incentives for developing products, services or new production processes** would help them the most in **expanding their green offer**. Financial incentives are much more likely to be mentioned than other forms of assistance.

- In 25 Member States, the largest share of SMEs selling green products or services say that financial incentives for developing products, services or new production processes would help their SME the most to expand their offer.
- While 13% of SMEs currently offering green products or services reply that none of the types of support would help them to expand their offer, among **SMEs not offering green products or services**, three times as many (39%) reply that none of the support measures would help them to **launch a range of green products or services**.

Employees in green jobs

A **'green job'** is one that **directly deals with information, technologies, or materials that preserve or restore environmental quality**. Just under four in ten SMEs surveyed have **at least one full-time employee working in a green job some or all of the time**: 33% say there are between one and five 'green' employees in their SME and 5% report that their number is higher than five. The results of the current survey show a small decrease in the proportion of SMEs with at least one 'green' employee.

- **Green SMEs** – i.e. those investing in resource efficiency, with a carbon reduction strategy in place and/or producing green goods or services – are more likely to have at least one full-time employee working in a green job some or all of the time.
- Although the average proportion of SMEs across the EU that has at least one green employee has decreased since 2017 (-4 pp), in a number of Member States, an opposite trend is seen. The largest increases are seen in Czechia (+19 pp, to 39%), Slovenia (+17 pp, to 44%), Lithuania (+15 pp, to 34%) and Bulgaria (+14 pp, to 36%).

Section 1. Going green and resource efficient

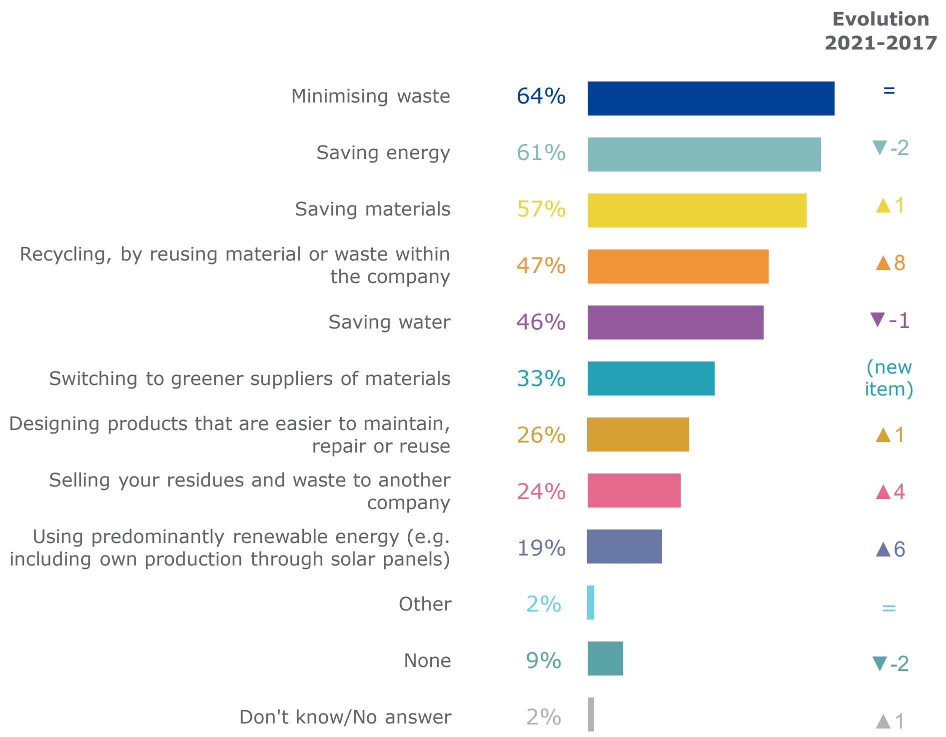
The first section of the report looks at the **actions that SMEs are currently undertaking** to be more resource efficient, as well the **additional measures** that SMEs plan to implement over the next two years. This is followed by an analysis of SMEs' **level of investment** in resource efficiency and a discussion whether SMEs have concrete **carbon reduction strategies** in place.

For the purpose of this survey, resource efficiency was defined as **using natural resources in a sustainable and environmentally-friendly manner, and this at different stages, from supply and production to, for example, waste management**.

1.1. Resource efficiency actions taken by SMEs

SMEs participating in this survey were presented with a list of nine actions that companies can take to be more resource efficient. The chart below shows that **most SMEs surveyed are taking measures to be more resource efficient**: 89% of SMEs are taking at least one of the actions listed in the survey, compared to 9% that are not taking any action and 2% that report that they 'do not know' if actions are being taken in their SME.

Q1 What actions is your company undertaking to be more resource efficient? (% EU27)



Base: all SMEs, EU27 (n=13 343 in 2021; 11 690 in 2017)
▼▲ Evolution 2021-2017 (comparison with Flash Eurobarometer 456, Sept. 2017)

The most common resource efficiency actions undertaken by SMEs are minimising waste (64%), saving energy (61%), saving materials (57%), recycling by reusing material or waste within their company (47%) and saving water (46%).

Compared to 2017 (Flash Eurobarometer 456), SMEs are now more likely to reuse material or waste within their company (47%, +8 pp), use predominantly renewable energy sources (19%, +6 pp) and sell their residues and waste (24%, +4 pp).

The table on the next page shows that there are substantial **differences in resource efficiency measures taken by SMEs across different NACE[4] sectors**. Focusing on the proportion of SMEs that are not taking any action, this proportion varies between 4% in the manufacturing sector and 18% in the sector of finance and insurance activities. This proportion is also higher in a few other **service sectors**: 15% in the information and communication sector and 15% in the real estate sector. In the sectors of accommodation and food service activities, and professional, scientific and technical activities, on the other hand, fewer SMEs report not taking any actions (5% and 7%, respectively). The proportion of SMEs not taking resource efficiency actions tends to be lower in **manufacturing and industry** – but this does not apply to all sectors in these groups: 13% of SMEs active in the supply of electricity, gas, steam and air conditioning and 17% of those in transportation and storage report not taking any action.

It was noted above that, due to their large number, the collective share of SMEs in total emissions is high, at 63% of all CO_2 emissions by companies. The size and relative share of SME emissions vary by sector, reflecting the difference in **CO_2 emission intensity by sector**. Manufacturing (436 million tons CO_2 emissions in the EU27 in 2018), electricity, gas, steam and air conditioning supply (284 million tons CO_2 emissions), and transportation and storage (262 million tons CO_2 emissions) are by far the highest emitting sectors. In contrast, service sectors tend to emit far less CO_2 (between 5 and 51 million tons CO_2 emissions).

In two of the three highest emitting NACE sectors, respondents in this survey are among the most likely to state that their SME is not taking any action to use resources more efficiently: 13% in electricity, gas, steam and air conditioning supply, and 17% in transportation and storage. In the manufacturing sector, the third of the highest emitting sectors, however, just 5% of SMEs reply that they are not taking action.

[4] Statistical classification of economic activities in the European Community, abbreviated as NACE, is the classification of economic activities in the European Union. For more information, see: https://ec.europa.eu/eurostat/web/nacerev2/overview

Q1 What actions is your company undertaking to be more resource efficient? (% by NACE sector, EU27)

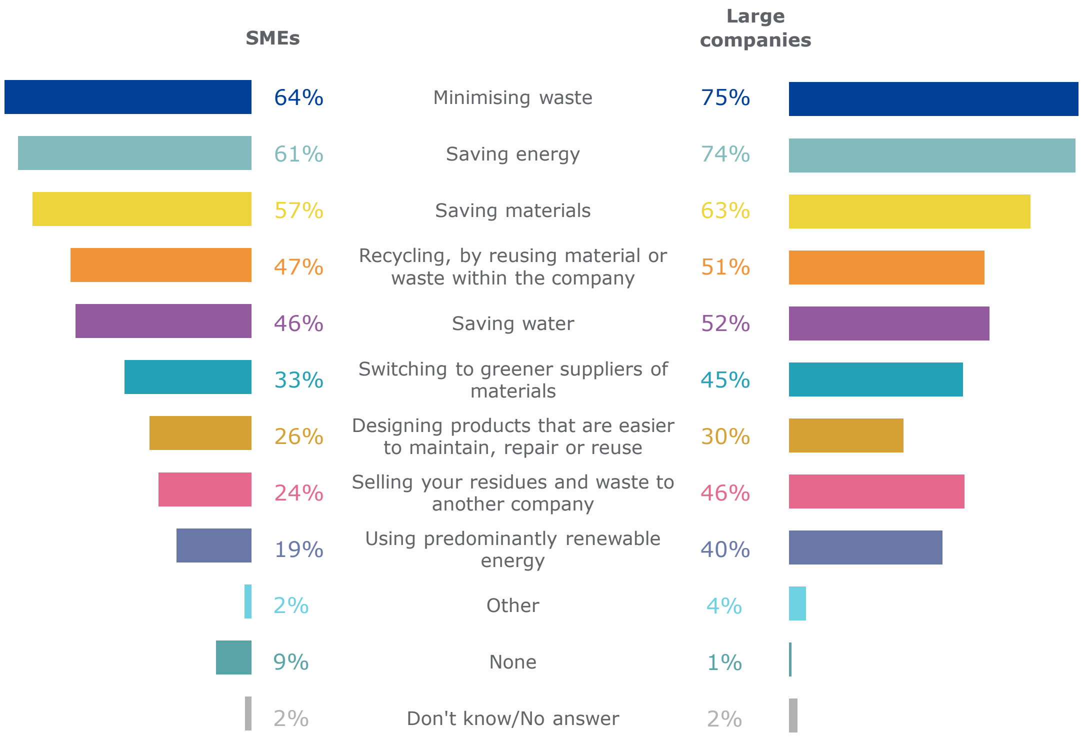
	Minimising waste	Saving energy	Saving materials	Recycling, by reusing material or waste within the company	Saving water	Switching to greener suppliers of materials	Designing products that are easier to maintain, repair or reuse	Selling your residues and waste to another company	Using predominantly renewable energy	Other	None	Don't know/No answer	CO_2 emissions, EU27, in million tons, 2018*
Manufacturing	73	67	64	50	47	34	36	39	17	1	5	1	**436**
Electricity, gas, steam and air conditioning supply	57	59	48	40	47	33	25	39	40	0	13	4	**284**
Transportation and storage	50	52	46	37	41	26	25	18	18	2	17	1	**262**
Construction	65	56	59	48	41	29	29	27	21	1	9	1	**54**
Wholesale & retail trade; repair of motor vehicles	66	60	57	49	48	35	26	24	18	1	7	2	**51**
Water supply; sewerage, waste and remediation	56	60	42	52	36	28	18	37	23	0	6	1	**19**
Mining and quarrying	43	42	42	52	33	15	25	12	9	8	10	13	**18**
Professional, scientific and technical activities	69	63	61	50	43	32	27	23	20	3	7	1	**16**
Accommodation and food service activities	71	70	64	49	63	44	30	27	22	0	5	2	**14**
Real estate activities	59	59	52	49	44	31	17	10	26	4	15	0	**6**
Information and communication	58	64	50	36	43	34	24	19	22	3	15	1	**5**
Financial and insurance activities	55	53	53	39	31	29	12	10	13	2	18	3	**NA**

Note: * Calculations based on Eurostat Structural Business Statistics and air emissions accounts.[5]
Base: all SMEs (n=13 343), EU27

[5] Calculations for 'financial and insurance activities' are not available. Source: Annual Report on European SMEs (forthcoming, European Commission)

As part of this survey, in addition to the 13 343 interviews across the EU with SMEs, 872 interviews were conducted with large companies (with 250 or more employees). **Comparing SMEs to large companies** shows that large companies are more likely to report that they are undertaking the resource efficiency actions listed in the survey. For example, while 61% of SMEs report saving energy, this figure increases to 74% for large companies. The biggest differences between SMEs and large companies are found for selling of residues and waste to another company (24% for SMEs vs 46% for large companies) and using of predominantly renewable energy (19% vs 40%, respectively).

Q1 What actions is your company undertaking to be more resource efficient?
(% SMEs and large companies, EU27)



Base: all SMEs (n=13 343) vs all large companies (n=872), EU27

In the table on the next page, the **difference between SMEs and large companies** is analysed in more depth by presenting the results for each of the four **large NACE sector groupings** separately:

- **Manufacturing:** companies engaged in the transformation of materials, substances or components into new products
- **Industry:** companies in (1) mining and quarrying, (2) electricity, gas, steam and air conditioning supply, (3) water supply; sewerage, waste and remediation, and (4) construction
- **Retail:** companies in the wholesale and retail trade (incl. repair of motor vehicles and motorcycles)

- **Services**: the service sector produces services (instead of goods), such as maintenance and repairs, training and consulting etc.

The biggest difference between SMEs and large companies in the proportions taking the resource efficiency action can be observed in the manufacturing and industry sectors. In manufacturing, for all but one of the measures listed in the survey, the proportion mentioning the action is between 7 percentage points and 23 percentage points lower for SMEs than for large companies. In industry, this also applies to all measures, expect to recycling – while 48% of SMEs in industry reply that they are recycling, by reusing material or waste in their company, this proportion is lower for large industrial companies in this sector (at 41%).

Q1 What actions is your company undertaking to be more resource efficient? (% SMEs and large companies, by NACE sector, EU27)

	Minimising waste	Saving energy	Saving materials	Recycling, by reusing material or waste within the company	Saving water	Switching to greener suppliers of materials	Designing products that are easier to maintain, repair or reuse	Selling your residues and waste to another company	Using predominantly renewable energy	Other	None	Don't know/No answer
Manufacturing												
SMEs	73	67	64	50	47	34	36	39	17	1	5	1
Large companies	80	81	72	58	60	49	38	62	33	0	1	2
Difference	+7	+13	+8	+8	+13	+16	+1	+23	+16	-1	-4	+1
Industry												
SMEs	62	55	56	48	41	29	28	27	21	2	10	2
Large companies	75	71	76	41	52	55	34	50	43	0	6	2
Difference	+13	+16	+19	-7	+11	+26	+7	+23	+21	-1	-3	=
Retail												
SMEs	66	60	57	49	48	35	26	24	18	1	7	2
Large companies	72	68	51	47	46	44	27	40	42	1	7	0
Difference	+6	+8	-6	-2	-2	+10	+1	+16	+25	-1	=	-1
Services												
SMEs	62	62	56	44	46	34	24	20	20	2	11	1
Large companies	71	73	53	50	48	35	20	28	44	1	6	4
Difference	+9	+11	-3	+6	+2	+2	-4	+8	+24	-1	-6	+3

Base: all SMEs (n=13 343) vs all large companies (n=872), EU27

It was noted above that, compared to SMEs, large companies (250+ employees) are more likely to report that they are undertaking the resource efficiency actions listed in the survey. It is important to note here that, in this comparison, the results for SMEs are mainly driven by those for micro companies (with less than ten employees) – this is because the vast majority of SMEs are micro companies. The analysis presented in the table on the next page shows that the difference between large companies and medium-sized SMEs (with between 50 and 249 employees) is much smaller for many of the resource efficiency actions considered in the survey.

The larger the SME in terms of **employees**, the more likely it is to be implementing most of the resource efficiency measures included in the survey. For example, while 61% of micro companies have taken actions to save energy, this proportion increases to 70% for medium-sized companies. Comparing smaller and larger SMEs in terms of **turnover in 2020**, a similar trend is only seen for selling residues and waste to another company (from 21% for SMEs with up to €100,000 turnover in 2020 to 29%-30% for SMEs with more than €2,000,000 or €10,000,000 in turnover).

SMEs established after 2020 appear more likely not to be taking action to be more resource efficient (18% vs 8%-9% of older SMEs) – it should, however, be added that only around 100 SMEs established after 2020 were interviewed and caution should be exercised when interpreting this finding. Moreover, for a number of measures, no difference is seen in SMEs' likelihood to have implemented these. For example, among both new and older companies, between 45% and 48% are recycling, by reusing material or waste within their company.

Finally, in line with the differences observed by NACE sector (discussed earlier in this section), SMEs that are only **selling services** are more likely than those **selling products** (or both products and services) not to be taking action to be more resource efficient (13% vs 5%-7%). The proportion having taken a specific action is lower for SMEs that only sell services, and this for all but one of the measures listed in the survey.

Q1 What actions is your company undertaking to be more resource efficient?
(% by business characteristics, EU27)

	Minimising waste	Saving energy	Saving materials	Recycling, by reusing material or waste within the company	Saving water	Switching to greener suppliers of materials	Designing products that are easier to maintain, repair or reuse	Selling your residues and waste to another company	Using predominantly renewable energy	Other	None	Don't know/No answer
EU27 (SMEs)	64	61	57	47	46	33	26	24	19	2	9	2
Company size												
1-9 employees	65	61	57	47	46	33	26	23	19	2	9	2
10-49 employees	63	64	55	46	44	36	27	34	25	1	7	1
50-249 employees	70	70	61	51	47	39	28	43	32	1	4	1
250+ employees	75	74	63	51	52	45	30	46	40	4	1	2
Company turnover in 2020												
Up to €100,000	62	59	57	45	47	33	26	21	16	2	10	1
€100,001-€500,000	68	63	61	48	45	33	27	20	22	2	7	1
€500,001-€2,000,000	66	62	57	49	46	36	27	33	19	1	8	1
€2,000,001-€10,000,000	74	63	55	45	45	32	28	30	23	2	5	2
More than €10,000,000	57	63	49	47	47	32	22	29	40	1	9	1
Sector of activity												
Manufacturing	73	67	64	50	47	34	36	39	17	1	5	1
Industry	62	55	56	48	41	29	28	27	21	2	10	2
Retail	66	60	57	49	48	35	26	24	18	1	7	2
Services	62	62	56	44	46	34	24	20	20	2	11	1
Company age (establishment year)												
Before 2014	64	61	57	48	46	32	25	25	19	1	9	2
Between 2014-2020	66	62	58	46	47	36	31	21	22	3	8	0
After 2020	53	42	52	45	35	21	24	12	21	2	18	0
Selling products/services												
Products	66	63	58	48	49	36	28	27	17	1	7	1
Services	61	59	53	42	42	30	20	18	21	2	13	2
Both	68	62	62	53	48	35	33	30	19	1	5	1

Base: all SMEs, EU27 (n=13 343) for all rows in the tables,
except row '250+ employees' (n=872)

Analysis by country

Three-quarters – or more – of respondents in Sweden (75%), Slovakia and Spain (both 78%) report that they are **saving energy** to be more resource efficient. In another 17 Member States, at least a slim majority of SMEs report the same. SMEs in Sweden – together with those in the Netherlands – are also the most likely in the EU to use **predominantly renewable energy** (43% and 45%, respectively). In most other countries, the proportion of SMEs using predominantly renewable energy remains below a quarter.

In Slovakia and Spain, at least seven in ten SMEs are **saving water** (73% and 70%, respectively); this proportion is 60% in Romania. In all other Member States, not more than half of SMEs report saving water to be more resource efficient (between 21% in Bulgaria and 50% in Hungary).

More than eight in ten SMEs in Spain and Slovakia (both 82%), and Italy and Sweden (both 85%), report that they are **minimising waste**. In another 12 Member States, more than half of respondents say the same. The proportion of SMEs that are **selling their residues and waste** to another company ranges from 8% in Ireland to 34% in Spain.

Respondents in Spain are also the most likely in the EU to say that their SME is **saving material** (84%); in Slovakia and Sweden, close to eight in ten respondents say the same (77%-79%). In another 13 Member States, between 51% and 67% of SMEs are saving materials. A slim majority of SMEs in Sweden and Spain are **switching to greener suppliers of materials** (51%-53%). The proportion of SMEs that are **recycling by reusing material and waste within their company** remains below 50% in most Member States; the most important exceptions are Sweden (67%) and Spain (76%).

Finally, the proportion of SMEs that are **designing products that are easier to maintain, repair or reuse** varies between 6% in Bulgaria and 43% in Sweden. Spain and Czechia are the closest to Sweden, with 35%-36% of SMEs that mention this action.

In about half of the Member States (13), the **largest share of SMEs** say they are minimising waste. In most of the remaining Member States (eight), the most popular resource efficiency measure is saving energy, and in three Member States (Estonia, Lithuania and Spain), saving material is mentioned by the largest share of SMEs. Finally, recycling, by reusing material and waste within the company, is the most popular response in two countries (Ireland and Portugal) and saving water is the most popular action in one country (Malta).

The proportion of SMEs that report **not taking any action to be more resource efficient** remains low in most Member States (e.g. 2% in Italy, 4% in Spain, 6% in Austria). In half of the Member States, there are at least 10% of SMEs that are not (yet) taking action; with the overall highest proportion observed in Estonia (23%), followed by Bulgaria and Poland (both 19%).

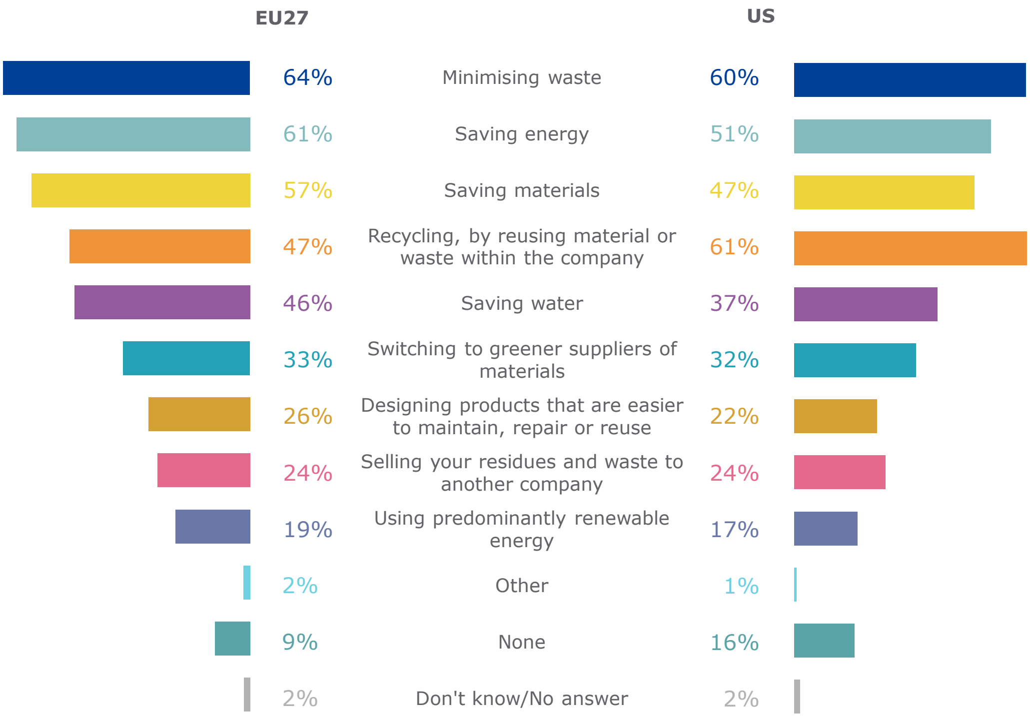
Q1 What actions is your company undertaking to be more resource efficient?
(% by country, EU27)

	Minimising waste	Saving energy	Saving materials	Recycling, by reusing material or waste within the company	Saving water	Switching to greener suppliers of materials	Designing products that are easier to maintain, repair or reuse	Selling your residues and waste to another company	Using predominantly renewable energy	Other	None	Don't know/No answer
EU27	64	61	57	47	46	33	26	24	19	2	9	2
BE	79	70	61	38	48	36	25	28	35	5	5	1
BG	30	37	27	19	21	8	6	14	4	6	19	3
CZ	70	56	51	45	43	31	35	26	10	1	12	0
DK	32	45	32	26	22	19	14	14	13	4	16	5
DE	57	69	54	50	43	34	25	27	31	2	14	1
EE	42	46	47	27	30	19	18	19	8	0	23	1
IE	50	38	21	52	29	29	17	8	12	1	9	4
EL	43	52	50	47	38	37	22	22	12	1	13	0
ES	82	78	84	76	70	53	36	34	18	1	4	0
FR	48	41	40	42	37	25	24	21	7	1	11	2
HR	59	51	47	33	40	24	25	21	6	0	11	1
IT	85	63	59	43	45	32	27	23	25	2	2	5
CY	34	56	44	43	37	22	10	10	18	0	16	0
LV	46	60	54	22	40	27	22	23	4	2	11	0
LT	49	57	63	15	46	35	21	27	10	3	8	0
LU	69	58	55	52	44	43	34	26	17	5	7	0
HU	58	68	61	35	50	29	27	25	17	2	7	1
MT	48	37	46	41	49	39	23	27	24	2	9	0
NL	70	63	60	53	36	35	32	25	45	2	7	1
AT	67	65	59	47	45	29	23	29	32	1	6	0
PL	53	57	55	32	45	25	17	21	9	1	19	0
PT	26	47	34	50	38	14	12	16	9	6	6	6
RO	69	66	67	40	60	38	31	26	9	1	13	0
SI	57	52	42	36	34	34	17	22	12	4	12	0
SK	82	78	77	53	73	44	34	26	8	0	3	0
FI	61	60	58	41	31	28	30	23	26	2	9	0
SE	85	75	79	67	48	51	43	23	43	1	5	0

Most-frequently selected response shown in green
Base: all SMEs, EU27 (n=13 343)

In 2017, it was noted that, compared to SMEs in the EU, **SMEs in the US** were more likely to be taking each of the resource efficiency actions listed in the survey. In the current survey, this no longer applies, and SMEs in the US are now less likely than those in the EU to undertake some of the actions listed in the survey, such as saving energy (51% in the US vs 61% in the EU) and saving materials (47% vs 57%). In line with the 2017 results, the proportion of SMEs that is recycling, by reusing material or waste within the company, nonetheless, remains higher in the US than in the EU (61% vs 47%).

Q1 What actions is your company undertaking to be more resource efficient?
(% EU27 vs US)



Base: all SMEs, EU27 (n=13 343), US (n=483)

As for the EU average results, the largest share – or joint largest share – of SMEs in **Iceland, Moldova, Montenegro, Norway, Serbia and the UK** report that they are minimising waste (between 43% in Montenegro and 87% in Norway). In **Turkey**, the largest share of SMEs is saving materials (74%). In the aforementioned countries, between 2% and 19% of SMEs are not taking any action to be more resource efficient; in **North Macedonia and Albania**, this proportion is much higher and is the most frequently given response (31% and 49%, respectively).

Caution should be exercised when interpreting the results of Albania, Moldova and Montenegro, due to the smaller number of interviews having been conducted in these countries (between 93 and 107 per country).

Q1 What actions is your company undertaking to be more resource efficient?
(% by country, non-EU countries)

	Minimising waste	Saving energy	Saving materials	Recycling, by reusing material or waste within the company	Saving water	Switching to greener suppliers of materials	Designing products that are easier to maintain, repair or reuse	Selling your residues and waste to another company	Using predominantly renewable energy	Other	None	Don't know/No answer
EU27	64	61	57	47	46	33	26	24	19	2	9	2
UK	75	63	54	74	46	47	26	17	18	1	5	0
TR	73	65	74	56	65	52	42	24	11	0	7	0
MK	16	22	11	11	8	8	8	25	8	2	31	0
ME	43	41	33	21	31	25	17	20	6	2	15	4
RS	44	44	38	26	28	19	17	28	7	1	16	0
AL	10	23	8	18	8	6	9	12	4	3	49	0
IS	64	50	59	54	22	22	21	28	28	1	10	0
NO	87	67	65	69	29	60	41	31	39	1	2	1
MD	58	54	47	21	52	23	18	13	7	0	19	0
US	60	51	47	61	37	32	22	24	17	1	16	2

Caution should be exercised when interpreting the results of Albania, Moldova and Montenegro, due to the smaller number of interviews having been conducted (between 93 and 107 per country).

Most-frequently selected response shown in green
Base: all SMEs, non-EU countries (n=3 200)

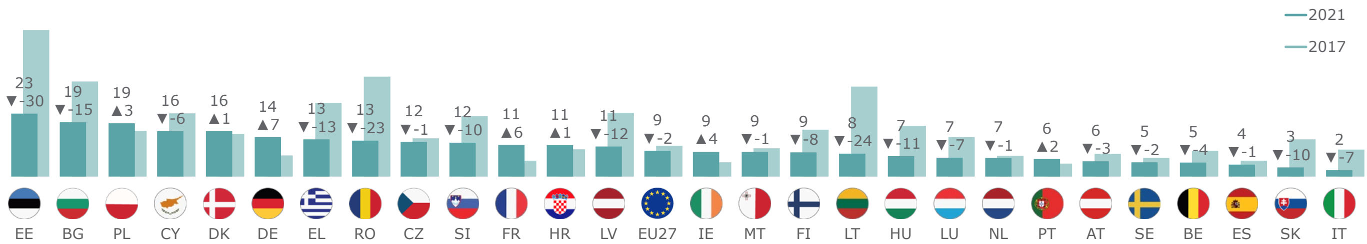
Trend compared to 2017

In the current survey, 89% of SMEs report that they are undertaking one or more resource efficiency measures, compared to 9% that are not undertaking any action in this regard. Compared to 2017, there is a small, but significant, decrease in the proportion of SMEs across the EU that are not taking any action to be more resource efficient (from 11% to 9%, -2 pp).

A **decrease in the proportion of SMEs that are not taking any resource efficiency measures** is also seen in a majority of the individual Member States. The largest decreases in this proportion are observed in Estonia (-30 pp, to 23%), Lithuania (-24 pp, to 8%), Romania (-23 pp, to 13%), Bulgaria (-15 pp, to 19%), Greece (-13 pp, to 13%) and Latvia (-12 pp, to 11%).

An opposite trend is observed in Germany and France; in these two countries, a small, but statistically significant increase is seen in the proportion of SMEs that are not taking any measures to be more resource efficient (+6 pp in France and +7 pp in Germany). It should, however, be added that, in France, the increase in this figure is only observed for micro SMEs. In Germany, on the other hand, the trend is seen for all SMEs, but there is also an increase in the proportion of SMEs that are taking 'many actions' – from 29% in 2017 to 45% in the current survey. In other words, there appear to be somewhat less SMEs in Germany that are taking action to be more resource efficient, but among those that are taking actions, there are more SMEs that are implementing multiple measures.

Q1 What actions is your company undertaking to be more resource efficient?
% "No actions", by country (2021 vs 2017)



Base: all SMEs, EU27 (n=13 343 in 2021; 11 690 in 2017)
▼▲ Evolution 2021-2017 (comparison with Flash Eurobarometer 456, Sept. 2017)

The table on the next page shows the **trend compared to 2017, at a country-by-country basis**. Blue values indicate a positive trend – i.e. an increase in the proportion of SMEs undertaking the action (or a decrease in the proportion of SMEs not undertaking any actions – last column in the table). Orange values indicate a negative trend – i.e. a decrease in the proportion of SMEs undertaking the action (or an increase in the proportion of SMEs not undertaking any actions).

The **evolution since 2017 looking at each of the individual resource efficiency measures** shows a more mixed picture. For all measures, there are both countries where the proportion undertaking the action has increased and countries where an opposite trend is seen. In line with the EU average results, however, for the actions of **using predominantly renewable energy sources**, **selling residues and waste** to another company, and **reusing material or waste** within the company, the trend in most countries shows an **increase in uptake** of the measure. For example, in 18 Member States, the proportion of SMEs that are recycling, by reusing material or waste within their company, has increased by five or more percentage points compared to 2017. The largest increases for this measure are observed in Spain (+19 pp), and Romania and Slovakia (both +18 pp).

In some countries, there is an **increase in the proportion of SMEs undertaking an action for all of the actions listed in the survey**. This is the case, for example, in Estonia, Romania and Lithuania. For these countries, the increase in uptake of the various measures also results in a large decrease in the proportion of SMEs not taking any action to become more resource efficient: Estonia (-30 pp, to 23%), Lithuania (-24 pp, to 8%), Romania (-23 pp, to 13%) – see also the figures on the previous page. A very different pattern is seen, for example, in Belgium. In this country, the result for most actions is similar across the two waves of the survey, except for the proportion using predominantly renewable energy, which increased by 15 percentage points compared to 2017.

The figures for Denmark, France, Ireland and Portugal, on the contrary, show **a decrease in uptake of the various measures** listed in the survey. It is important to add here that, although for most of the actions, there are now fewer SMEs in these countries that report having undertaken the action, in three of these countries (Denmark, Ireland and Portugal), there is **no significant increase in the proportion of SMEs that are not taking any action**. In other words, in the current survey, there are less SMEs that report taking multiple actions, but a similar share as in 2017 is undertaking at least one action to become more resource efficient. In France, on the other hand, there is a small, but significant, increase in the proportion of SMEs that are not taking any measures to be more resource efficient (+6 pp compared to 2017).

Q1 What actions is your company undertaking to be more resource efficient?
(% by country, 2021 vs 2017, EU27)

	Minimising waste	Saving energy	Saving materials	Recycling, by reusing material or waste within the company	Saving water	Designing products that are easier to maintain, repair or reuse	Selling your residues and waste to another company	Using predominantly renewable energy	None
EU27	0	-2	+1	+8	-1	+1	+4	+6	-2
BE	+4	0	-1	-2	+1	0	+3	+15	-4
BG	+2	+1	-4	+2	-8	-4	-2	0	-15
CZ	+6	-5	+4	+11	+1	+2	-3	+3	-1
DK	-17	-11	-20	-3	-18	-12	-13	+3	+1
DE	-3	-1	-3	+12	+8	+1	+4	-1	+7
EE	+33	+25	+31	+14	+21	+13	+13	+4	-30
IE	-35	-31	-37	-19	-30	-9	-18	-6	+4
EL	+6	0	+4	+17	+5	+3	-4	-1	-13
ES	+17	+6	+15	+19	+15	+4	+14	+11	-1
FR	-35	-30	-19	0	-30	-9	+3	+2	+6
HR	-5	-13	-15	+5	-10	+8	-6	-2	+1
IT	+11	+6	+7	+6	+1	+4	+7	+10	-7
CY	+5	+8	+14	-3	+9	+2	-4	+10	-6
LV	+11	+1	-1	+8	-4	+6	+13	+1	-12
LT	+28	+15	+30	+9	+11	+14	+12	+6	-24
LU	+12	+9	+2	+8	+14	+7	+1	+2	-7
HU	+18	+10	+16	+16	+10	+11	+4	+9	-11
MT	-14	-37	+12	-10	+19	+8	+7	+9	-1
NL	+5	-1	-2	+16	+4	+11	-1	+19	-1
AT	+7	-6	+7	0	+2	-9	+4	0	-3
PL	-2	0	-5	+8	-4	0	+1	+5	+3
PT	-29	-29	-41	-17	-26	-30	-8	0	+2
RO	+38	+34	+38	+18	+37	+25	+14	+4	-23
SI	+7	+4	-10	+3	-2	-9	+1	-4	-10
SK	+38	+20	+34	+18	+28	+20	+11	+3	-10
FI	+6	+9	+5	+10	+5	+7	+4	+12	-8
SE	+9	+17	+14	+6	+12	+11	-3	+8	-2

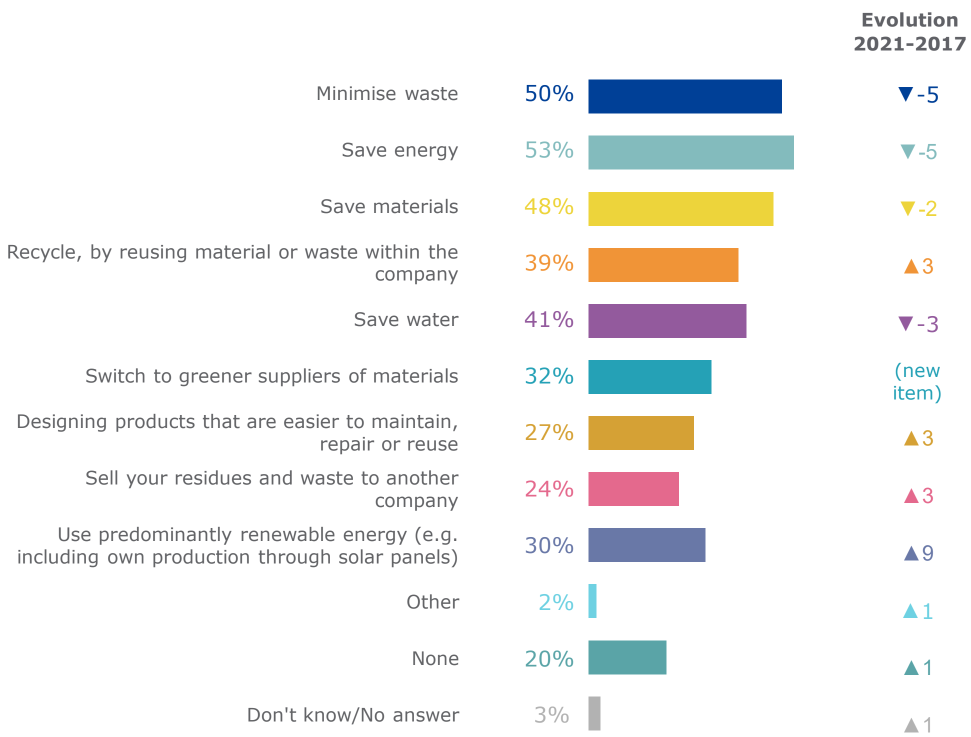
Base: all SMEs, EU27 (n=13 343 in 2021; 11 690 in 2017)
▼▲ Evolution 2021-2017 (comparison with Flash Eurobarometer 456, Sept. 2017)

1.2. Resource efficiency actions planned for the next two years

As noted in the previous section, a large majority of SMEs are already implementing a range of resource efficiency actions. Respondents in this survey were next asked which **additional resource efficiency actions their SME is planning to implement over the next two years**.

A slim majority of SMEs (53%) plan to implement (further) **energy savings** in the next two years and 30% are looking to switch to use **predominantly renewable energy sources** (including e.g. own production trough solar panels). One in two SMEs will implement (further) measures to **reduce waste** and 24% of SMEs reply that they will **sell their residues and waste** to another company. Almost one in two SMEs (48%) are looking to implement (further) actions to **save materials** and about a third (32%) want to **switch to greener suppliers of materials**. About four in ten SMEs (39%) are planning to recycle, by **reusing material or waste** within their company. Finally, 27% of SMEs plan to **design products that are easier to maintain, repair or reuse**.

Q2 Over the next two years, what are the additional resource efficiency actions that your company is planning to implement? (% EU27)



Base: all SMEs, EU27 (n=13 343 in 2021; 11 690 in 2017)
▼▲ Evolution 2021-2017 (comparison with Flash Eurobarometer 456, Sept. 2017)

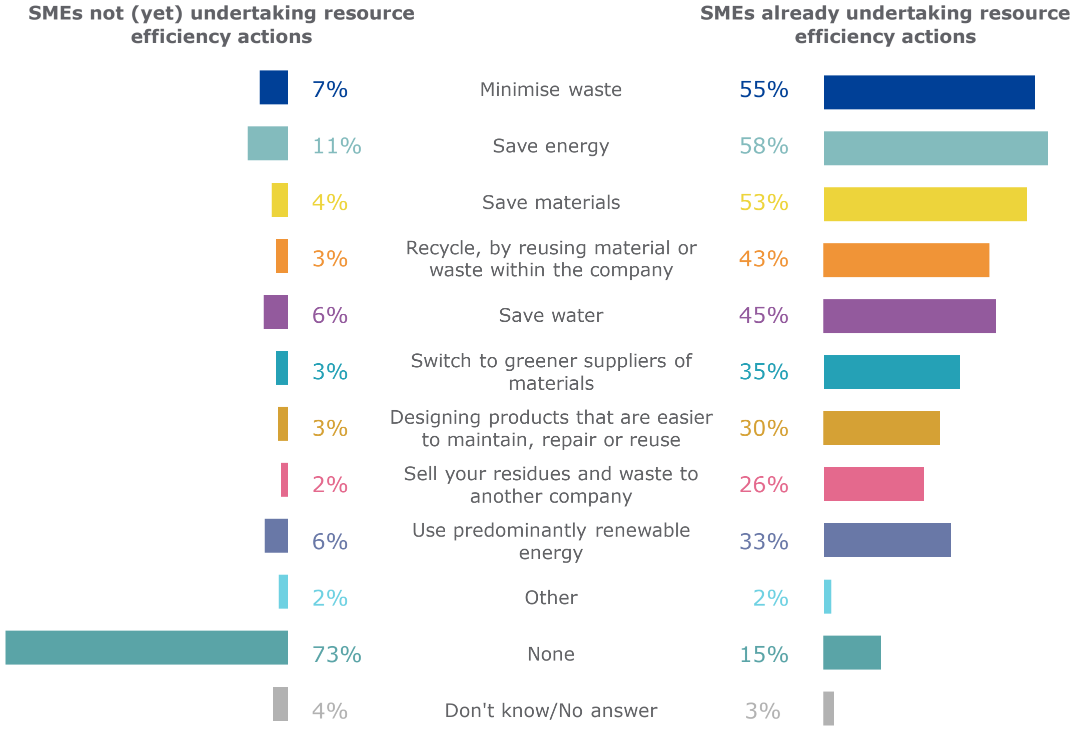
Compared to 2017, and in line with the trend observed for resource efficiency actions already undertaken, there are now more SMEs that say they will take additional measures in the next two years to use predominantly renewable energy sources (+9 pp), sell their residues and waste (+3 pp) and reuse material or waste within their company (+3 pp). The proportions of SMEs that plan to implement additional measures to minimise waste (-5 pp), save energy (-5 pp) or energy (-3 pp) have decreased compared to 2017.

The following figure compares intentions to implement resource efficiency actions over the next two years for SMEs that are not yet undertaking such actions (9% of all SMEs – see previous section) and those already undertaking resource efficiency actions (89% of SMEs).

A large majority (83%) of SMEs that are **already undertaking resource efficiency actions** are planning to implement additional actions over the next two years – for example, 55% plan to minimise waste and 26% will look into selling their residues and waste to another company. Among these SMEs, 15% reply that they are not planning any additional resource efficiency actions in the next two years.

Among SMEs **not yet taking resource efficiency actions**, however, more than seven in ten (73%) say that they also do not plan to implement any such actions in the next two years. Just under a quarter (23%) of these SMEs are planning to start with the implementation of resource efficiency actions – for example, 11% will implement measures to save energy and 6% to save water.

Q2 Over the next two years, what are the additional resource efficiency actions that your company is planning to implement? (% SMEs already taking actions vs SMEs not taking actions, EU27)



Base: SMEs already undertaking resource efficiency actions (n=12 211) and SMEs not undertaking resource efficiency actions (n=1 006), EU27

As is the case for resource efficiency actions that SMEs are currently undertaking, **medium-sized companies** are the most likely to be planning to undertake additional actions in the next two years. For example, 58% are planning to save energy, compared to 53% of micro companies. Similarly, 34% of medium-sized companies are planning to sell their residues and waste to another company, compared to 23% of micro companies.

The proportion of SMEs that are not planning to undertake additional resource efficiency actions in the next two years does not seem to vary much by these SMEs' **turnover in 2020** – between 18% and 21% across all categories are not planning additional actions. In terms of individual actions, the largest differences are seen for planning to use predominantly renewable energy (from 28% for SMEs with up to €100,000 turnover in 2020 to 42% for those with a turnover value in 2020 of between €2,000,001 and €10,000,000)

Compared to older SMEs, those **established after 2020** are about two times more likely to reply that they will not undertake additional resource efficiency actions in the next two years (39% vs 19%-20% of older SMEs). As noted in the previous section, given that only about 100 SMEs established after 2020 were interviewed, caution should be exercised when interpreting this finding.

The proportion of SMEs that will not undertake any additional resource efficiency actions is the lowest in the **manufacturing sector** (15% compared to 18% in the retail sector and 22% in both the industry sector and services sector). In terms of individual actions, the largest differences are seen for plans to sell residues and waste to another company (35% in manufacturing SMEs vs 21% for those in the services sector).

Finally, SMEs that are only **selling services** are more likely than those **selling products** (or both products and services) to indicate that no plans have been made to implement additional resource efficiency actions (24% vs 16%-19%, respectively).

Q2 Over the next two years, what are the additional resource efficiency actions that your company is planning to implement? (% by business characteristics, EU27)

	Minimise waste	Save energy	Save materials	Recycle, by reusing material or waste within the company	Save water	Switch to greener suppliers of materials	Designing products that are easier to maintain, repair or reuse	Sell your residues and waste to another company	Use predominantly renewable energy	Other	None	Don't know/No answer
EU27 (SMEs)	50	53	48	39	41	32	27	24	30	2	20	3
Company size												
1-9 employees	50	53	48	39	41	32	28	23	30	2	20	3
10-49 employees	49	55	47	39	40	32	26	27	36	3	19	3
50-249 employees	53	58	48	40	41	37	27	34	40	3	15	3
250+ employees	58	65	55	45	48	46	32	34	49	5	10	4
Company turnover in 2020												
Up to €100,000	51	53	49	39	44	34	27	21	28	2	21	3
€100,001-€500,000	54	57	51	40	41	33	32	24	30	2	20	2
€500,001-€2,000,000	50	55	48	41	40	32	27	28	33	2	18	2
€2,000,001-€10,000,000	50	53	49	39	44	29	24	24	42	2	21	1
More than €10,000,000	46	57	38	40	43	31	28	24	37	2	19	4
Sector of activity												
Manufacturing	55	58	57	43	43	33	35	35	33	2	15	2
Industry	48	46	46	41	36	29	27	24	30	2	22	3
Retail	52	55	48	43	44	36	29	23	30	2	18	3
Services	49	55	47	35	41	31	25	21	31	2	22	3
Company age (establishment year)												
Before 2014	51	54	48	39	42	31	26	24	30	2	20	3
Between 2014-2020	49	54	49	40	40	37	33	24	33	2	19	3
After 2020	39	33	34	28	20	11	20	20	27	4	39	5
Selling products/services												
Products	51	53	48	40	42	36	29	24	29	2	19	3
Services	46	52	46	34	38	28	24	17	29	2	24	3
Both	56	56	51	45	44	34	31	32	33	2	16	3

Base: all SMEs, EU27 (n=13 343) for all rows in the tables,
except row '250+ employees' (n=872)

Analysis by country

The proportion of SMEs that plan to implement (further) **energy savings** in the next two years ranges from 19% in Portugal to 86% in Spain. In 15 Member States, this action is the most frequently mentioned future action; in Spain, this measure holds the joint highest rank with planning to **save materials**. In the remaining countries, the proportion of SMEs that are looking to implement (further) actions to save materials varies between 10% in Portugal and 73% in Slovakia.

In eight Member States, the largest share of SMEs will implement (further) measures to **reduce waste**; this applies, for example, to Sweden and Slovakia, where, respectively, 70% and 78% of SMEs mention this measure. In Ireland, Denmark and Malta, on the other hand, less than one in five SMEs will take additional measures in the next two years to minimise waste (between 13% and 17%).

Compared to their counterparts in other countries, SMEs in Belgium and Sweden are the most likely to say that, in the next two years, they want to take action to **predominantly use renewable energy** (50% and 52%, respectively). In Malta, the largest share of respondents (28%) reply that they plan to use predominantly renewable energy (other measures are selected by between 8% and 21% of SMEs in this country).

The proportion of SMEs that have **not planned to implement additional resource efficiency measures** in the next two years varies between 4% in Spain and 45% in Denmark. In Germany, Finland and Estonia, more than a third of respondents will not take additional resource efficiency measures (between 34% and 36%).

Q2 Over the next two years, what are the additional resource efficiency actions that your company is planning to implement? (% by country, EU27)

	Minimise waste	Save energy	Save materials	Recycle, by reusing material or waste within the company	Save water	Switch to greener suppliers of materials	Designing products that are easier to maintain, repair or reuse	Sell your residues and waste to another company	Use predominantly renewable energy	Other	None	Don't know/No answer
EU27	50	53	48	39	41	32	27	24	30	2	20	3
BE	60	59	50	39	48	44	31	34	50	4	18	1
BG	24	28	27	13	17	12	5	10	9	1	29	4
CZ	62	56	50	42	41	32	35	28	26	3	19	1
DK	15	24	14	14	9	11	10	9	11	6	45	5
DE	32	46	34	29	26	23	19	18	30	5	34	3
EE	31	38	35	23	23	19	18	18	13	1	36	1
IE	13	24	23	21	10	19	13	9	14	5	9	7
EL	47	62	48	44	40	44	27	22	29	0	13	0
ES	83	86	86	78	73	66	43	45	45	2	4	0
FR	48	42	37	36	38	26	26	19	16	1	13	4
HR	50	49	41	34	38	25	25	21	28	2	16	1
IT	44	51	49	34	42	20	30	15	33	1	28	3
CY	31	49	37	33	30	31	14	18	38	0	21	0
LV	46	59	55	22	43	30	27	29	21	2	13	1
LT	52	61	60	19	53	37	25	29	27	1	14	0
LU	28	32	20	24	23	19	22	17	18	10	22	2
HU	48	59	47	27	42	32	28	21	35	4	16	2
MT	17	21	14	17	11	21	8	8	28	14	28	9
NL	43	44	37	33	26	26	25	22	40	1	31	5
AT	50	53	43	39	31	13	22	26	29	1	20	12
PL	49	51	47	30	43	25	19	22	20	1	25	3
PT	27	19	10	14	9	16	10	9	22	6	13	11
RO	73	76	72	56	67	65	45	47	43	1	13	1
SI	46	44	33	28	29	35	14	20	25	4	24	2
SK	78	77	73	54	74	49	37	35	32	0	8	1
FI	37	42	34	29	21	21	21	20	22	3	35	2
SE	70	68	61	55	43	46	43	23	52	1	11	3

Most-frequently selected response shown in green
Base: all SMEs, EU27 (n=13 343)

In **Montenegro and Serbia**, SMEs are the most likely to say that they will take additional measures to save energy in the next two years (51% and 43%, respectively). In **the UK, Norway and the US**, the most popular additional resource efficiency measure is minimising waste (selected by 66%, 58% and 51%, respectively) and in **Turkey**, it is saving materials (selected by 71%). In **Moldova**, 51% of SMEs answer that they will implement additional measures to save water; other measures are selected by fewer respondents in this country.

In **North Macedonia, Iceland and Albania**, on the other hand, the largest share of respondents have no plans to implement additional resource efficiency actions in the next two years (31%, 37% and 59%, respectively).

Q2 Over the next two years, what are the additional resource efficiency actions that your company is planning to implement? (% by country, non-EU countries)

	Minimise waste	Save energy	Save materials	Recycle, by reusing material or waste within the company	Save water	Switch to greener suppliers of materials	Designing products that are easier to maintain, repair or reuse	Sell your residues and waste to another company	Use predominantly renewable energy	Other	None	Don't know/No answer
EU27	50	53	48	39	41	32	27	24	30	2	20	3
UK	66	62	50	59	41	49	26	22	34	1	15	3
TR	69	65	71	58	65	59	47	32	27	0	9	3
MK	12	22	8	8	8	5	7	12	19	5	31	6
ME	38	51	38	14	44	24	21	19	34	0	24	0
RS	34	43	31	28	27	22	16	25	23	1	20	3
AL	14	17	14	5	8	1	7	10	12	0	59	4
IS	27	28	25	30	10	19	13	15	22	3	37	1
NO	58	51	46	56	35	53	42	31	38	11	13	4
MD	45	47	46	23	51	37	20	21	32	1	11	5
US	51	47	43	51	38	29	28	25	22	6	25	4

Caution should be exercised when interpreting the results of Albania, Moldova and Montenegro, due to the smaller number of interviews having been conducted (between 93 and 107 per country).

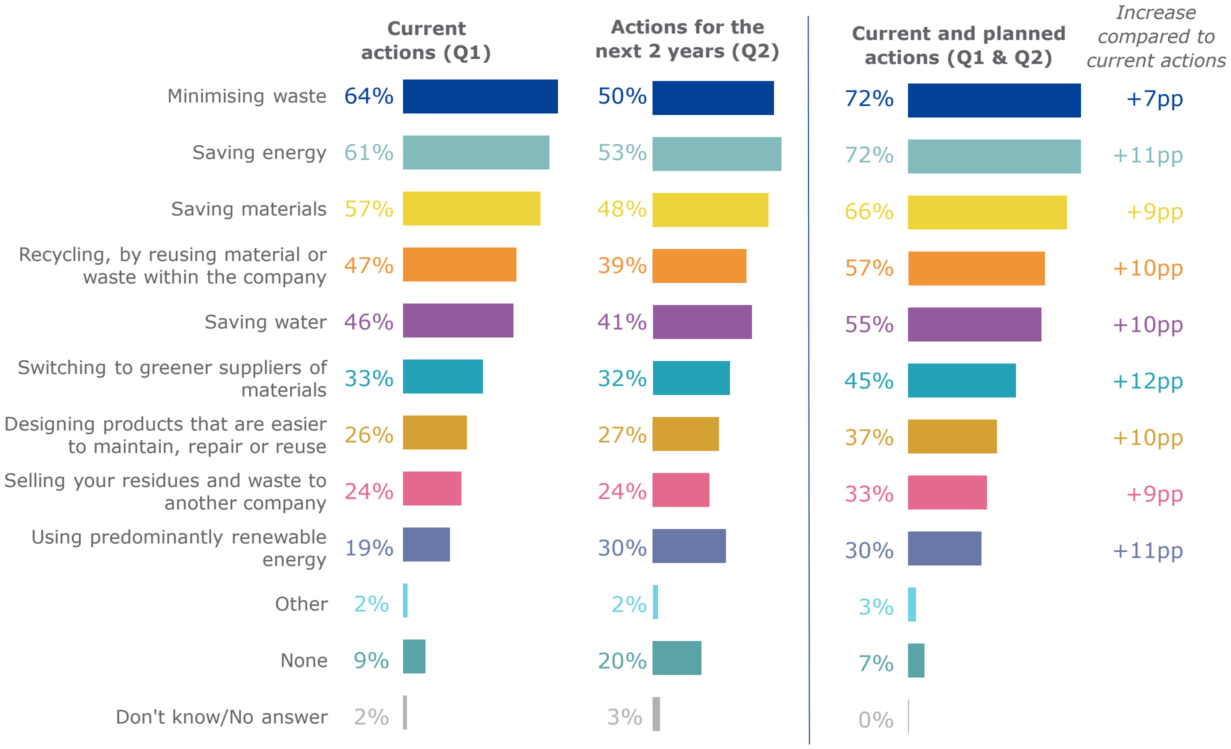
Most-frequently selected response shown in green
Base: all SMEs, non-EU countries (n=3 200)

Current and planned resource efficiency actions

In the next figure, the results for the question about current resource efficiency actions taken by SMEs and that about additional resource efficiency measures to be implemented in the next two years are combined. By combining the results of these questions, **a picture is presented of the total number of SMEs that will be taking each of the resource efficiency actions in two years' time** (bar chart at the right-hand side in the figure below).

For example, 64% of SMEs reply that they are currently taking measures to minimise waste and 50% say that, in the next two years, they will either start minimising waste, or will implement additional measures to reduce waste in their company. In two years' time, this means that there will be, in total, 72% of SMEs that are reducing waste. This figure of 72% represents an increase of seven percentage points compared to the proportion of SMEs currently already minimising waste in their company.

Q1 What actions is your company undertaking to be more resource efficient?
Q2 Over the next two years, what are the additional resource efficiency actions that your company is planning to implement? (% - EU27)



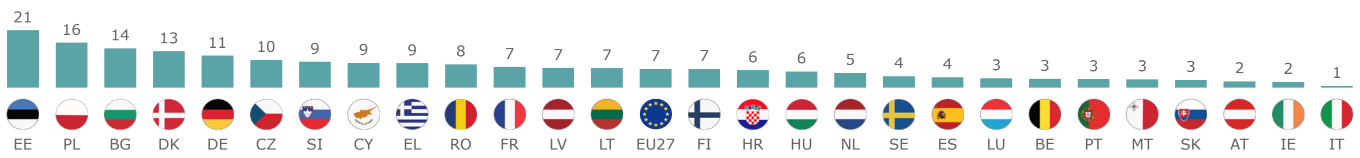
Base: all SMEs (n=13 343), EU27

Around one in ten (9%) SMEs reply that they are not undertaking any of the resource efficiency actions listed in the survey. Of these SMEs, just under a quarter are planning to start with the implementation of one or more resource efficiency actions in the next two years. This means that, **in two years' time, there will be 7% of SMEs remaining that do not undertake resource efficiency actions**. The proportion of **SMEs that are not currently taking measures to be more resource efficient and**

that also do not plan to start implementing measures in the next two years is somewhat higher in the industry and services sectors (8%-9% vs 3%-5% in the manufacturing and retail sectors).

The proportion of SMEs that are not currently taking resource efficiency measures and do not plan to start doing so varies between 1% in Italy and 21% in Estonia. Other countries at the higher end of the country ranking include: Denmark (13%), Bulgaria (14%) and Poland (16%).

Q1 What actions is your company undertaking to be more resource efficient?
Q2 Over the next two years, what are the additional resource efficiency actions that your company is planning to implement? **% "No actions" (currently and not planning to implement)**, by country



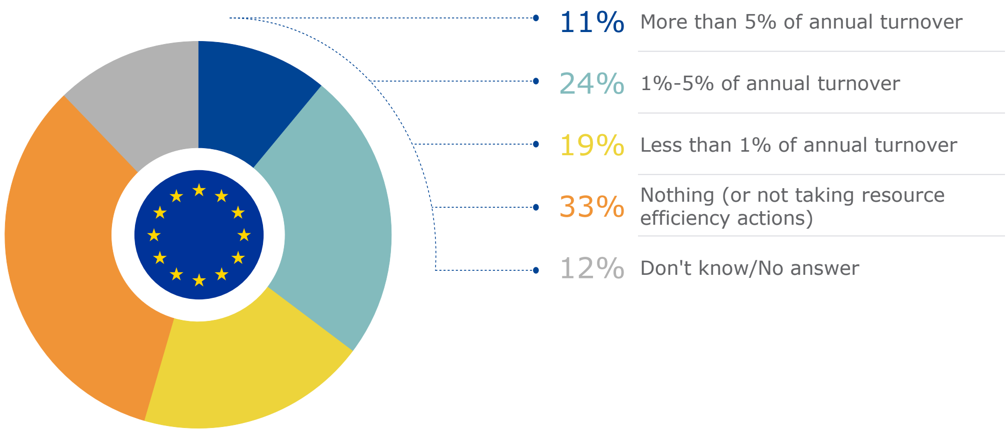
Base: all SMEs (n=13 343), EU27

1.3. Investment in resource efficiency

One way to study how resource efficient SMEs are, is by asking about the type of resource efficiency measures being implemented by these SMEs (nine of this type of measures were discussed in the previous sections). An alternative way is to ask SMEs how much they have invested (on average, par year) to become more resource efficient.

All SMEs that reported taking resource efficiency actions, were asked **how much they have invested, on average per year, and this over the past two years, to be more resource efficient**. In the analysis below, the results are presented taking into account all SMEs (Note: the analysis assumes that SMEs that are not taking resource efficiency actions also have not made investments to be more resource efficient).

Q4 Over the past two years, how much have you invested on average per year to be more resource efficient? (% EU27)

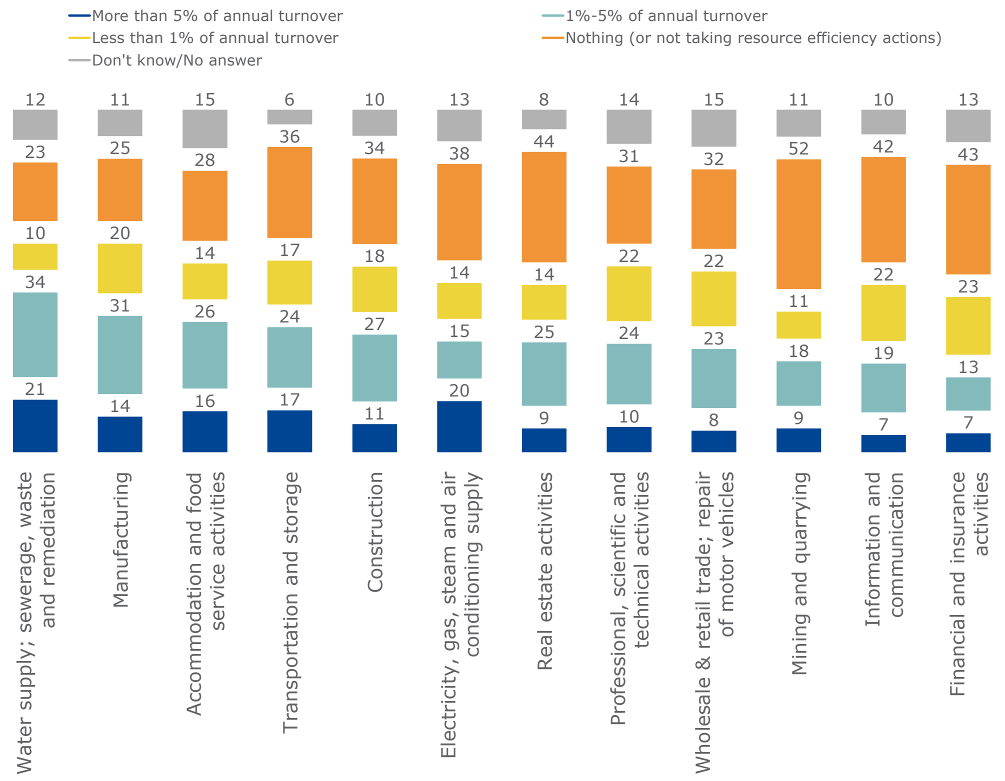


Base: all SMEs, EU27 (n=13 343), EU27

Of the SMEs surveyed across the EU, 11% reply that they have invested, on average, more than 5% of their annual turnover over the past two years to become more resource efficient and 24% say that the investment amounted to between 1% and 5% of their annual turnover, on average. About one in four (19%) SMEs say that the investment in resource efficiency was less than 1% of their annual turnover and 33% reply that nothing was invested (or that no resource efficiency actions are being taken). Finally, 12% of SMEs reply that they do not know how much was invested in resource efficiency measures in the past two years.

An analysis by **NACE sector** shows that between 7% of SMEs in the financial and insurance sector and 21% of those active in the sector of water supply, sewerage, waste and remediation reply that they have invested, on average, more than 5% of their annual turnover over the past two years to become more resource efficient. Similarly, the proportion having invested between 1% and 5% of annual turnover is the lowest in the financial and insurance sector (13%) and the highest in the sector of water supply, sewerage, waste and remediation (34%).

Q4 Over the past two years, how much have you invested on average per year to be more resource efficient? (% by NACE sector, EU27)



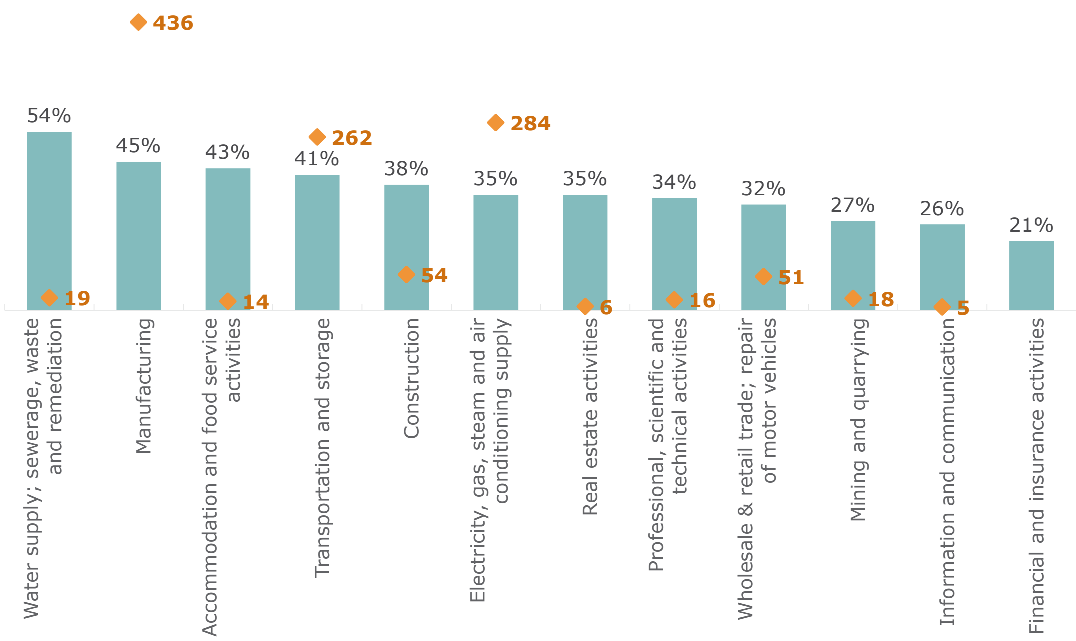
Base: all SMEs (n=13 343), EU27

In the chart below, for each NACE sector, the proportion of SMEs having invested at least 1% of their annual turnover on resource efficiency measures, per year, and this over the past two years, is set against the **CO_2 emission intensity of the sector**.

It was noted in the first section of this report that the size and relative share of SME emissions vary by NACE sector, reflecting the difference in CO_2 emission intensity by sector. The CO_2 emission of the manufacturing sector in the highest (436 million tons CO_2 emissions in the EU27 in 2018), but SMEs in this sector are also among the most likely to report having invested at least 1% of their annual turnover on resource efficiency measures over the past two years. SMEs in information and communication, on the other hand, are among the least likely to report having made investments in resource efficiency, but the total CO_2 emissions of this sector is also the lowest overall (5 million tons CO_2 emissions in the EU27 in 2018).

Q4 Over the past two years, how much have you invested on average per year to be more resource efficient? (EU27)
% SMEs surveyed investing "1% or more of annual turnover", by NACE sector

*Orange values: CO_2 emissions, EU27, in million tons, 2018**



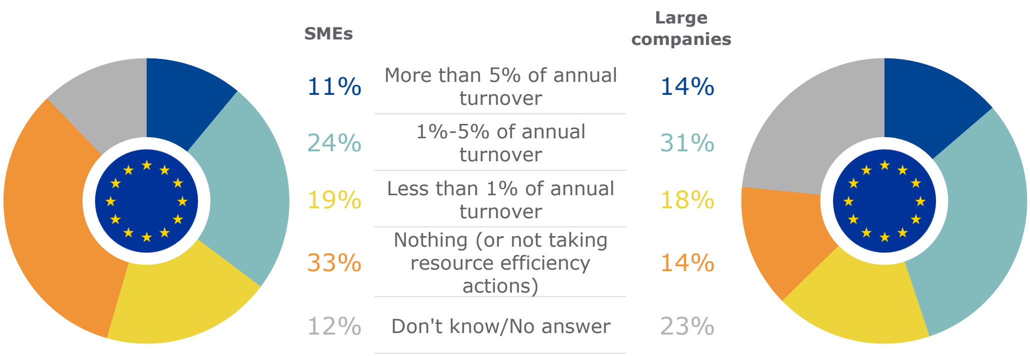
Note: * Calculations based on Eurostat Structural Business Statistics and air emissions accounts.[6]
Base: all SMEs (n=13 343), EU27

[6] Calculations for 'financial and insurance activities' are not available. Source: Annual Report on European SMEs (forthcoming, European Commission)

While 11% of SMEs reply that they have invested, on average, more than 5% of their annual turnover over the past two years to become more resource efficient, this proportion increases to 14% for **large companies**. Similarly, 24% of SMEs, compared to 31% of large companies, say that the investment amounted to between 1% and 5%, on average, of their annual turnover.

Among SMEs, 33% reply that nothing was invested (or that no resource efficiency actions are being taken); this figure is 14% for large companies. It should, however, also be noted that there is a larger degree of uncertainty among respondents in large companies with 23% saying that they do not know how much was invested in resource efficiency measures in the past two years; this proportion is lower for SMEs (12%).

Q4 Over the past two years, how much have you invested on average per year to be more resource efficient? (% SMEs and large companies, EU27)



Base: all SMEs (n=13 343) vs all large companies (n=872), EU27

Smaller SMEs (in terms of **number of employees**) are more likely to reply that, over the past two years, no resource efficiency investments were made (or that no resource efficiency actions are being undertaken): from 34% for micro companies to 15% for medium-sized companies. The proportion of SMEs in this situation also decreases with **turnover** – from 37% of SMEs with a turnover of less than €100,000 in 2020 down to 15% for SMEs with more than €10,000,000 in turnover.

In line with the results discussed so far (on resource efficiency actions being undertaken), it can also be observed that:

- **SMEs established after 2020** are more likely to reply that no resource efficiency investments were made or that no resource efficiency actions are being taken (42% vs 33% of older SMEs).
- SMEs that are only **selling services** are more likely than those **selling products** (or both products and services) not to have invested or having taken actions (37% vs 29%-31%).
- **Manufacturing** SMEs, on the other hand, are the least likely not to have invested or having taken actions: 25% compared to 32% in the retail sector, 35% the industry sector and 36% in the services sector.

Q4 Over the past two years, how much have you invested on average per year to be more resource efficient? (% by business characteristics, EU27)

	More than 5% of annual turnover	1%-5% of annual turnover	Less than 1% of annual turnover	Nothing (or not taking resource efficiency actions)	Don't know /No answer
EU27 (SMEs)	11	24	19	33	12
Company size					
1-9 employees	11	24	19	34	12
10-49 employees	12	30	22	23	14
50-249 employees	12	33	22	15	18
250+ employees	14	31	18	14	23
Company turnover in 2020					
Up to €100,000	11	25	20	37	6
€100,001-€500,000	14	25	21	33	8
€500,001-€2,000,000	9	28	22	29	11
€2,000,001-€10,000,000	11	29	19	25	16
More than €10,000,000	17	27	31	15	10
Sector of activity					
Manufacturing	14	31	20	25	11
Industry	12	25	17	35	11
Retail	8	23	22	32	15
Services	11	23	19	36	12
Company age (establishment year)					
Before 2014	11	25	19	33	12
Between 2014-2020	13	24	20	33	11
After 2020	6	5	11	42	35
Selling products/services					
Products	10	24	21	31	14
Services	10	23	19	37	10
Both	13	26	19	29	13

Base: all SMEs, EU27 (n=13 343) for all rows in the tables,
except row '250+ employees' (n=872)

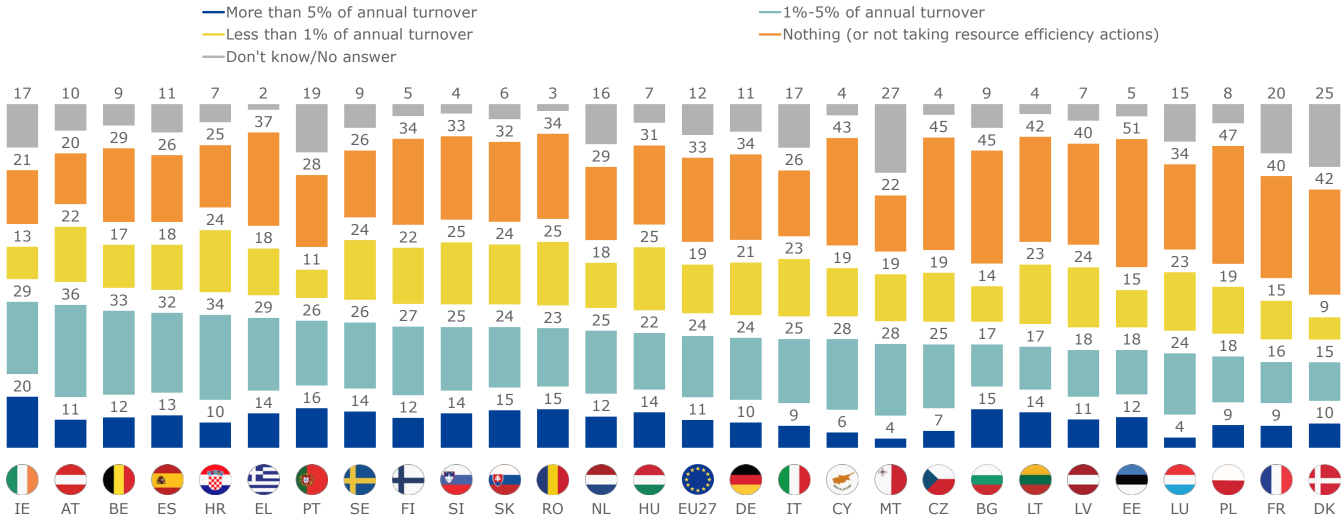
Analysis by country

The proportion of SMEs having made **resource efficiency investments of 5% or more** of their annual turnover, on an annual basis, over the past two years ranges from 4% in Luxembourg and Malta, to 20% in Ireland. In a majority of the Member States, at least one in ten SMEs have invested at least 5% of their annual turnover, over the past two years, to be more resource efficient.

The proportion of SMEs investing between 1% and 5% is the lowest in Denmark (15%) and the highest in Austria (36%). The **total proportion of SMEs that have invested at least 1% of their annual turnover** (the sum of the dark and light blue bars in the chart below), on average, over the past two years varies between 25% in Denmark and 49% in Ireland. Other countries where at least 40% of SMEs have invested at least 1% of their annual turnover are Austria, Belgium, Croatia, Greece, Portugal, Spain and Sweden.

The largest shares of SMEs that have **not made any investment in resource efficiency** (or are not undertaking any action to become more resource efficient) are observed in Estonia (51%), Poland (47%), and Bulgaria and Czechia (both 45%).

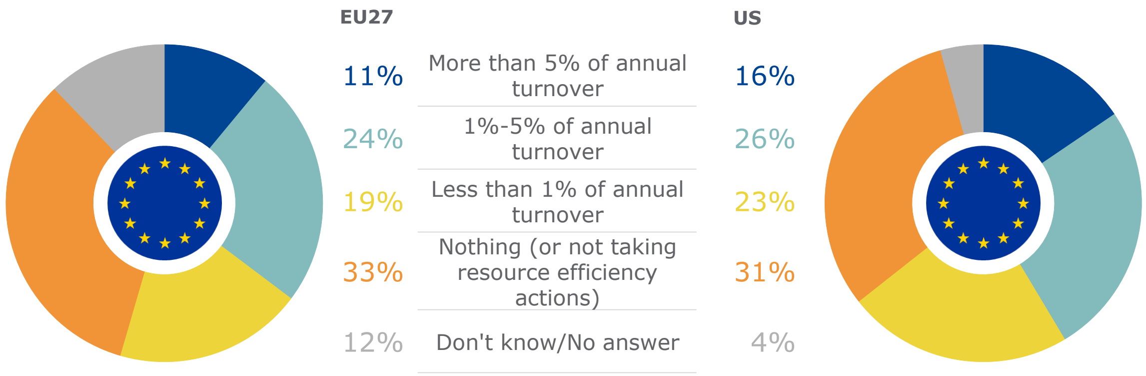
Q4 Over the past two years, how much have you invested on average per year to be more resource efficient? (% by country, EU27)



Base: all SMEs, EU27 (n=13 343)

In the EU, 11% of SMEs reply that they have invested, on average, more than 5% of their annual turnover over the past two years to become more resource efficient. **In the US**, this figure is somewhat higher at 16%. There is, however, no significant difference in the proportions of SMEs in the EU and the US that have invested less than 1% of their annual turnover or that are not investing at all in resource efficiency measures.

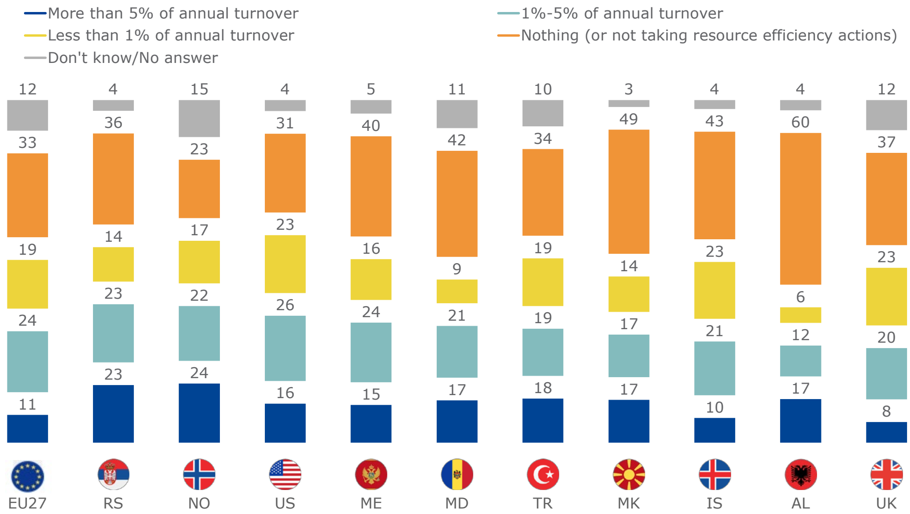
Q4 Over the past two years, how much have you invested on average per year to be more resource efficient? (% EU27 vs US)



Base: all SMEs, EU27 (n=13 343), US (n=483)

In **the UK**, 16% of SMEs reply that they have invested, on average, more than 5% of their annual turnover over the past two years to become more resource efficient and 20% say that the investment amounted to between 1% and 5%, on average, of their annual turnover. Although the UK is ranked lowest looking at the proportion of SMEs that have invested at least 1% of their annual turnover (the sum of the dark and light blue bars in the chart below), SMEs in some of the other non-EU countries are more likely than those in the UK not to have made any investment in resource efficiency (or not to have undertaken any action to be become resource efficient): 37% in the UK, compared to, for example, 49% in **North Macedonia** and 60% in **Albania**.

Q4 Over the past two years, how much have you invested on average per year to be more resource efficient? (% by country, non-EU countries)



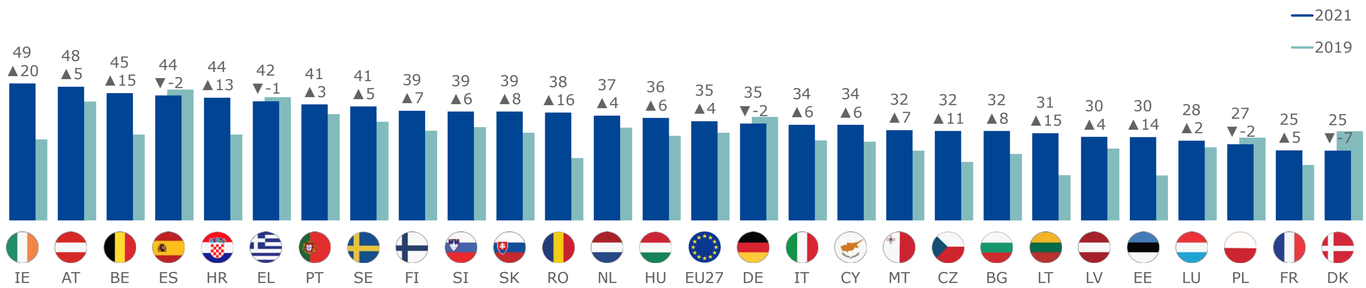
Caution should be exercised when interpreting the results of Albania, Moldova and Montenegro, due to the smaller number of interviews having been conducted (between 93 and 107 per country).

Base: all SMEs, non-EU countries (n=3 200)

Trend compared to 2017

The chart below presents the trend compared to 2017 in the proportion of SMEs that have **invested at least 1% of their annual turnover** on resource efficiency measures, per year, over the past two years. On average, across the EU, this proportion has increased to 35% (+4 pp compared to 2017).

Q4 Over the past two years, how much have you invested on average per year to be more resource efficient?
% "1% or more of annual turnover", by country (2021 vs 2017)



Base: all SMEs, EU27 (n=13 343 in 2021; 11 690 in 2017)
▼▲ Evolution 2021-2017 (comparison with Flash Eurobarometer 456, Sept. 2017)

It was noted in the first section that, in a majority of the Member States, the proportion of SMEs that are not taking any resource efficiency measures has decreased since 2017. In line with this, in a majority of the Member States, there is **an increase, compared to 2017, in the proportion of SMEs that have invested at least 1% of their annual turnover on resource efficiency measures in the past two years**. The largest increases in this proportion are observed in Ireland (+20 pp, to 49%), Romania (+16 pp, to 38%), Belgium (+15 pp, to 45%), Lithuania (+15 pp, to 31%), Estonia (+14 pp, to 30%) and Croatia (+13 pp, to 44%).

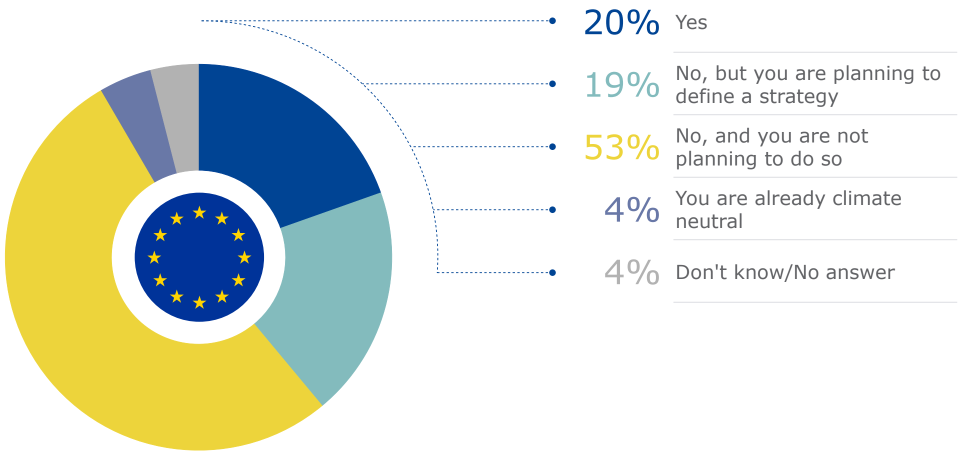
1.4. Strategy to become climate neutral or negative

A new question in this Flash Eurobarometer asked respondents if their SME has a concrete strategy in place to reduce their carbon footprint and become climate neutral or negative.

A vast majority of SMEs (72%) do not (yet) have a **concrete strategy in place to reduce their carbon footprint and become climate neutral or negative**. Some of the SMEs in this group, however, are planning to define a strategy.

The chart below shows that 20% of SMEs have a concrete strategy in place to reduce their carbon footprint and become climate neutral or negative and 4% report that they are already climate neutral. Another 19% of SMEs reply that they do not have a carbon reduction strategy in place but are planning to define one. A slim majority (53%) of respondents answer that their SME does not have a concrete strategy in place to reduce their carbon footprint and is also not planning to define one. About one in twenty (4%) respondents reply that they do not know if a strategy has been defined or will be defined.

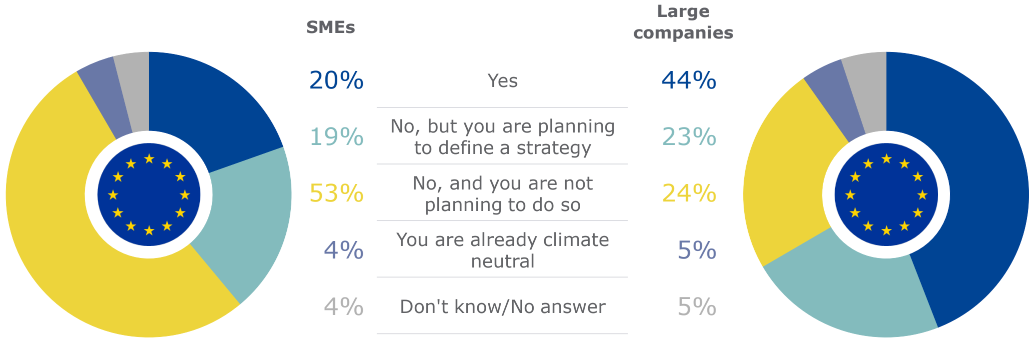
Q14 Does your company have a concrete strategy in place to reduce your carbon footprint and become climate neutral or negative? (% EU27)



Base: all SMEs, EU27 (n=13 343)

In line with the results discussed so far in this chapter, respondents in **large companies** are more likely to report that their company has a carbon reduction strategy in place (44% vs 20% for SMEs). Moreover, while a slim majority of SMEs have no plans to define a carbon reduction strategy, this proportion is more than two times lower for large companies (24%).

Q14 Does your company have a concrete strategy in place to reduce your carbon footprint and become climate neutral or negative? (% SMEs and large companies, EU27)



Base: all SMEs (n=13 343) vs all large companies (n=872), EU27

The larger the SME (in terms of **number of employees)**, the more likely it is to have a concrete strategy in place to reduce their carbon footprint and become climate neutral or negative (from 19% among micro companies to 34% for medium-sized companies). When comparing SMEs looking at their **turnover in 2020**, the largest difference is seen between SMEs with a turnover of more than €10,000,000 and those with lower turnover values. Among the former, 48% have a carbon reduction strategy in place; among SMEs with lower turnover values, between 18% and 21% have a concrete strategy in place.

SMEs in **manufacturing** are overall the least likely to have a carbon reduction strategy in place (15%), while those in the industry sector are the most likely to have such a strategy (23%). Among SMEs **selling both products and services**, 22% reply that they have a concrete strategy in place to reduce their carbon footprint; among SMEs only selling services, this proportion is 18%.

Finally, SMEs established between 2014 and 2020 are somewhat more likely to report that they are planning to define a strategy to become climate neutral (24% vs 22% for SMEs established after 2020 and 18% of those established before 2014); there is no significant difference in the proportions already having a strategy in place.

Q14 Does your company have a concrete strategy in place to reduce your carbon footprint and become climate neutral or negative? (% by business characteristics, EU27)

	Yes	No, but you are planning to define a strategy	No, and you are not planning to do so	You are already climate neutral	Don't know /No answer
EU27 (SMEs)	20	19	53	4	4
Company size					
1-9 employees	19	20	54	4	4
10-49 employees	24	20	47	4	5
50-249 employees	34	24	34	3	5
250+ employees	44	23	24	5	1
Company turnover in 2020					
Up to €100,000	18	17	57	4	4
€100,001-€500,000	18	20	56	4	2
€500,001-€2,000,000	21	21	50	5	3
€2,000,001-€10,000,000	19	28	46	6	2
More than €10,000,000	48	13	34	4	2
Sector of activity					
Manufacturing	15	20	56	6	3
Industry	23	17	53	5	3
Retail	18	21	52	4	5
Services	21	19	53	4	4
Company age (establishment year)					
Before 2014	20	18	54	4	4
Between 2014-2020	19	24	49	5	3
After 2020	23	22	49	3	4
Selling products/services					
Products	20	19	51	5	5
Services	18	17	57	4	4
Both	22	23	49	3	3

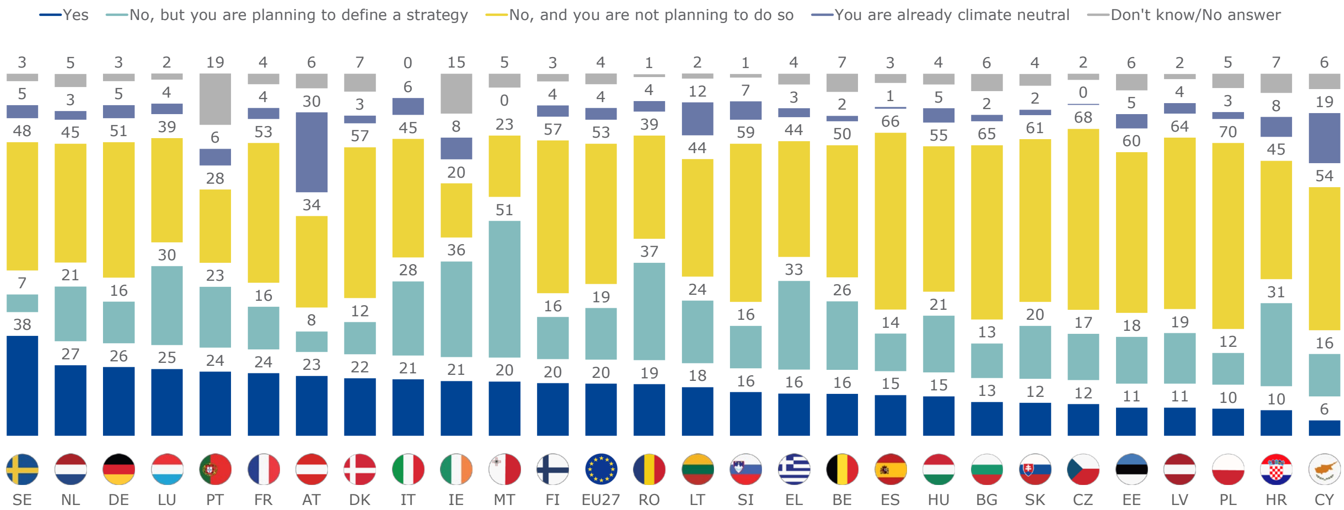
Base: all SMEs, EU27 (n=13 343) for all rows in the tables, except row ‘250+ employees’ (n=872)

Analysis by country

The proportion of SMEs with **a concrete strategy in place to reduce their carbon footprint** and become climate neutral or negative varies between 6% in Cyprus and 38% in Sweden. In half of the EU Member States, at least one in five SMEs report having such a strategy in place. SMEs could also reply that they are **already climate neutral**, but across most Member States, not more than 5% of SMEs say this is the case. The most important exception is Austria, where 30% of SMEs surveyed reply that they are already climate neutral.[7]

The proportion of SMEs that do not yet have a carbon reduction strategy in place, but that are **planning to define one**, also varies across countries. In Croatia, SMEs are among the least likely to already have a carbon reduction strategy in place, but they are among the most likely to reply that they are planning to define such a strategy (31%). This proportion is even higher in Greece (33%), Ireland (36%), Romania (37%) and Malta (51%).

Q14 Does your company have a concrete strategy in place to reduce your carbon footprint and become climate neutral or negative? (% by country, EU27)

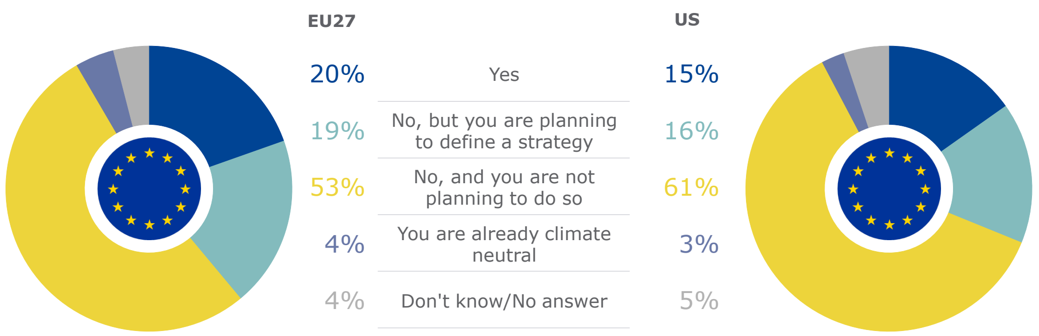


Base: all SMEs, EU27 (n=13 343)

[7] In October2021, Austria announced tax measures that include a phased-in tax on carbon emissions, which will see CO_2 emissions taxed from July 2022 onwards.

In the EU27, 20% of SMEs reply that they have a concrete strategy in place to reduce their carbon footprint and another 19% are planning to define such a strategy; **among SMEs in the US**, these figures are somewhat lower (15% and 16%, respectively).

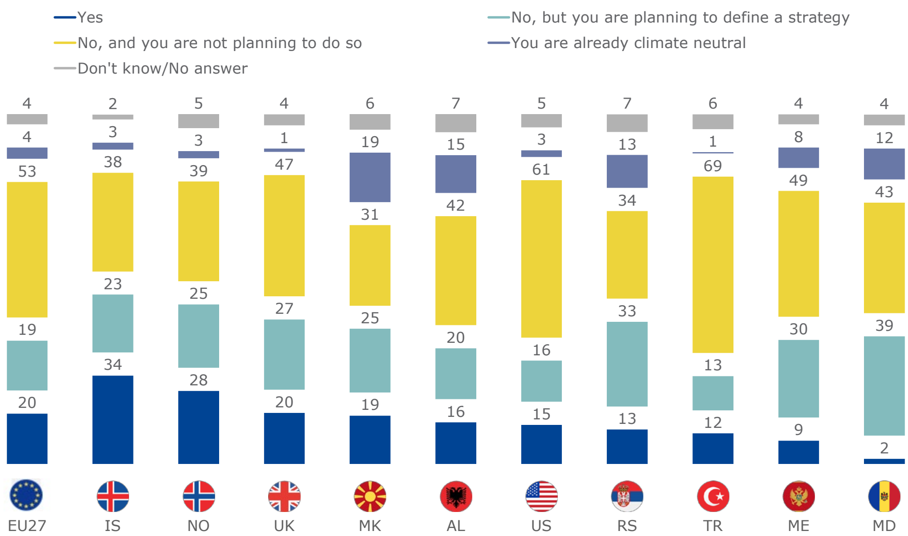
Q14 Does your company have a concrete strategy in place to reduce your carbon footprint and become climate neutral or negative? (% EU27 vs US)



Base: all SMEs, EU27 (n=13 343), US (n=483)

In **Norway** and **Iceland**, more than a quarter of SMEs reply that a carbon reduction strategy is in place at their company (28% and 34%, respectively). In **Moldova** and **Montenegro**, less than one in ten respondents give this response; nonetheless, at least three in ten SMEs in these countries are planning to define a strategy (30% in Montenegro and 39% in Moldova). The proportion of SMEs not having any plans to define a strategy to become climate neutral is the highest in **Turkey** (69%).

Q14 Does your company have a concrete strategy in place to reduce your carbon footprint and become climate neutral or negative? (% by country, non-EU countries)



Caution should be exercised when interpreting the results of Albania, Moldova and Montenegro, due to the smaller number of interviews having been conducted (between 93 and 107 per country).

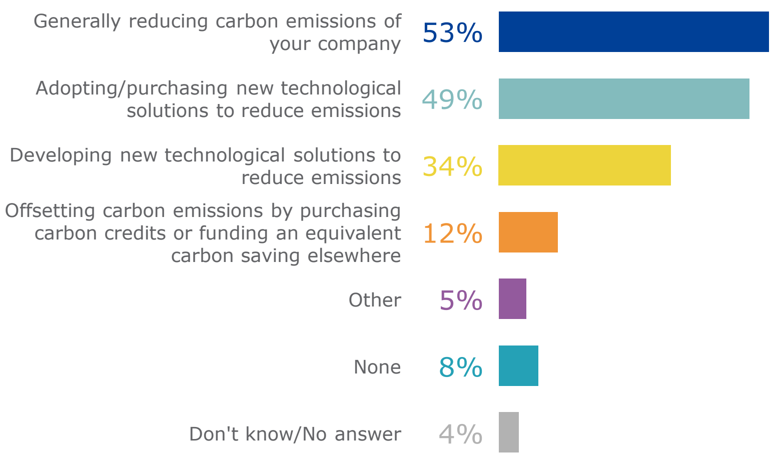
Base: all SMEs, non-EU countries (n=3 200)

Measures to become climate neutral

SMEs with a concrete strategy in place to reduce their carbon footprint were next asked which **actions they are undertaking to become climate neutral**; they were presented with a list of four actions.

A slim majority of these SMEs (53%) reply that they are **generally reducing carbon emissions** in their company (e.g. by using recycled resources and sustainable suppliers, by switching to online events, by using public transport for business trips etc.). About one in two (49%) say they are **adopting or purchasing new technological solutions** to reduce emissions and roughly one in three (34%) are **developing new technological solutions themselves**. Finally, 12% of these SMEs say that they are offsetting carbon emissions, by purchasing carbon credits or funding an equivalent carbon saving elsewhere.

Q15 What actions is your company undertaking to be become climate neutral? (% EU27)



Base: SMEs with a concrete strategy in place to reduce their carbon footprint (n=2 930), EU27

For each of the climate neutrality actions listed in the survey, the larger the company (in terms of **number of employees**), the more likely they are to reply the action is being taken. For example, 33% of micro companies with a concrete carbon reduction strategy, say they are developing new technological solutions to achieve carbon neutrality; this figure increases to 40% for medium-sized companies and 50% for large companies.

When comparing SMEs looking at their **turnover in 2020**, the largest differences are seen between SMEs with a turnover of more than €10,000,000 and those with lower turnover values. For example, 58% of the former type of SMEs say their strategy to become climate neutral is based on adapting or purchasing new technological solutions; among SMEs with lower turnover values, this proportion varies between 48% and 51%.

SMEs in the **retail sector** are less likely than their counterparts in other sectors to say that their strategy to become climate neutral is based on adopting or purchasing new technological solutions (37% vs 53%-54% in the other sectors) or on developing such solutions (30% vs 42% in the manufacturing sector). SMEs in the retail sector, together with those in **industry**, are somewhat more likely to reply that they are offsetting carbon emissions by purchasing carbon credits or funding equivalent carbon saving elsewhere (both 14% vs 10% in the services sector and 4% in manufacturing).

SMEs that are **selling services, or services and products**, are more likely than those that are selling products to reply that their strategy for carbon reduction is focused on a general reduction of carbon emissions in their SME (55%-57% vs 43%) and on adopting or purchasing new technological solutions to reduce emissions (52% vs 39%).

Q15 What actions is your company undertaking to be become climate neutral? (% by business characteristics, EU27)

	Generally reducing carbon emissions of your company	Adopting/ purchasing new techno-logical solutions to reduce emissions	Developing new techno-logical solutions to reduce emissions	Offsetting carbon emissions	Other	None	Don't know/No answer
EU27 (SMEs)	53	49	34	12	5	8	4
Company size							
1-9 employees	52	48	33	11	6	8	3
10-49 employees	56	56	36	16	4	5	3
50-249 employees	62	54	40	18	3	5	3
250+ employees	70	65	50	15	6	3	1
Company turnover in 2020							
Up to €100,000	48	51	36	14	5	6	3
€100,001-€500,000	56	50	31	9	9	5	2
€500,001-€2,000,000	56	48	32	9	5	10	7
€2,000,001-€10,000,000	41	50	33	11	4	3	1
More than €10,000,000	70	58	54	12	3	3	1
Sector of activity							
Manufacturing	51	54	42	4	7	5	2
Industry	58	53	33	14	5	8	2
Retail	49	37	30	14	9	10	4
Services	53	53	35	10	3	7	5
Company age (establishment year)							
Before 2014	52	49	34	11	6	8	4
Between 2014-2020	56	50	32	12	1	8	3
After 2020*	45	65	49	2	7	16	0
Selling products/services							
Products	43	39	36	10	5	9	7
Services	57	52	33	14	3	7	3
Both	55	52	33	10	8	8	3

Note: * results based on less than 50 interviews
Base: SMEs with a concrete strategy in place to reduce their carbon footprint, EU27 (n=2 930) for all rows in the tables, except row '250+ employees' (n=397)

Section 2. Barriers to and support for going green

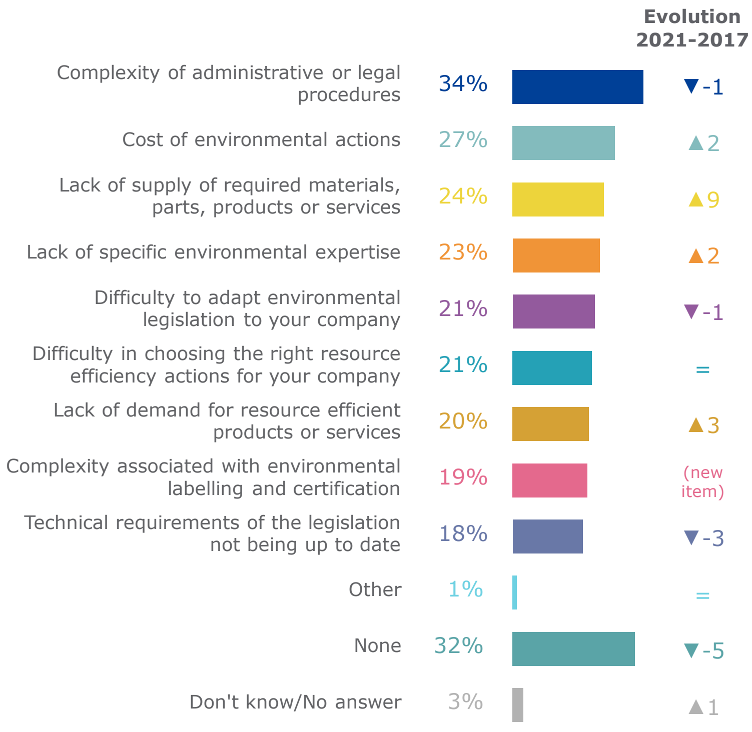
The second chapter of this report looks first at **potential barriers** for SMEs to going green and resource efficient, such as an **increase in production costs** and lack of expertise. The second part reviews the **types of support** SMEs rely on when taking actions to be more resource efficient, and in particular the types of external support they use. The chapter ends with a discussion of the type of **assistance SMEs consider most effective** in helping them to be more resource efficient.

2.1. Difficulties setting up resource efficiency actions

SMEs that are undertaking resource efficiency actions were asked if they encountered any difficulties setting up these actions. They were presented with a list of nine potential difficulties.

About one in three (34%) SMEs undertaking resource efficiency actions, say they encountered **complex administrative or legal procedures setting up these actions** and 27% refer to the cost of environment actions. For the remaining difficulties, between 18% and 24% mention it as a barrier they encountered when setting up resource efficiency actions; for example, 21% of SMEs undertaking resource efficiency actions, say it was difficult to choose the right actions for their company and 23% experienced difficulties due to a lack of specific environmental expertise.

Q7 Did your company encounter any of the following difficulties when trying to set up resource efficiency actions? (% EU27)



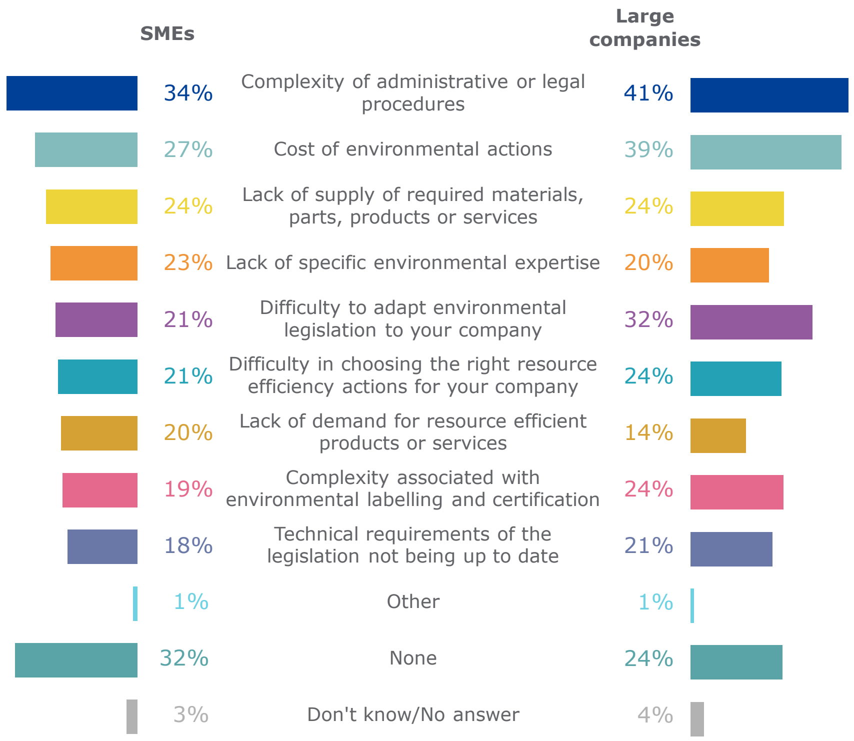
Base: SMEs undertaking resource efficiency actions, EU27 (n=12 107 in 2021; 10 099 in 2017)
▼▲ Evolution 2021-2017 (comparison with Flash Eurobarometer 456, Sept. 2017)

About one in three (32%) SMEs undertaking resource efficiency actions, reply that they **did not encounter any difficulties** when setting up these actions. The proportion of SMEs that did not experience any difficulties has decreased **compared to 2017** (-5 pp). In the current survey, SMEs are also considerably more likely to report that they were hindered in their resource efficiency efforts by **a lack of supply of the required materials, parts, products or services** (24%, +9 pp).

For most of the difficulties listed in the survey, **large companies** are more likely than SMEs to reply they encountered difficulties when setting up resource efficiency actions. For example, 32% of large companies, compared to 21% of SMEs, say they encountered difficulties to adapt environmental legislation to their company's situation. On the other hand, large companies are less likely to say they did not encounter any of the difficulties listed in the survey (24% vs 32% of SMEs).

SMEs are more likely than large companies to have encountered difficulties in setting up resource efficiency actions due to a lack of specific environmental expertise (23% vs 20%) and due to a lack of demand for resource efficient products or services (20% vs 14%). Finally, SMEs are as likely as large companies to have encountered difficulties due to a lack of supply of the required materials, parts, products or services (both 24%).

Q7 Did your company encounter any of the following difficulties when trying to set up resource efficiency actions? (% SMEs and large companies, EU27)



Base: SMEs undertaking resource efficiency actions (n=12 107) vs large companies undertaking resource efficiency actions (n=827), EU27

Larger SMEs (in terms of number of employees) are less likely to have experienced difficulties when trying to set up resource efficiency actions. Among medium-sized companies undertaking resource efficiency actions, 26% reply that they **did not encounter any difficulties** when setting up these actions; this figure increases to 32% for micro companies. When comparing SMEs in terms of their **turnover in 2020**, the largest difference is seen between SMEs with a turnover of more than €10,000,000 and those with lower turnover values. Among the former, 25% did not encounter any difficulties when setting up resource efficiency actions; among SMEs with lower turnover values, this proportion is between 30% and 35%.

SMEs in the **manufacturing and industry sectors** are also somewhat less likely than their counterparts in the retail and services sectors to have experienced difficulties when trying to set up resource efficiency actions (29%-30% vs 32%-34%). A similar difference is seen when comparing SMEs that **sell product vs those that sell services**. Among SMEs selling services and undertaking resource efficiency actions, 36% reply that they did not encounter any difficulties when setting up these actions; this figure is lower for SMEs that are selling products (30%) or selling both products and service (27%).

Across all types of SMEs, **complex administrative or legal procedures** are the most frequently mentioned type of difficulty encountered when setting up resource efficiency actions. For example, this barrier is mentioned by 36% of medium-sized companies (undertaking resource efficiency actions), 34% of SMEs in the industry sector and 39% of SMEs that are selling both services and products.

Q7 Did your company encounter any of the following difficulties when trying to set up resource efficiency actions? (% by business characteristics, EU27)

	Complexity of administrative or legal procedures	Cost of environmental actions	Lack of supply of required materials, parts, products or services	Lack of specific environmental expertise	Difficulty to adapt environmental legislation to your company	Difficulty in choosing the right resource efficiency actions for your company	Lack of demand for resource efficient products or services	Complexity associated with environmental labelling and certification	Technical requirements of the legislation not being up to date	Other	None	Don't know/No answer
EU27 (SMEs)	34	27	24	23	21	21	20	19	18	1	32	3
1-9 employees	34	26	24	23	21	21	20	19	18	1	32	3
10-49 employees	33	29	23	22	22	21	18	21	19	1	30	4
50-249 employees	36	31	25	23	25	22	19	22	20	1	26	5
250+ employees	41	39	24	20	32	24	14	24	21	1	24	4
Up to €100,000	32	26	25	24	22	19	21	18	19	1	32	2
€100,001-€500,000	37	28	26	26	24	25	23	20	20	1	30	1
€500,001-€2,000,000	39	28	24	22	22	23	19	26	23	1	32	2
€2,000,001-€10,000,000	36	28	15	22	21	16	17	19	15	0	35	2
More than €10,000,000	40	25	24	15	16	20	11	25	23	1	25	7
Manufacturing	36	30	27	23	27	23	20	22	19	1	29	2
Industry	34	25	27	24	22	17	18	21	21	2	30	3
Retail	34	27	22	23	19	21	20	19	17	1	34	3
Services	34	26	23	22	21	21	20	19	18	1	32	3
Before 2014	35	27	24	23	23	21	20	19	18	1	32	3
Between 2014-2020	33	27	25	22	18	21	22	21	19	1	31	3
After 2020*	13	13	13	14	9	11	2	7	11	0	60	2
Products	33	29	24	24	23	21	21	21	17	1	30	4
Services	31	22	20	20	18	19	17	17	16	1	36	3
Both	39	30	28	25	25	23	22	21	23	1	27	2

Note: * results based on less than 100 interviews
Base: SMEs undertaking resource efficiency actions, EU27 (n=12 107)
for all rows in the tables, except row '250+ employees' (n=827)

Analysis by country

In 13 Member States, among SMEs that are undertaking resource efficiency actions, the largest share reply that they **did not encounter any difficulties** when setting up these actions. SMEs in the Netherlands (49%), followed by those in Italy (45%), and Estonia and Denmark (both 43%), are the most likely not to have experienced difficulties. In Ireland, on the other hand, only 12% of SMEs did not encounter any difficulties in this process.

In the remaining 14 Member States, one of the nine difficulties listed in the survey is mentioned by the largest share of SMEs. In the majority of these countries (11), the largest share of SMEs say they encountered **complex administrative or legal procedures**: from 31% in Luxembourg to 53% in Spain. Complex procedures are the least frequently encountered by SMEs undertaking resource efficiency actions in Ireland and Denmark (9%-10% of SMEs mention this difficulty).

In Cyprus and Sweden, the largest proportion of SMEs answer that, when setting up resource efficiency actions, they experienced difficulties due to the **cost of environmental actions** (39% and 35%, respectively); this also applies to Ireland, although in this country, only 22% of SMEs select this response. The cost of environmental actions is also mentioned by 36% of SMEs undertaking resource efficiency actions in Greece and by 45% in Spain (although in these countries, it is not the most frequently mentioned difficulty encountered).

Q7 Did your company encounter any of the following difficulties when trying to set up resource efficiency actions? (% by country, EU27)

	Complexity of administrative or legal procedures	Cost of environmental actions	Lack of supply of required materials, parts, products or services	Lack of specific environmental expertise	Difficulty to adapt environmental legislation to your company	Difficulty in choosing the right resource efficiency actions for your company	Lack of demand for resource efficient products or services	Complexity associated with environmental labelling and certification	Technical requirements of the legislation not being up to date	Other	None	Don't know/No answer
EU27	34	27	24	23	21	21	20	19	18	1	32	3
BE	36	20	28	19	22	23	21	20	25	1	34	4
BG	27	10	11	10	11	9	8	7	17	4	35	8
CZ	47	25	30	24	16	18	23	18	22	1	23	1
DK	10	15	17	10	10	11	8	12	9	5	43	6
DE	29	22	30	19	16	16	19	26	16	2	37	3
EE	16	18	21	14	12	13	22	17	12	0	43	4
IE	9	22	21	8	6	12	9	8	5	1	12	10
EL	40	36	29	30	18	22	23	28	25	0	28	0
ES	53	45	39	47	32	34	38	29	28	0	18	1
FR	24	23	23	16	16	19	15	14	14	2	33	5
HR	41	17	21	18	21	14	23	11	27	1	25	3
IT	33	24	9	17	19	16	12	14	15	1	45	1
CY	34	39	27	22	11	21	18	19	16	0	33	2
LV	33	27	30	24	18	24	22	17	23	1	21	3
LT	28	14	26	20	11	20	20	12	11	0	33	1
LU	31	27	23	17	25	22	20	19	21	1	23	7
HU	33	25	24	15	21	23	16	11	14	1	29	4
MT	20	13	22	15	9	11	12	9	17	5	41	5
NL	14	19	17	18	12	14	10	17	12	0	49	3
AT	35	29	17	21	21	18	20	15	17	0	36	1
PL	44	27	23	26	40	26	24	25	19	1	20	4
PT	20	17	16	10	17	13	10	9	10	5	25	13
RO	47	31	30	34	36	29	32	27	33	0	28	1
SI	19	24	20	13	12	12	16	14	13	6	41	1
SK	51	30	30	22	23	18	25	25	20	1	23	1
FI	22	23	18	14	18	22	18	23	20	1	28	3
SE	29	35	30	22	21	33	25	23	20	0	30	1

Most-frequently selected response shown in green
Base: SMEs undertaking resource efficiency actions, EU27 (n=12 107)

SMEs undertaking resource efficiency actions in **the US** are less likely than their counterparts in the EU to have encountered difficulties due to complex administrative or legal procedures (22% vs. 34%), but they more frequently refer to a lack of supply of required materials, parts, products or services (36% vs 24%).

A lack of supply of required materials, parts, products or services is also mentioned by 35% of SMEs in **Moldova** and 36% in **Norway**; in these two countries, and in the US, this response is the top-ranking difficulty. In **Turkey**, the top-ranking difficulty is the cost of environmental actions (mentioned by 41%), while in **Serbia**, this place is taken by the complexity of administrative or legal procedures (mentioned by 38%).

In five of the non-EU countries surveyed, among SMEs that are undertaking resource efficiency actions, the largest share reply that they **did not encounter any difficulties** when setting up these actions (between 31% in North Macedonia and 48% in Iceland).

Q7 Did your company encounter any of the following difficulties when trying to set up resource efficiency actions? (% by country, non-EU countries)

	Complexity of administrative or legal procedures	Cost of environmental actions	Lack of supply of required materials, parts, products or services	Lack of specific environmental expertise	Difficulty to adapt environmental legislation to your company	Difficulty in choosing the right resource efficiency actions for your company	Lack of demand for resource efficient products or services	Complexity associated with environmental labelling and certification	Technical requirements of the legislation not being up to date	Other	None	Don't know/No answer
EU27	34	27	24	23	21	21	20	19	18	1	32	3
UK	15	26	28	24	17	16	23	15	10	1	34	4
TR	38	41	36	26	31	30	28	27	22	0	27	4
MK	24	12	19	10	8	10	12	7	14	3	31	4
ME	31	13	23	23	10	11	24	17	22	1	38	2
RS	38	14	27	22	20	17	20	13	25	2	24	3
AL	13	16	27	21	7	12	9	0	2	8	35	0
IS	23	18	11	19	8	10	10	21	13	2	48	0
NO	22	29	36	27	21	31	31	26	26	0	19	4
MD	26	32	35	26	19	24	32	9	21	1	18	5
US	22	31	36	19	14	19	20	16	16	2	33	2

Caution should be exercised when interpreting the results of Albania, Moldova and Montenegro, due to the smaller number of interviews having been conducted (between 63 and 96 per country).

Most-frequently selected response shown in green
Base: SMEs undertaking resource efficiency actions, non-EU countries (n=2 824)

Trend compared 2017

The following table shows the **evolution since 2017**, **at a country-by-country basis**, looking at each of the difficulties SMEs may have encountered when trying to set up resource efficiency actions. Blue values indicate a positive trend – i.e. a decrease in the proportion of SMEs that encountered difficulties (or an increase in the proportion of SMEs that have not experienced any difficulties – last column in the table). Orange values indicate a negative trend – i.e. an increase in the proportion of SMEs that encountered difficulties (or a decrease in the proportion of SMEs that have not experienced any difficulties).

The first observation to be made is that, in 19 Member States, compared to 2017, the proportion of SMEs undertaking resource efficiency actions that did **not encounter any difficulties** when setting up these actions decreased by at least five percentage points. The largest decreases in this proportion are observed in Ireland (-29 pp), Cyprus (-27 pp), Portugal (-22 pp), Estonia (-21 pp), Slovakia (-17 pp), Spain (-17 pp) and Lithuania (-16 pp).

The second observation to be made is the consistency across countries in the change observed for **a lack of supply of required materials, parts, products or services**. Across all but three of the Member States, the proportion of SMEs replying that they were hindered in their resource efficiency efforts by a lack of supply of the required materials, parts, products or services has increased by at least five percentage points. The largest increases in this proportion are observed in Cyprus (+25 pp), Slovakia (+21 pp), Sweden (+18 pp), Lithuania (+18 pp) and Spain (+17 pp).

Q7 Did your company encounter any of the following difficulties when trying to set up resource efficiency actions? (% by country, 2021 vs 2017, EU27)

	Complexity of administrative or legal procedures	Cost of environmental actions	Lack of supply of required materials, parts, products or services	Lack of specific environmental expertise	Difficulty to adapt environmental legislation to your company	Difficulty in choosing the right resource efficiency actions for your company	Lack of demand for resource efficient products or services	Technical requirements of the legislation not being up to date	None
EU27	-1	+2	+9	+2	-1	0	+3	-3	-5
BE	+3	-1	+13	+2	+4	0	+2	+3	-6
BG	-6	-4	0	-1	-2	0	-7	-2	+5
CZ	-4	-1	+16	+2	+2	+3	+10	+1	-4
DK	-11	-11	+8	-3	-4	-4	-5	-8	0
DE	+6	+4	+12	+5	0	0	+5	+4	-7
EE	+7	+9	+14	+11	+5	+11	+13	+5	-21
IE	-8	-3	+6	-16	-10	-11	-11	-7	-29
EL	-3	+14	+11	+7	-2	+1	-3	-7	-4
ES	+16	+14	+17	+15	+2	+10	+13	+5	-17
FR	-29	-21	+6	-18	-31	-19	-13	-33	+13
HR	-5	+3	+13	+5	+9	+1	+11	-1	-5
IT	+5	+9	+1	+5	+6	+6	+5	+7	-7
CY	+23	+32	+25	+14	+5	+19	+13	+8	-27
LV	+1	+9	+16	+9	+6	+8	0	+3	-8
LT	+14	+10	+18	+12	+3	+12	+13	+4	-16
LU	+2	+6	+9	0	+6	+6	-1	+1	-12
HU	+5	+4	+13	+4	0	+9	+6	0	-6
MT	+5	+1	+15	+8	+1	+7	+1	+8	-11
NL	-8	0	+6	+5	-2	-2	-2	-2	+5
AT	+5	+6	+5	+3	+2	-2	+3	-1	-6
PL	-9	0	+8	-2	+9	-1	+3	-5	-4
PT	-5	-6	+5	-8	-2	-8	-3	-3	-22
RO	+11	-1	+16	+17	+14	+13	+15	+6	+5
SI	-7	+6	+6	-4	-2	+4	+4	+2	-7
SK	+22	+18	+21	+14	+9	+13	+16	+12	-17
FI	+2	+5	+3	0	+5	-4	0	+3	-10
SE	+5	+10	+18	+8	+13	+9	+3	+12	-7

Base: SMEs undertaking resource efficiency actions, EU27 (n=12 107 in 2021; 10 099 in 2017)
▼▲ Evolution 2021-2017 (comparison with Flash Eurobarometer 456, Sept. 2017)

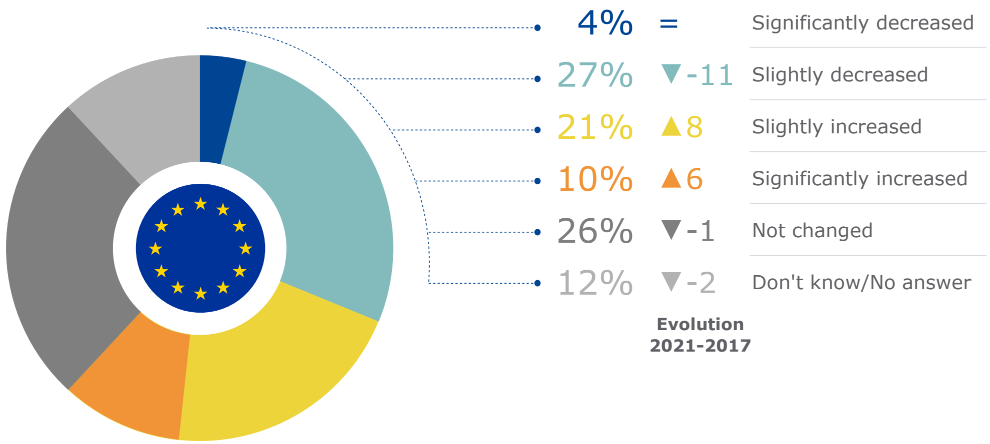
2.2. Impact of resource efficiency actions on production costs

The previous section looked at difficulties experienced by SMEs when setting up resource efficiency actions. This section looks at the results for the question on **changes in production costs due to the resource efficiency actions undertaken in the SMEs**. How production costs are impacted can be a barrier or incentive to resource efficiency. If production costs increase, SMEs may be less likely to implement additional resource efficiency measures; however, if it can be demonstrated that resource efficiency measures increase efficiency in terms of reducing production costs and increasing profitability, this can be an important incentive to invest in resource efficiency measures.

Among SMEs taking resource efficiency actions, 4% say these actions have significantly **decreased** their production costs over the past two years and 27% that there was a slight decrease in production costs. About one in five SMEs (21%) say production costs have slightly **increased** and 10% that this increase has been significant. About a quarter (26%) say there has been no change in production costs as a result of the resource efficiency actions.

Since 2017, the proportion of SMEs saying that **production costs have increased** as a result of the resource efficiency actions has significantly increased: +8 pp for 'slightly increased' and +6 pp for 'significantly increased'.

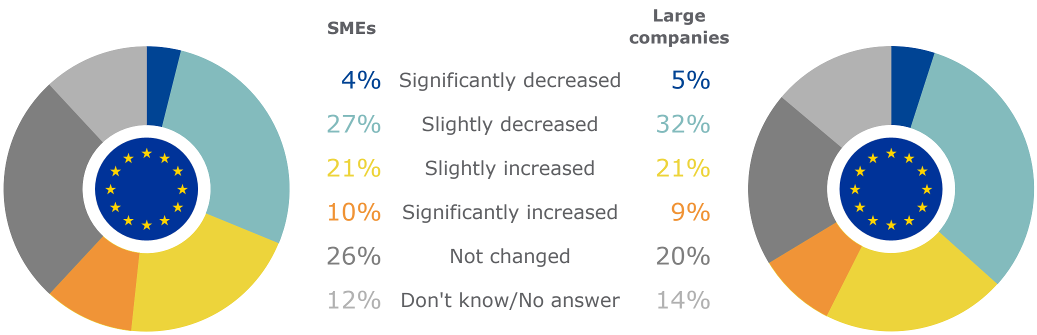
Q3 What impact have the undertaken resource efficiency actions had on the production costs over the past two years? The production costs have... (% EU27)



Base: SMEs undertaking resource efficiency actions, EU27 (n=12 107 in 2021; 10 099 in 2017)
▼▲ Evolution 2021-2017 (comparison with Flash Eurobarometer 456, Sept. 2017)

The charts on the next page show that, among SMEs and **large companies**, around three in ten companies taking resource efficiency actions reply that these actions have increased their production costs over the past two years. Nonetheless, among large companies, there are somewhat more respondents saying that the actions have led to a decrease in production costs (37% vs 31% for SMEs) and less respondents saying there was no change (20% vs 26%, repectively).

Q3 What impact have the undertaken resource efficiency actions had on the production costs over the past two years? The production costs have... (% SMEs and large companies, EU27)



Base: SMEs undertaking resource efficiency actions (n=12 107) vs large companies undertaking resource efficiency actions (n=827), EU27

Micro companies are the least likely to say that the resource efficiency actions undertaken in their company have decreased production costs (31%); this figure increases to 33% for small companies and to 35% for **medium-sized companies**. This proportion is also high for **SMEs with a turnover of more than €10,00,000** in 2020 (37%). The proportion saying that production costs have increased is between 31% and 34% across the different employee size categories.

The **sector analysis** shows that SMEs in industry are the least likely to say that resource efficiency actions have decreased production costs (28%), particularly when compared to SMEs in the services sector (33%). SMEs in manufacturing, on the other hand, are the most likely to say that production costs have increased (35%); this figure is 33% for SMEs in industry and then decreases to 30% for SMEs in the retail sector and 29% in the services sector. SMEs only selling services are less likely than SMEs selling products to have seen their production costs increase (27% vs 33%).

Q3 What impact have the undertaken resource efficiency actions had on the production costs over the past two years? The production costs have… (% by business characteristics, EU27)

	Decreased	Increased	Not changed	Don't know /No answer
EU27 (SMEs)	31	31	26	12
Company size				
1-9 employees	31	31	27	12
10-49 employees	33	34	22	11
50-249 employees	35	32	19	14
250+ employees	37	29	20	14
Company turnover in 2020				
Up to €100,000	34	30	27	9
€100,001-€500,000	33	32	26	10
€500,001-€2,000,000	31	35	25	9
€2,000,001-€10,000,000	30	26	30	13
More than €10,000,000	37	33	15	15
Sector of activity				
Manufacturing	31	35	26	8
Industry	28	33	30	9
Retail	31	30	24	15
Services	33	29	26	12
Company age (establishment year)				
Before 2014	32	31	26	11
Between 2014-2020	32	31	26	12
After 2020*	12	11	30	46
Selling products/services				
Products	30	33	23	14
Services	32	27	29	13
Both	32	33	25	9

Note: * results based on less than 100 interviews
Base: SMEs undertaking resource efficiency actions, EU27 (n=12 107)
for all rows in the tables, except row ‘250+ employees’ (n=827)

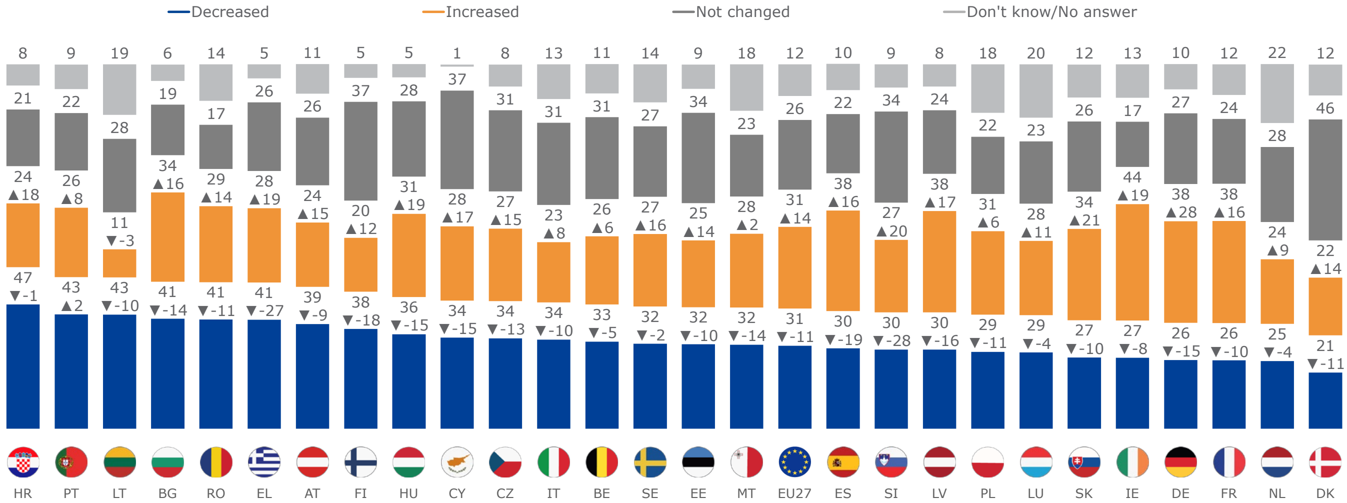
Analysis by country

There is a **large variation across countries** in the proportion of SMEs that have seen **their production costs either increase or decrease due to the resource efficiency actions** undertaken. In Croatia, almost one in two SMEs (47%) say that the resource efficiency actions they have undertaken have led to a decrease in production costs over the past two years. In Ireland, on the other hand, an almost equal proportion (44%) state the opposite – that the resource efficiency actions undertaken have increased production costs.

Countries close to Croatia – with a high proportion of SMEs having seen production costs decrease after undertaking resource efficiency actions – are Bulgaria, Greece, Lithuania, Portugal and Romania (between 41% and 43% 'decreased' responses). Although these countries are characterised by a high proportion of SMEs that have seen production costs decrease, **their number is lower than in 2017**. For example, in Greece, the proportion of SMEs reporting that resource efficiency actions have decreased their production costs has decreased by 27 percentage points compared to 2017.

The chart below shows that most Member States have seen **an increase in the proportion of SMEs replying that the resource efficiency actions undertaken have increased their production costs** over the past two years. The trend is in line with the observation in the previous section that there are now more SMEs than in 2017 identifying a lack of supply of required materials, parts, products or services as a problem encountered when implementing resource efficiency actions. The proportion of SMEs having seen an increase in production costs is the highest in Ireland (44%, +19 pp since 2017), followed by Germany (38%, +28 pp), Latvia (38%, +17 pp), France (38%, +16 pp) and Spain (38%, +16 pp).

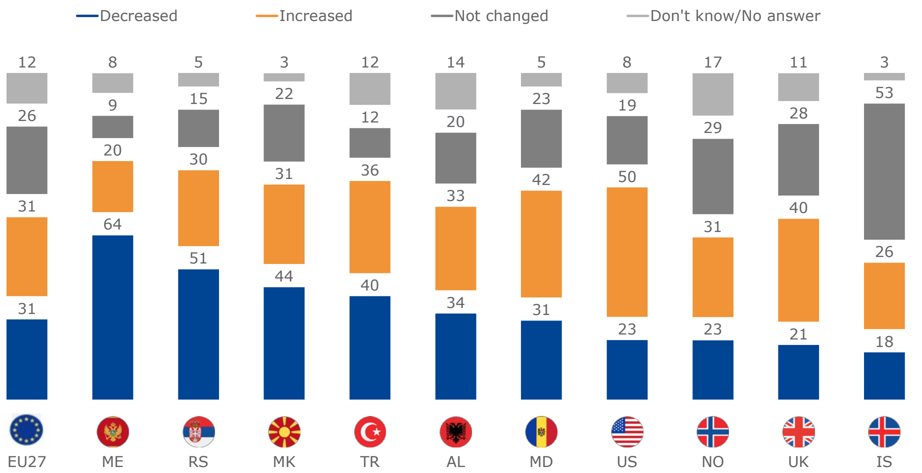
Q3 What impact have the undertaken resource efficiency actions had on the production costs over the past two years? The production costs have... (% by country, EU27)



Base: SMEs undertaking resource efficiency actions, EU27 (n=12 107 in 2021; 10 099 in 2017)
▼▲ Evolution 2021-2017 (comparison with Flash Eurobarometer 456, Sept. 2017)

The proportion of SMEs saying that the resource efficiency actions they have undertaken have led to a decrease in production costs over the past two years varies between 18% in **Iceland** and 64% in **Montenegro**. Conversely, the proportion having seen an increase in production costs ranges from 20% in Montenegro to 50% in the US. **SMEs in the US** are much more likely than SMEs in the EU to report that resource efficiency actions have increased their production costs (50% vs. 31%); a similar observation was also made in 2017.

Q3 What impact have the undertaken resource efficiency actions had on the production costs over the past two years? The production costs have... (% by country, non-EU countries)



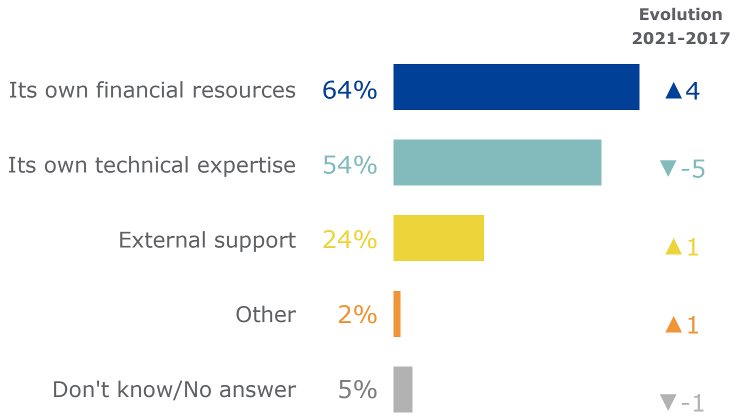
Caution should be exercised when interpreting the results of Albania, Moldova and Montenegro, due to the smaller number of interviews having been conducted (between 63 and 96 per country).

Base: SMEs undertaking resource efficiency actions, non-EU countries (n=2 824)

2.3. Support to go green and resource efficient

Among SMEs that have taken resource efficiency actions, 64% rely on their **own financial resources** and 54% on their **own technical expertise** in their efforts to be more resource efficient. Comparatively less SMEs rely on **external support** (24%). Since 2017, the proportion of SMEs relying on their own financial resources has increased (+4 pp), while the proportion of SMEs relying on their own technical support has decreased (-5 pp).

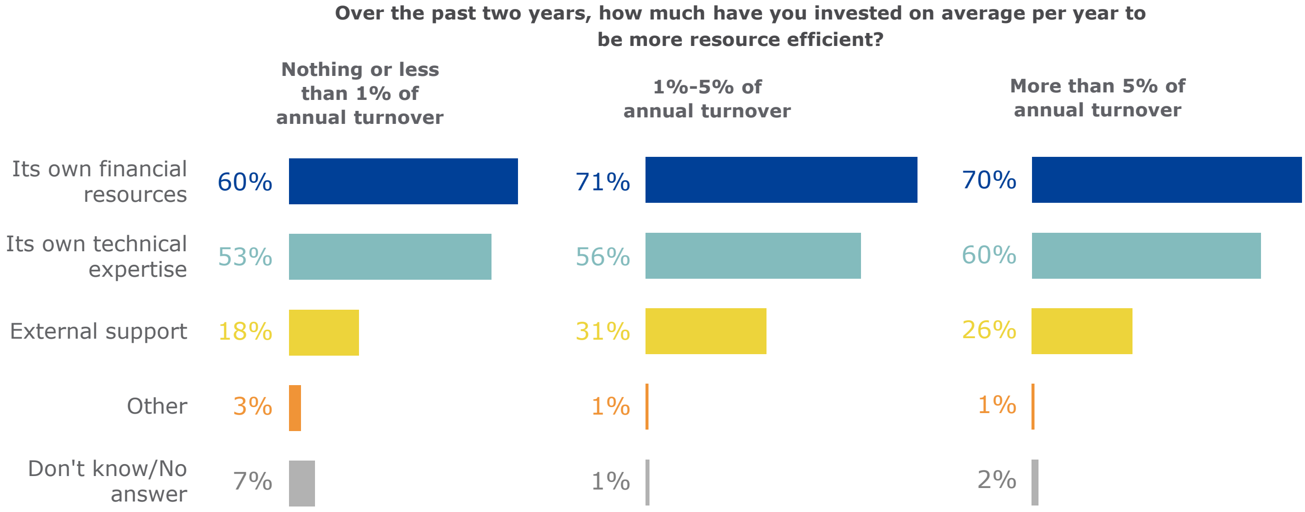
Q5 Which type of support does your company rely on in its efforts to be more resource efficient? (% EU27)



Base: SMEs undertaking resource efficiency actions, EU27 (n=12 107)

SMEs having **invested, on average, at least 1% of their annual turnover over the past two years** to become more resource efficient are more likely than SMEs undertaking resource efficiency actions without making this level of investment to rely on their own financial resources, on their own technical expertise and on external support for their resource efficiency actions. For example, 18% of the latter type of SMEs (i.e. those not investing) say they rely on external support to become more resource efficient; this figure increases to 26% for SMEs having invested more than 5% of their annual turnover and to 31% for those having invested between 1% and 5%.

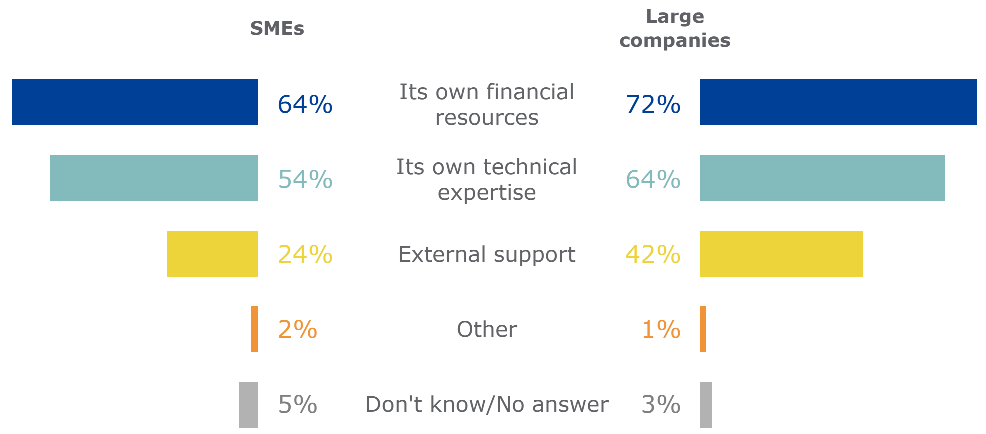
Q5 Which type of support does your company rely on in its efforts to be more resource efficient? (% by level of investment in resource efficiency, EU27)



Base: SMEs undertaking resource efficiency actions, EU27 (n=5 171; n=3 734; n=1 680)

Compared to SMEs, **large companies** are more likely to rely on their own financial resources (72% vs 64%) and their own technical expertise (64% vs 54%) in their efforts to be more resource efficient. The biggest difference between SMEs and large companies, however, is observed for external support: 42% of large companies, compared to 24% of SMEs, say they rely on external support in their efforts to be more resource efficient.

Q5 Which type of support does your company rely on in its efforts to be more resource efficient? (% SMEs and large companies, EU27)



Base: SMEs undertaking resource efficiency actions (n=12 107) vs large companies undertaking resource efficiency actions (n=827), EU27

The larger the SME (in terms of **employees**), the more likely they are to rely on the three types of support to become more resource efficient. The difference is again the largest for external support: 23% of micro companies rely on external support, compared to 28% of small companies and 37% of medium-sized ones. The importance of external support also increases with the **annual turnover** of the SME: from 18% for SMEs with a turnover of €100,000 or less to 42% for SMEs with a turnover of more than €10,000,000.

In their efforts to be more resource efficient, SMEs in **industry** (61%) and **manufacturing** (60%) are more likely to rely on their own technical expertise than SMEs in retail (51%) and services (52%). SMEs in industry are less likely than their counterparts in other sectors to rely on their own financial resources (58% vs 65%-67%) and SMEs in the retail sector are somewhat less likely to rely on external support (21% vs 23%-25%). Comparing SMEs **selling services vs products**, only one difference is observed – SMEs focusing solely on services are somewhat less likely to rely on their own financial resources (62% vs 66% for SMEs selling products and 65% for those selling products and services).

SMEs established after 2020 are less likely to rely on their own technical expertise (48% vs 53%-57% of older SMEs), but they are somewhat more likely to rely on external support (27% vs 21%-24% of older SMEs).

Q5 Which type of support does your company rely on in its efforts to be more resource efficient? (% by business characteristics, EU27)

	Its own financial resources	Its own technical expertise	External support	Other	Don't know /No answer
EU27 (SMEs)	64	54	24	2	5
Company size					
1-9 employees	64	54	23	2	5
10-49 employees	67	56	28	1	5
50-249 employees	68	60	37	1	3
250+ employees	72	64	42	1	3
Company turnover in 2020					
Up to €100,000	67	54	18	1	5
€100,001-€500,000	64	55	24	2	4
€500,001-€2,000,000	64	55	27	2	4
€2,000,001-€10,000,000	57	56	29	0	4
More than €10,000,000	72	52	42	0	2
Sector of activity					
Manufacturing	65	60	23	2	3
Industry	58	61	25	2	5
Retail	67	51	21	2	5
Services	65	52	25	2	5
Company age (establishment year)					
Before 2014	65	53	24	2	5
Between 2014-2020	61	57	21	2	5
After 2020*	63	48	27	0	7
Selling products/services					
Products	66	52	23	1	6
Services	62	54	23	2	5
Both	65	56	24	2	4

Note: * results based on less than 100 interviews
Base: SMEs undertaking resource efficiency actions, EU27 (n=12 107)
for all rows in the tables, except row '250+ employees' (n=827)

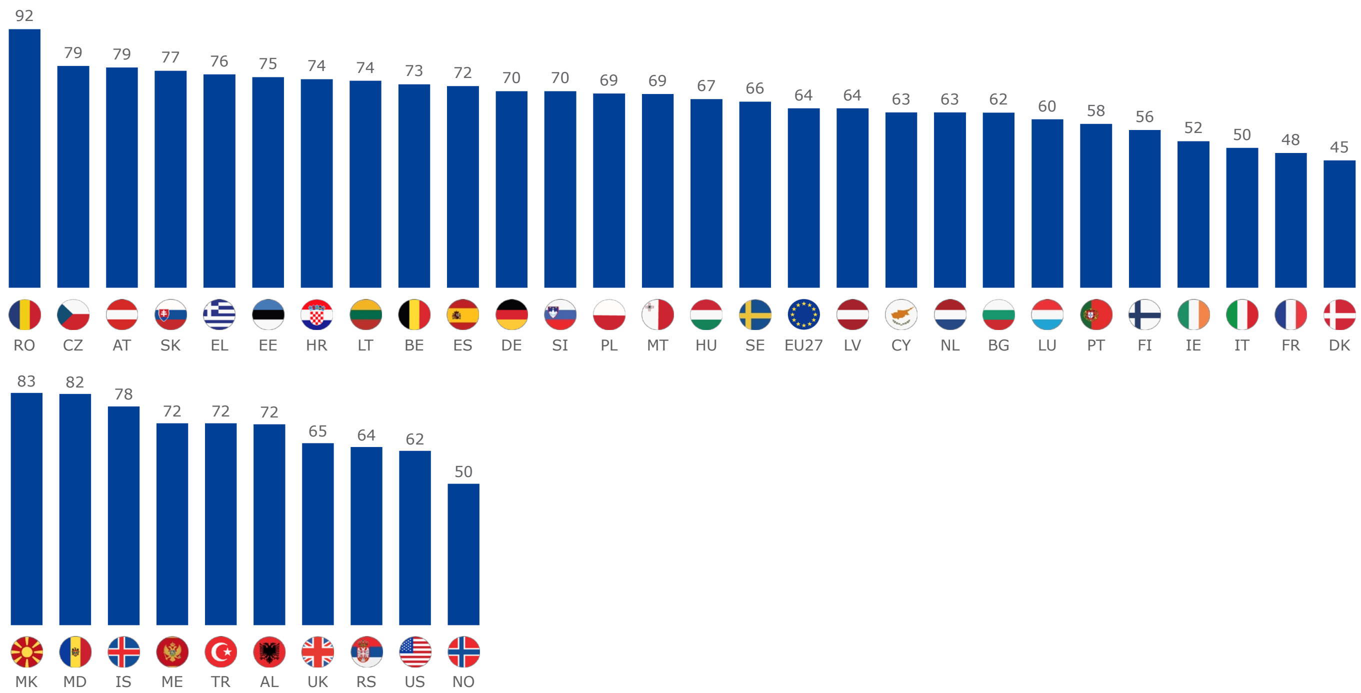
Analysis by country

In 24 Member States, SMEs are most likely to say they rely on their **own financial resources** in their efforts to be more resource efficient. The proportion selecting this response is overall the highest in Romania (92%), followed by Austria and Czechia (both 79%). In Denmark and France, on the other hand, less than half of respondents rely on their own financial resources (45% and 48%, respectively).

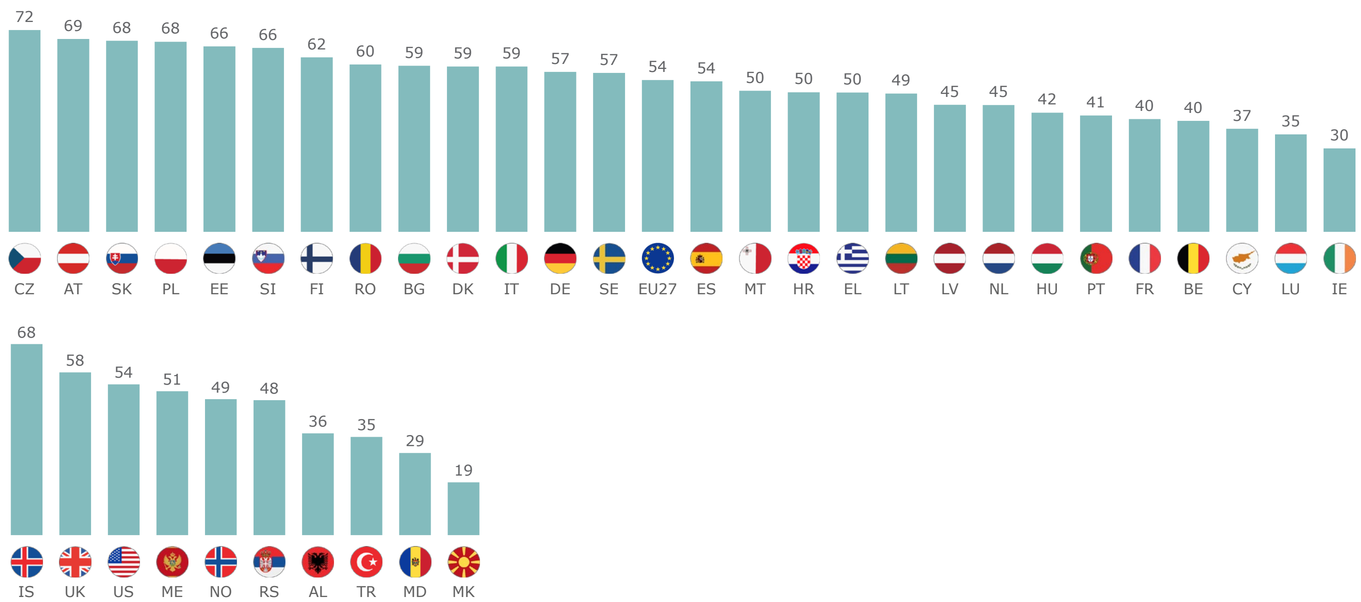
In Denmark, Finland and Italy, about six in ten SMEs say they rely on their **own technical expertise** to become more resource efficient (between 59% and 62%); in these three countries, this is the most-frequent response. The largest proportions selecting this response are observed in Czechia (72%), Austria (69%), and Poland and Slovakia (both 68%).

Q5 Which type of support does your company rely on in its efforts to be more resource efficient?

% **"Its own financial resources"** by country



% **"Its own technical expertise"** by country



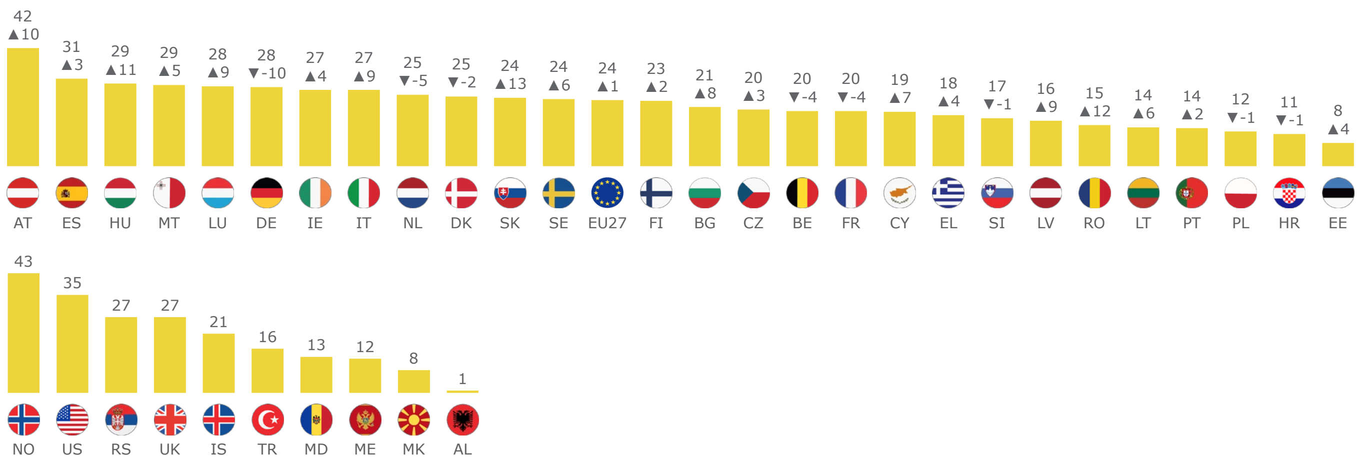
Caution should be exercised when interpreting the results of Albania, Moldova and Montenegro, due to the smaller number of interviews having been conducted (between 63 and 96 per country).

Base: SMEs undertaking resource efficiency actions, (n=12 107 in EU27; n=2 824 in non-EU countries)

Among SMEs in the EU that have taken resource efficiency actions, 24% say they rely on **external support** in their efforts to be more resource efficient. At the individual country level, Austria stands out with 42% of SMEs saying the same, followed at a distance by Hungary, Malta and Spain (29%-31%). The lowest proportion of SMEs relying on external support in their efforts to be more resource efficient is observed in Estonia (8%); as noted above, Estonia is among the group of countries where SMEs are the most likely to rely on their own financial resources and/or technical expertise.

The chart below also shows the trend compared to 2017 for the EU countries. In 12 Member States, the proportion of SMEs relying on external support to be more resource efficient has increased by five or more percentage points compared to 2017. The largest increases are observed in Slovakia (+13 pp, to 24%), Romania (+12 pp, to 15%), Hungary (+11 pp, to 29%) and Austria(+10 pp, to 42%)

Q5 Which type of support does your company rely on in its efforts to be more resource efficient?
% **"External support"** by country



Caution should be exercised when interpreting the results of Albania, Moldova and Montenegro, due to the smaller number of interviews having been conducted (between 63 and 96 per country).

Base: SMEs undertaking resource efficiency actions, EU27 (n=12 107 in 2021; 10 099 in 2017), non-EU countries (n=2 824)
▼▲ Evolution 2021-2017 (comparison with Flash Eurobarometer 456, Sept. 2017)

There is also a large variation across the **non-EU countries** in the proportion of SMEs having taken resource efficiency actions and relying on external support in their efforts; from 1% in Albania to 43% in Norway. In the US, 35% of SMEs use external support in their efforts to be more resource efficient (compared to 24%, on average, across the EU).

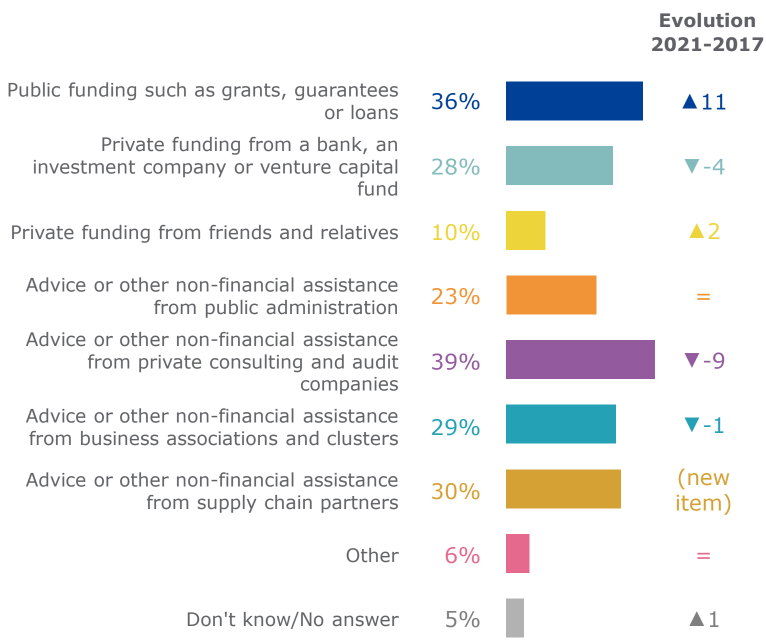
Types of external support used by SMEs to be more resource efficient

SMEs relying on external support in their efforts to be more resource efficient were asked for more details about the type of external support they receive; they were presented with a list of seven types of support.

More than a third (36%) of SMEs relying on external support in their efforts to be more resource efficient say they receive **public funding**, such as grants, guarantees or loans (+11 pp compared to 2017). Over a quarter (28%) receive **private funding** from a bank, investment company or venture capital fund, and one in ten receive private funding from friends and relatives.

Another large share (39%) of SMEs relying on external support in their efforts to be more resource efficient receive **advice or other non-financial assistance** from private consulting and audit companies, followed by 30% mentioning this type of support from supply chain partners and 29% from business associations and clusters. Just under a quarter (23%) of SMEs receive advice or other non-financial assistance from public administration in their efforts to be more resource efficient.

Q6 More precisely, which type of external support is it? (% EU27)



Base: SMEs that rely on external support in their efforts to be more resource efficient, EU27 (n=3 206 in 2021; 2 500 in 2017)
▼▲ Evolution 2021-2017 (comparison with Flash Eurobarometer 456, Sept. 2017)

Public and private funding

The larger the SME (in terms of **number of employees**), the more likely they are to receive public **funding**, such as grants, guarantees or loans, for implementing resource efficiency measures (from 35% for micro companies using external funding to 46% for medium-sized ones). Among **large companies** (with 250 or more employees) using external support, 39% say they receive public funding. Large companies are also less likely than SMEs to answer that they receive private funding from a bank, an investment company or venture capital fund (23% vs 28% of SMEs).

Micro companies are more likely than larger SMEs to use private funding from friends and relatives (11% vs 3% of medium-sized SMEs). A similar difference is also seen in terms of **turnover values**: 20% of SMEs with a turnover in 2020 of less than €100,000, relying on external support to become more resource efficient, answer that this support comes in the form of private funding from friends and relatives; among SMEs with more than €10,000,000 in turnover, not more than a handful (1%) say the same.

SMEs in the **manufacturing sector** are the most likely to use public funding, such as grants, guarantees or loans, for implementing resource efficiency measures (44% compared to 36%-37% of SMEs in retail and services and 28% in the industry sector). Public funding is also more frequently mentioned by SMEs selling products (36%), or both products and services (41%) – compared to 30% of SMEs selling only services.

SMEs in the **services sector** are more likely than their counterparts in other sectors to receive private funding from a bank, an investment company or venture capital fund (32% compared to, for example, 20% of SMEs in manufacturing). SMEs in the retail and services sectors are also somewhat more likely to answer that they use funding from friends or relatives (10%-13% vs 6%-7% in industry and manufacturing).

Advice and non-financial assistance

For the different forms of advice and non-financial assistance, it is the larger SMEs (both in terms of **number of employees and turnover**) that are more likely to state using this type of assistance. For example, 38% of micro companies relying on external support in their efforts to be more resource efficient receive advice or other non-financial assistance from private consulting and audit companies; this proportion increases to 47% for medium-sized SMEs (and to 50% for large companies).

An analysis by sector shows that the largest proportion of SMEs receiving advice or other non-financial assistance from public administration is observed in the **services sector** (27%). For advice or other non-financial assistance from private consulting and audit companies, the largest figure (51%) is observed for SMEs in the **retail sector** (this type of advice is also more popular among SMEs selling services, or both products and services). SMEs in **industry**, on the other hand, are more likely to refer to advice or other non-financial assistance from business associations and clusters (38%) and SMEs in **manufacturing** to this type of assistance from supply chain partners (42%).

Q6 More precisely, which type of external support is it? (% by business characteristics, EU27)

	Public funding such as grants, guarantees or loans	Private funding from a bank, an investment company or venture capital fund	Private funding from friends and relatives	Advice or other non-financial assistance from public administration	Advice or other non-financial assistance from private consulting and audit companies	Advice or other non-financial assistance from business associations and clusters	Advice or other non-financial assistance from supply chain partners	Other	Don't know/No answer
EU27 (SMEs)	36	28	10	23	39	29	30	6	5
Company size									
1-9 employees	35	28	11	23	38	28	29	6	5
10-49 employees	40	27	6	26	46	31	36	5	3
50-249 employees	46	29	3	28	47	37	39	4	3
250+ employees	39	23	4	35	50	42	40	3	2
Company turnover in 2020									
Up to €100,000	29	25	20	25	30	28	33	3	7
€100,001-€500,000	43	34	11	29	39	28	27	6	1
€500,001-€2,000,000	33	28	5	23	43	37	34	5	7
€2,000,001-€10,000,000	35	23	7	9	51	26	20	7	2
More than €10,000,000	33	45	1	20	49	40	48	1	1
Sector of activity									
Manufacturing	44	20	6	24	43	19	42	4	3
Industry	28	23	7	19	39	38	29	6	6
Retail	37	27	10	20	51	24	27	6	3
Services	36	32	13	27	31	29	30	7	6
Company age (establishment year)									
Before 2014	38	28	9	24	41	29	30	5	4
Between 2014-2020	28	26	15	22	32	30	29	7	6
After 2020*	16	29	3	15	39	1	30	37	3
Selling products/services									
Products	36	27	11	21	33	29	31	5	5
Services	30	26	12	22	39	31	26	6	4
Both	41	30	9	26	42	26	32	7	5

Note: * results based on less than 50 interviews
Base: SMEs that rely on external support in their efforts to be more resource efficient, EU27 (n=3 206 for all rows in the tables, except row '250+ employees' (n=337)

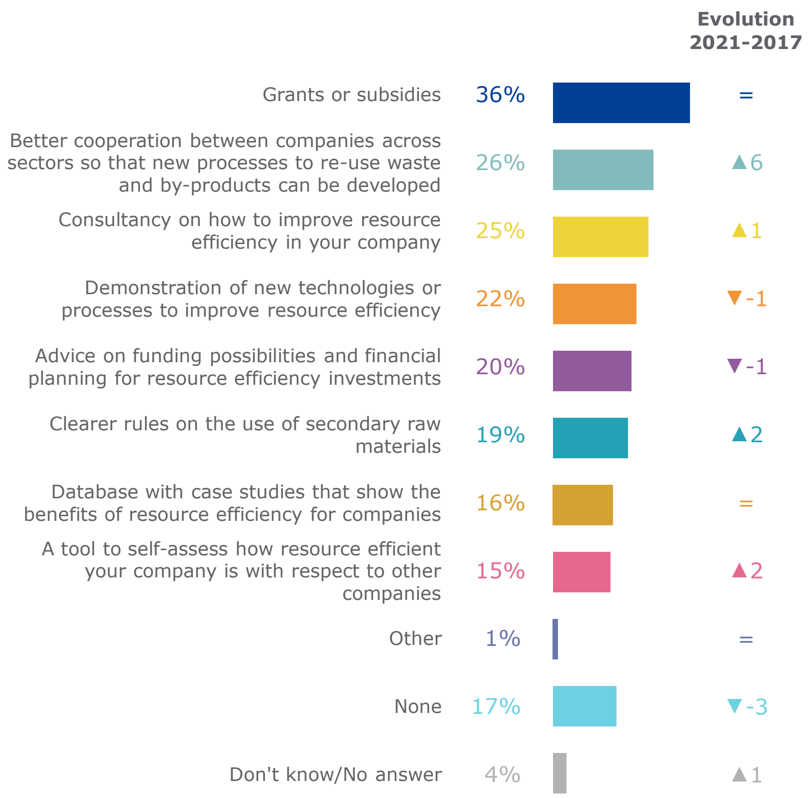
2.4. What would help SMEs most to go green and resource efficient?

More than one third of SMEs (36%) think that **grants or subsidies** would help their company the most to be more resource efficient; as in 2017, this is the most-mentioned form of assistance. About a quarter of SMEs (26%) say that **better cooperation between companies across sectors**, so that new processes to reuse waste and by-products can be developed, would help them the most; this response is selected by a larger share than in 2017 (+6 pp).

A tool to self-assess how resource efficient their company is compared to other companies and a database with case studies showing the benefits of resource efficiency for companies are selected the least frequently (15% and 16%, respectively). The remaining forms of assistance are selected by between 19% and 25% of respondents. For example, 22% of SMEs think that a demonstration of new technologies or processes to improve resource efficiency would help their company the most to be more resource efficient.

One in six SMEs (17%) say that none of the measures and tools listed in the survey would help them to be more resource efficient. Compared to 2017, SMEs are now somewhat less likely to share this view (-3 pp).

Q8 Which of the following would help your company the most to be more resource efficient? (% EU27)



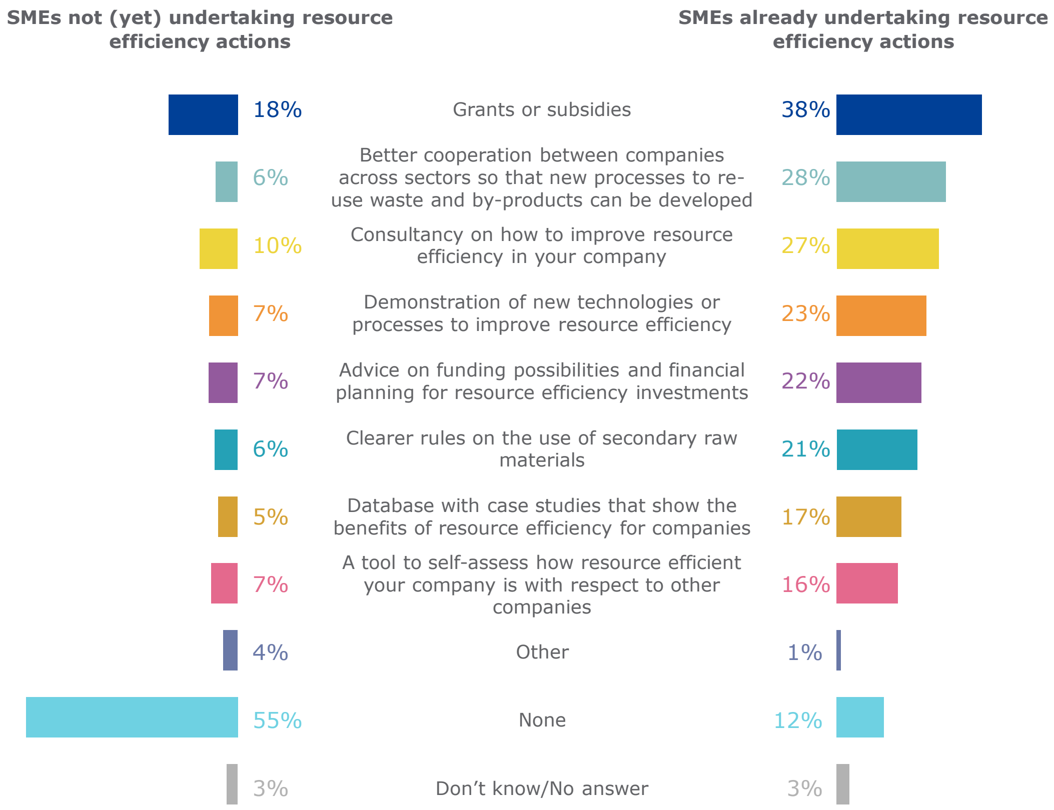
Base: all SMEs, EU27 (n=13 343 in 2021; 11 690 in 2017)
▼▲ Evolution 2021-2017 (comparison with Flash Eurobarometer 456, Sept. 2017)

The following figure compares the views of SMEs not yet undertaking resource efficiency actions and those already undertaking such actions.

Among SMEs **already undertaking resource efficiency actions**, the proportion selecting the different support measures and tools varies between 16% for a tool to self-assess how resource efficient their company is to 38% for grants or subsidies. Among these SMEs, 12% reply that none of the measures and tools listed in the survey would help them to be more resource efficient.

Among SMEs **not yet taking resource efficiency actions**, however, 55% reply that none of the measures and tools listed in the survey would help them to be more resource efficient and, only for grants and subsidies, more than one in ten respondents (18%) reply that these would help them to become more resource efficient.

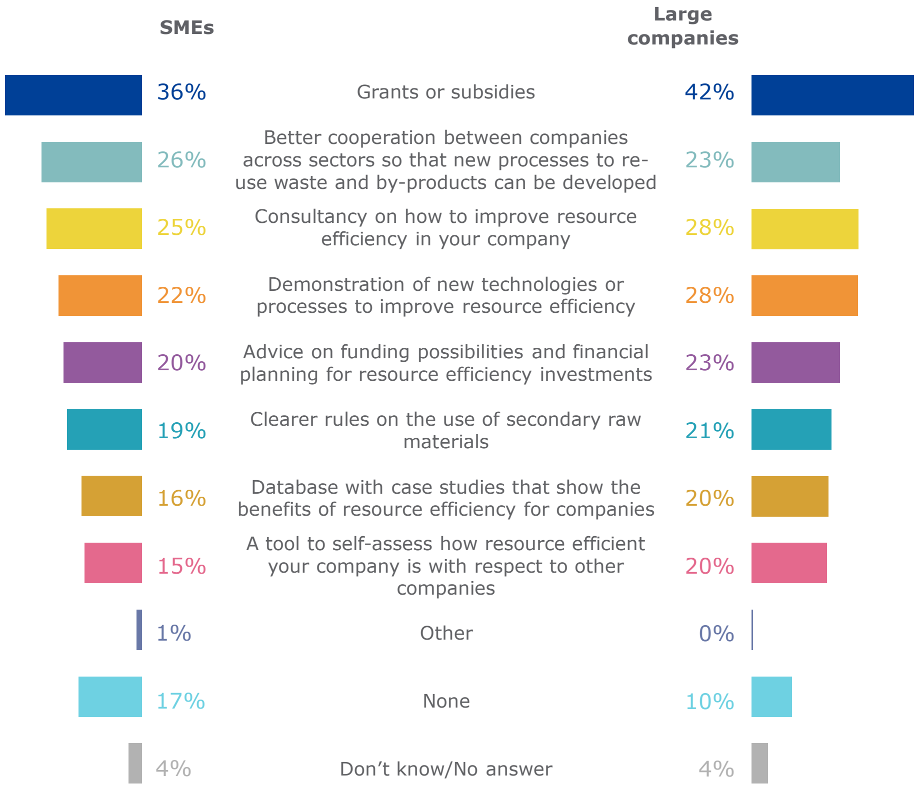
Q8 Which of the following would help your company the most to be more resource efficient?
(% SMEs already taking actions vs SMEs not taking actions, EU27)



Base: SMEs already undertaking resource efficiency actions (n=12 211) and SMEs not undertaking resource efficiency actions (n=1 006), EU27

Both among SMEs and **large companies**, the largest share of respondents think that grants or subsidies would help their company the most to be more resource efficient (36% and 42%, respectively). For the remaining forms of assistance, preferences of SMEs and large companies deviate somewhat; for example, 26% of SMEs say that better cooperation between companies across sectors (so that new processes to reuse waste and by-products can be developed) would help them the most; among large companies, this view is shared by 23% of respondents. Additionally, while 28% of large companies think that a demonstration of new technologies or processes to improve resource efficiency would help their company the most; this figure is somewhat lower for SMEs (22%).

Q8 Which of the following would help your company the most to be more resource efficient? (% SMEs and large companies, EU27)



Base: all SMEs (n=13 343) vs all large companies (n=872), EU27

Medium-sized SMEs are generally the most likely to say that the measures and tools listed in the survey would help them to be more resource efficient. For example, 41% mention grants or subsidies, compared to 35% of micro companies.

An analysis by **sector** shows, for example, that SMEs in manufacturing are more likely than their counterparts in other sectors to think that a demonstration of new technologies or processes to improve resource efficiency would help them the most (29% vs 20%-21%). A similar pattern is also seen for grant and subsidies (40% vs 33%-37%) and advice on funding possibilities and financial planning for resource efficiency investments (24% vs 17%-21%). Among SMEs in the industry sector, 23% say that clearer rules on the use of secondary raw materials would help the most; this figure is somewhat lower in the other sectors (18%-20%).

Micro companies are somewhat more likely to reply that none of the measures and tools would help them the most (17% vs 11% of medium-sized companies); this also applies to SMEs with a turnover in 2020 of less than €10,000 (17%). This view is also shared by about one in six SMEs in the **retail and services sectors** (17%-18% vs 12% in manufacturing and 15% in industry).

Q8 Which of the following would help your company the most to be more resource efficient? (% by business characteristics, EU27)

	Grants or subsidies	Better cooperation between companies across sectors so that new processes to re-use waste and by-products can be developed	Consultancy on how to improve resource efficiency in your company	Demonstration of new technologies or processes to improve resource efficiency	Advice on funding possibilities and financial planning for resource efficiency investments	Clearer rules on the use of secondary raw materials	Database with case studies that show the benefits of resource efficiency for companies	A tool to self-assess how resource efficient your company is with respect to other companies	Other	None	Don't know/No answer
EU27 (SMEs)	36	26	25	22	20	19	16	15	1	17	4
Company size											
1-9 employees	35	26	25	21	20	20	16	15	1	17	3
10-49 employees	40	24	27	26	23	19	16	17	1	14	4
50-249 employees	41	27	29	27	23	20	18	20	1	11	4
250+ employees	42	23	28	28	23	21	20	20	0	10	4
Company turnover in 2020											
Up to €100,000	37	24	22	20	23	21	15	14	1	17	3
€100,001-€500,000	37	28	25	23	22	18	17	16	1	15	3
€500,001-€2,000,000	36	29	27	25	20	18	17	15	1	15	3
€2,000,001-€10,000,000	27	27	33	22	19	28	15	17	2	14	3
More than €10,000,000	40	26	29	23	21	22	18	14	1	13	1
Sector of activity											
Manufacturing	40	29	25	29	24	20	17	12	2	12	3
Industry	34	28	22	21	17	23	14	16	1	15	4
Retail	33	28	25	20	21	19	16	13	1	17	4
Services	37	24	25	21	20	18	16	17	2	18	3
Company age (establishment year)											
Before 2014	35	25	25	22	20	20	15	15	1	17	4
Between 2014-2020	38	30	24	22	24	17	18	15	1	15	2
After 2020*	22	25	17	20	13	13	12	20	0	33	5
Selling products/services											
Products	35	27	24	20	19	19	17	13	2	18	4
Services	35	23	23	22	21	19	14	15	1	17	4
Both	37	30	28	23	21	21	16	17	1	14	3

Base: all SMEs, EU27 (n=13 343) for all rows in the tables, except row '250+ employees' (n=872)

Analysis by country

In line with the EU average results, in 23 Member States, the largest share of SMEs think that **grants or subsidies** would help their company the most to be more resource efficient. In seven Member States, at least half of respondents think that grants or subsidies would help the most: Cyprus (50%), Spain (51%), Romania (52%), Slovakia (53%), Greece (54%), Slovenia (55%) and Malta (60%).

In eight countries, at least three in ten SMEs reply that **better cooperation between companies across sectors**, so that new processes to reuse waste and by-products can be developed, would help them the most to be more resource efficient; for example, this proportion is 34% in Sweden and 35% in Spain. In Italy and Finland, 31% of SMEs believe that this measure would be the most helpful, making it the top-ranking measure in these countries.

In 20 Member States, between 20% and 34% of SMEs say that **consultancy on how to improve resource efficiency in their company** would help them the most; in Luxembourg, this is the joint most-frequently selected response – together with **a demonstration of new technologies or processes to improve resource efficiency** (both selected by 28% of SMEs). The latter type of assistance is also ranked highest in Sweden (34%). In another 20 countries, between 20% and 31% of SMEs say that a demonstration of new technologies or processes would help them the most.

The proportion of SMEs replying that **advice on funding possibilities and financial planning for resource efficiency investments** would help them the most varies between 13% in Denmark and 36% in Malta. In total, in 11 Member States, more than a quarter of SMEs mention this type of assistance (e.g. 28% in Croatia and 32% in Romania).

The remaining measures tend to be selected by smaller numbers in most countries. For example, in 20 Member States, less than 20% of SMEs answer that clearer rules on the use of secondary raw materials would help them the most when undertaking resource efficiency actions; in Italy and Poland, this proportion is higher (28% and 31%, respectively)

SMEs in Ireland, Portugal, Romania and Spain are overall the least likely to say that **none of the measures and tools listed in the survey would help them** to be more resource efficient (between 6% and 9%). In Finland, France, the Netherlands, Denmark, Germany and Estonia, on the other hand, more than one in five SMEs share this view (between 21% and 28%). It is worth adding that there are, of course, two possible reasons for SMEs to select this response: (1) they find the measures listed in the survey not adequate, or (2) the SMEs are not looking for support (e.g. because they are already resource efficient and/or manage to implement measures without support).

Q8 Which of the following would help your company the most to be more resource efficient? (% by country, EU27)

	Grants or subsidies	Better cooperation between companies across sectors so that new processes to re-use waste and by-products can be developed	Consultancy on how to improve resource efficiency in your company	Demonstration of new technologies or processes to improve resource efficiency	Advice on funding possibilities and financial planning for resource efficiency investments	Clearer rules on the use of secondary raw materials	Database with case studies that show the benefits of resource efficiency for companies	A tool to self-assess how resource efficient your company is with respect to other companies	Other	None	Don't know/No answer
EU27	36	26	25	22	20	19	16	15	1	17	4
BE	36	30	22	23	20	18	19	25	2	16	2
BG	35	19	20	19	14	6	15	6	3	13	5
CZ	32	31	18	34	22	22	16	7	3	15	3
DK	29	17	23	17	13	4	8	9	4	24	9
DE	31	19	24	23	18	18	18	20	2	25	2
EE	29	25	18	21	21	7	9	6	1	28	6
IE	45	23	19	27	17	18	14	20	2	8	4
EL	54	23	33	23	32	12	17	18	0	13	0
ES	51	35	33	22	27	24	19	19	1	6	2
FR	35	20	20	16	15	11	12	10	1	23	7
HR	45	27	24	21	28	12	10	7	0	13	3
IT	22	31	29	21	20	28	15	15	1	16	4
CY	50	25	32	21	20	9	11	18	0	19	0
LV	36	21	21	25	26	21	16	13	1	11	2
LT	36	22	26	24	26	15	13	15	2	18	1
LU	27	24	28	28	27	17	17	14	5	14	3
HU	45	20	17	31	21	12	17	10	0	13	3
MT	60	25	19	21	36	8	18	11	3	16	6
NL	35	32	26	21	15	9	15	22	1	23	5
AT	30	20	23	23	26	16	23	22	4	14	2
PL	32	22	18	20	16	31	14	11	1	20	2
PT	26	21	25	17	21	19	9	8	4	9	11
RO	52	33	29	24	32	20	22	11	0	9	2
SI	55	16	23	15	26	9	9	4	3	18	3
SK	53	24	22	26	28	24	17	8	0	11	3
FI	28	31	17	22	16	15	14	19	2	21	2
SE	36	34	34	25	23	17	17	26	1	10	2

Most-frequently selected response shown in green
Base: all SMEs, EU27 (n=13 343)

In **the US**, SMEs have a similar view as SMEs in the EU (average results) about what would be the most helpful forms of assistance to be more resource efficient, with the largest share (38%) saying that grants or subsidies would help them the most. In the US, 20% of SMEs reply that none of the measures and tools listed in the survey would help them to be more resource efficient (compared to 17% in the EU).

In the **UK, Moldova, North Macedonia, Montenegro and Serbia**, between 45% and 56% of respondents reply that grants or subsidies would help their SME the most to be more resource efficient. This proportion is lower in Albania, Turkey, Iceland and Norway (between 18% and 34%). In **Iceland and Norway**, a larger share of respondents think that better cooperation between companies across sectors (so that new processes to reuse waste and by-products can be developed) would help them the most (selected by 35% and 42%, respectively). In **Turkey**, the most-mentioned response is a demonstration of new technologies or processes to improve resource efficiency (selected by 29%), while in **Albania**, the largest share of respondents reply that none of the measures and tools listed in the survey would help them to be more resource efficient (31%).

Q8 Which of the following would help your company the most to be more resource efficient? (% by country, non-EU countries)

	Grants or subsidies	Better cooperation between companies across sectors so that new processes to re-use waste and by-products can be developed	Consultancy on how to improve resource efficiency in your company	Demonstration of new technologies or processes to improve resource efficiency	Advice on funding possibilities and financial planning for resource efficiency investments	Clearer rules on the use of secondary raw materials	Database with case studies that show the benefits of resource efficiency for companies	A tool to self-assess how resource efficient your company is with respect to other companies	Other	None	Don't know/No answer
EU27	36	26	25	22	20	19	16	15	1	17	4
UK	45	30	17	20	32	15	12	22	0	14	2
TR	22	28	21	29	26	19	23	22	0	14	4
MK	53	14	17	14	22	12	6	4	2	10	2
ME	55	17	24	11	30	19	3	10	0	16	2
RS	56	25	25	22	16	18	13	7	1	11	1
AL	18	22	21	12	19	7	4	6	4	31	0
IS	31	35	31	23	14	12	14	12	1	27	1
NO	34	42	19	27	30	22	17	18	1	9	4
MD	48	19	32	29	27	22	29	2	7	6	3
US	38	22	19	22	17	10	9	17	1	20	3

Caution should be exercised when interpreting the results of Albania, Moldova and Montenegro, due to the smaller number of interviews having been conducted (between 93 and 107 per country).

Most-frequently selected response shown in green
Base: all SMEs, non-EU countries (n=3 200)

Section 3. Green markets

The next two chapters of this report focus on **green markets for SMEs**. For the purpose of this survey, **green products and services** are defined as products and services with a predominant function of **reducing environmental risk and minimising pollution and resources**; this may also include products with environmental features (e.g. organically produced, eco-labelled, with significant recycled content, or eco-designed etc.).

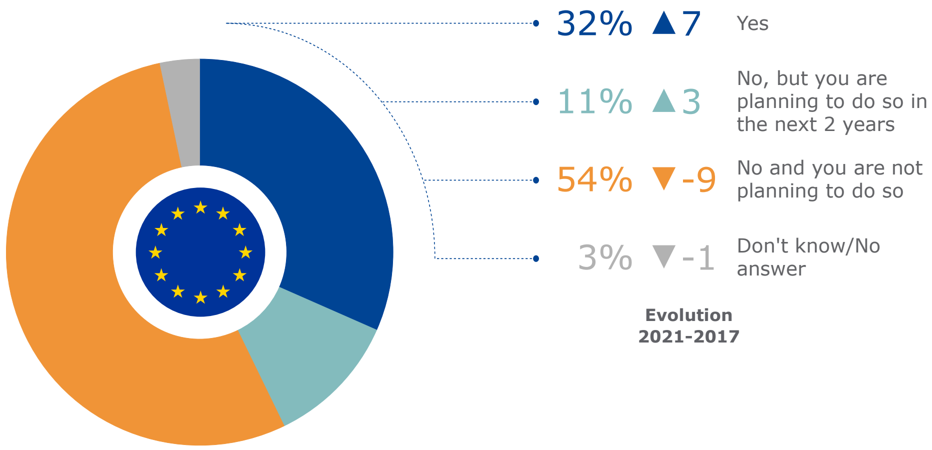
In this chapter, the proportion of SMEs currently offering green products or services is discussed, as well as the length of time they have been offering these products and services, the markets to which they sell and the proportion of turnover that green products or services represent for these SMEs.

3.1. SMEs offering green products or services

About one in three (32%) SMEs in the EU **offer green products or services**, with a further 11% **planning to do so in the next two years**. A slim majority of SMEs do not offer green products or services and have no plans to do so (54%).

Compared to 2017, there is a seven-point increase in the proportion of SMEs currently offering green products or services and a three-point increase in the proportion planning to do so in the next two years. The proportion of SMEs not offering green products or services and having no plans to do so has decreased by nine percentage points since 2017.

Q9 Does your company offer green products or services? (% EU27)

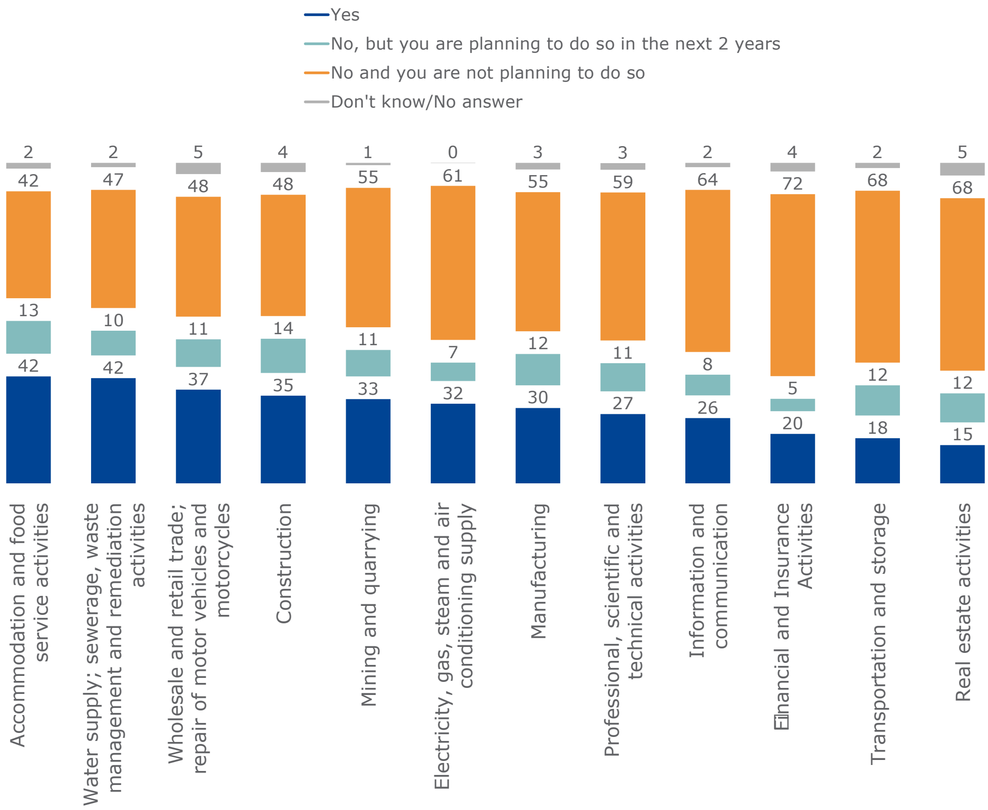


Base: all SMEs, EU27 (n=13 343 in 2021; 11 690 in 2017)
▼▲ Evolution 2021-2017 (comparison with Flash Eurobarometer 456, Sept. 2017)

The chart below illustrates that there are substantial **differences in the proportion of SMEs selling green products or services across the different NACE sectors**. While SMEs in the sector of accommodation and food services are among the most likely to sell green products or services (42%), in the remaining **service sectors**, SMEs are much less likely to be offering green products or services (for example, 15% in the sector of real estate services and 20% in the sector of financial and insurance activities).

Three in ten SMEs in **manufacturing** answer that their company offers green products or services. Among SMEs in the **industry sectors**, the proportion is somewhat higher than in manufacturing (e.g. 35% in construction and 42% in water supply, sewerage, waste and remediation).

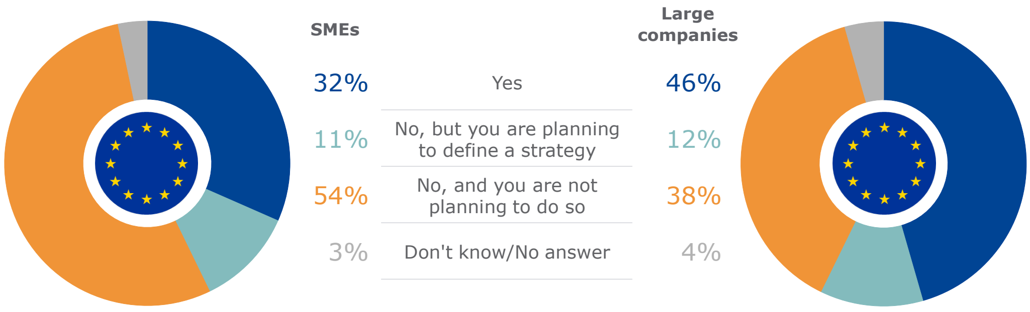
Q9 Does your company offer green products or services? (% by NACE sector, EU27)



Base: all SMEs (n=13 343), EU27

Large companies are more likely to currently offer green products or services (46% vs. 32% of SMEs). SMEs and large companies are as likely to reply that they do not yet offer green products and services, but are planning to do so in the next two years (11% vs 12%).

Q9 Does your company offer green products or services? (% SMEs and large companies, EU27)



Base: all SMEs (n=13 343) vs all large companies (n=872), EU27

The **largest SMEs** (with between 50 and 249 employees) are the most likely to have green products or services in their offer, particularly when compared to micro companies (38% vs 31%). There is no difference based on SME size in the proportions with plans to offer green products or services in the next two years (all 11%). When comparing SMEs looking at their **turnover in 2020**, the largest difference is seen between SMEs with a turnover of more than €10,000,000 and those with lower turnover values. Among the former, 42% are selling green products or services; among SMEs with lower turnover values, between 30% and 33% do so.

In line with the differences observed by NACE sector (discussed earlier in this section), SMEs are more likely to be **selling green products** than **green services**. Among SMEs selling only products, 38% reply that they have green products on offer; the corresponding figure for SMEs only selling green services is 24%.

Q9 Does your company offer green products or services? (% by business characteristics, EU27)

	Yes	No, but you are planning to do so in the next 2 years	No and you are not planning to do so	Don't know /No answer
EU27 (SMEs)	32	11	54	3
Company size				
1-9 employees	31	11	54	3
10-49 employees	34	11	51	4
50-249 employees	38	11	46	4
250+ employees	46	12	38	4
Company turnover in 2020				
Up to €100,000	30	12	55	3
€100,001-€500,000	31	12	56	2
€500,001-€2,000,000	33	10	54	3
€2,000,001-€10,000,000	31	13	53	4
More than €10,000,000	42	7	43	8
Sector of activity				
Manufacturing	30	12	55	3
Industry	35	13	50	3
Retail	37	11	48	5
Services	27	11	60	3
Company age (establishment year)				
Before 2014	31	11	55	3
Between 2014-2020	33	14	51	3
After 2020	33	7	55	5
Selling products/services				
Products	38	11	48	4
Services	24	9	63	3
Both	36	14	47	3

Base: all SMEs, EU27 (n=13 343) for all rows in the tables,
except row '250+ employees' (n=872)

Analysis by country

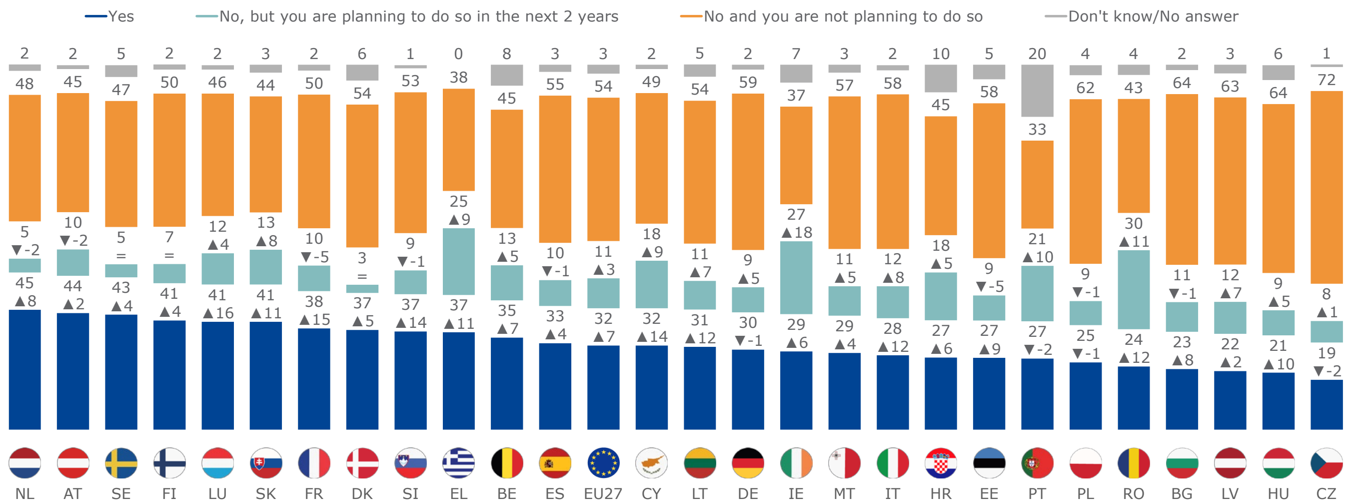
At least about one in five SMEs across all Member States **currently offer green products or services**. SMEs in the Netherlands (45%), Austria (44%) and Sweden (43%) are the most likely to be doing so, while those in Czechia (19%), Hungary (21%) and Latvia (22%) are the least likely.

SMEs in Greece (25%), Ireland (27%) and Romania (30%) are the most likely to say they are not currently offering green products or services but are **planning to do so in the next two years**. In some countries, less than one in ten SMEs plan to launch green products or services; for example, 5% in the Netherlands and 8% in Czechia. In the Netherlands, however, a large share of SMEs is already offering green products or services, while in Czechia this is not the case and 72% of SMEs neither have a green offer nor plan to launch one.

The proportion of SMEs not **offering green products or services** and having no plans to do so is above 50% in Czechia (mentioned above) and in 12 other countries, such as Bulgaria, Hungary, Latvia and Poland (62%-64%).

In line with the EU average results, in 17 Member States, the proportion of SMEs offering green products or services has increased by at least five percentage points **compared to 2017**. The largest increases are observed in Luxembourg (+16 pp, to 41%), France (+15 pp, to 38%), Slovenia (+14 pp, to 37%) and Cyprus (+14 pp, to 32%).

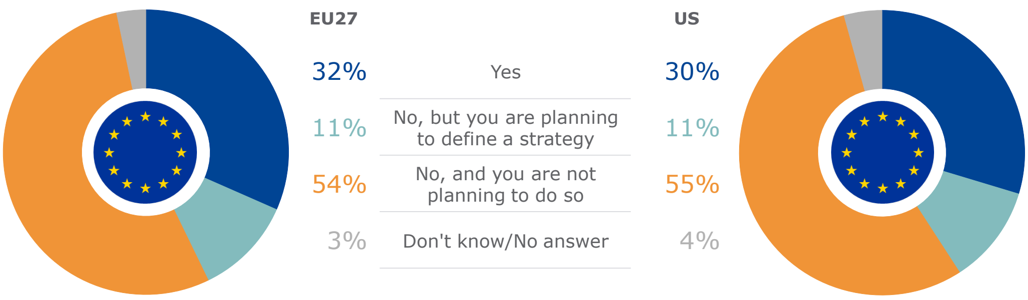
Q9 Does your company offer green products or services? (% by country, EU27)



Base: all SMEs, EU27 (n=13 343 in 2021; 11 690 in 2017)
▼▲ Evolution 2021-2017 (comparison with Flash Eurobarometer 456, Sept. 2017)

SMEs in the US are about as likely as SMEs in the EU to offer green products or services (30% and 32%, respectively). The proportion of SMEs with plans to start offering green products or services is also the same in the US and across the EU (both 11%).

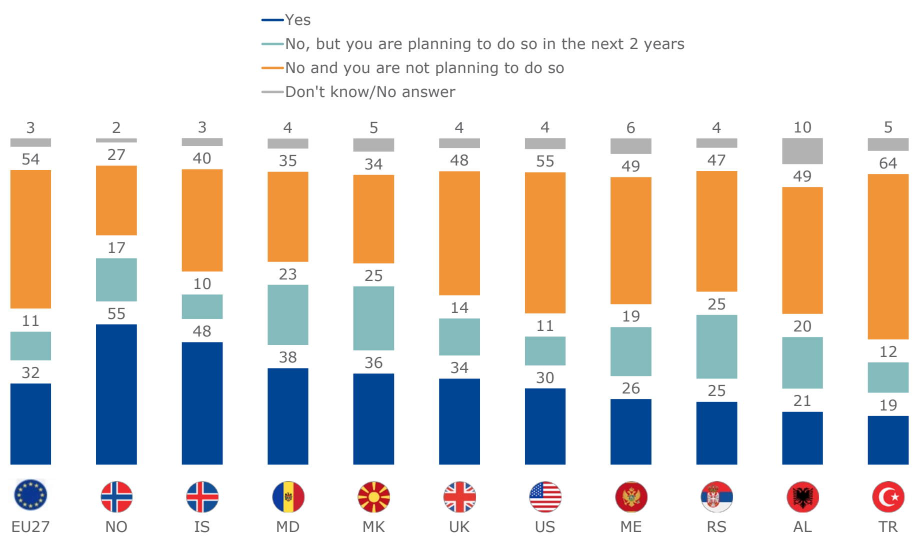
Q9 Does your company offer green products or services? (% EU27 vs US)



Base: all SMEs, EU27 (n=13 343), US (n=483)

The proportion of SMEs offering green products or services is 19% in **Turkey** and 21% in **Albania** and then increases to 48% in **Iceland** and 55% in **Norway**. SMEs in Turkey are among the least likely to have plans to start offering green products or services (12%); this proportion is also low in Iceland (10%), but SMEs in Iceland are much more likely to be already offering green products or services. In **Serbia** and **North Macedonia**, a quarter of SMEs are not currently offering green products or services but are planning to do so in the next two years.

Q9 Does your company offer green products or services? (% by country, non-EU countries)



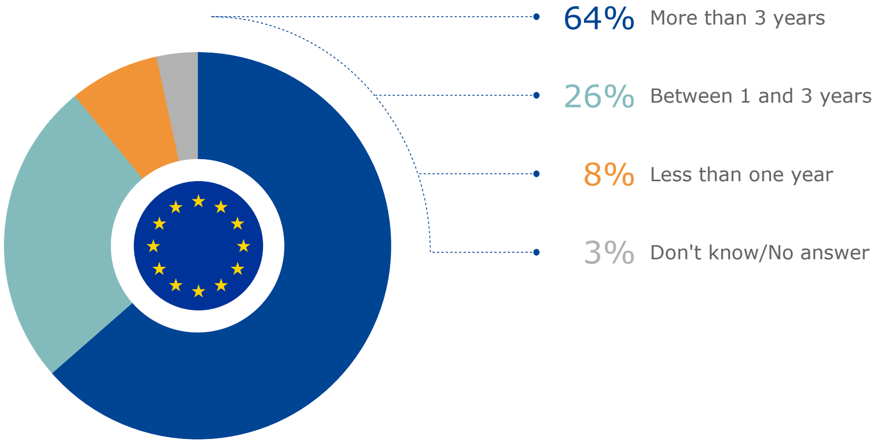
Caution should be exercised when interpreting the results of Albania, Moldova and Montenegro, due to the smaller number of interviews having been conducted (between 93 and 107 per country).

Base: all SMEs, non-EU countries (n=3 200)

3.2. For how long have SMEs been offering green products or services?

Most SMEs selling green products or services have been doing so for **more than three years** (64%). About one in four (26%) have been selling them for one to three years, while 8% have been selling green products or services for less than one year.

Q11 For how long has your company been selling green products or services? (% EU27)



Base: SMEs offering green products and services, EU27 (n=4 537)

Of the **large companies** selling green products and services, 67% reply they have been doing so for more than three years. There is no difference in this proportion across the different size classes (in terms of employees) for SMEs: 64% for micro and small companies and 65% for medium-sized companies.

SMEs with a **turnover** of more than €2,000,000 euros are overall the most likely to say they have been selling green products or services for more than three years: 76% of SMEs selling green products or turnover with a turnover of more than €2,000,000 vs 54% of SMEs with a turnover of less than €100,000. They are followed by SMEs in **manufacturing** (74% vs 61% in the retail and services sectors) and SMEs **established before 2014** (71% vs 40% of SMEs established between 2014 and 2020).

Q11 For how long has your company been selling green products or services? (% by business characteristics, EU27)

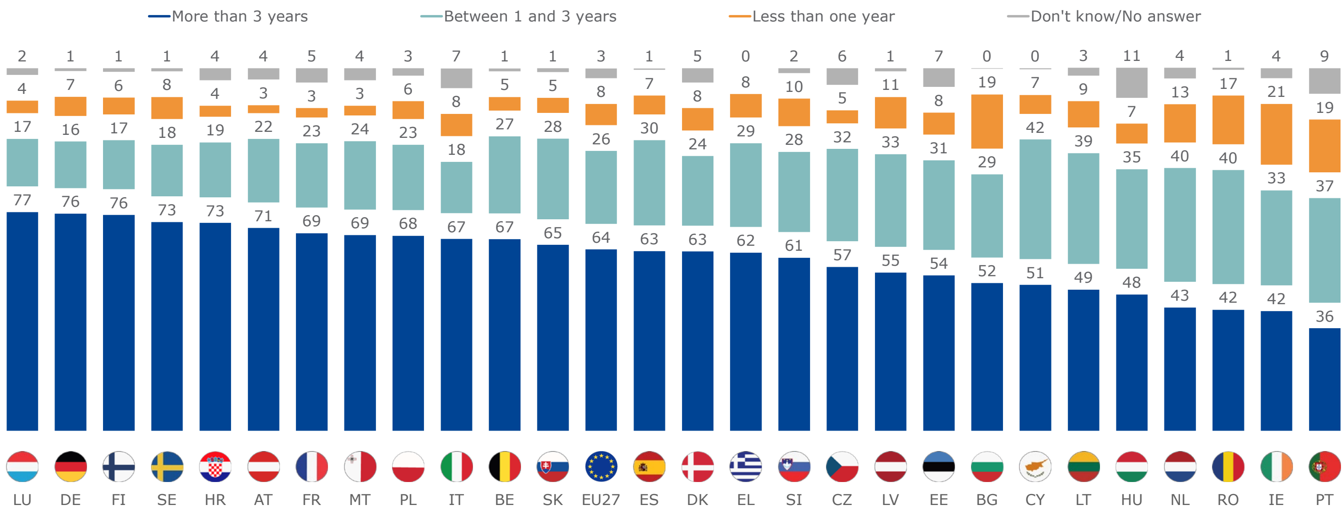
	More than three years	Between 1 and 3 years	Less than one year	Don't know /No answer
EU27 (SMEs)	64	26	8	3
Company size				
1-9 employees	64	26	8	3
10-49 employees	64	25	7	4
50-249 employees	65	26	5	4
250+ employees	67	27	5	2
Company turnover in 2020				
Up to €100,000	54	29	12	5
€100,001-€500,000	69	24	5	2
€500,001-€2,000,000	63	31	4	2
€2,000,001-€10,000,000	76	18	4	2
More than €10,000,000	76	14	8	2
Sector of activity				
Manufacturing	74	18	5	3
Industry	67	21	7	5
Retail	61	29	8	1
Services	61	26	8	4
Company age (establishment year)				
Before 2014	71	21	5	3
Between 2014-2020	40	42	13	4
After 2020*	30	2	68	0
Selling products/services				
Products	63	26	7	4
Services	61	25	8	6
Both	66	25	8	1

Note: * results based on less than 50 interviews
Base: SMEs offering green products and services, EU27 (n=4 537) for all rows in the tables, except row '250+ employees' (n=377)

In Germany; Finland and Luxembourg, more than three-quarters of SMEs selling green products or services have been doing so for **more than three years**. In Portugal, on the other hand, only half as many SMEs (36%) have been selling green products or services for more than three years, while a similar share (37%) has been doing so for **between one and three years**. Other countries where a large share of SMEs report that they started selling green products or services between one and three years ago include Lithuania (39%), the Netherlands and Romania (both 40%), and Cyprus (42%). In the latter countries, it was seen in the previous section that the proportion of SMEs selling green products or services has increased over the past four years (from 2017 to 2021).

The proportions of SMEs that most recently started offering green products or services – i.e. **less than one year ago** – are the highest in Ireland (21%), Bulgaria and Portugal (both 19%), and Romania (17%).

Q11 For how long has your company been selling green products or services?
(% by country, EU27)

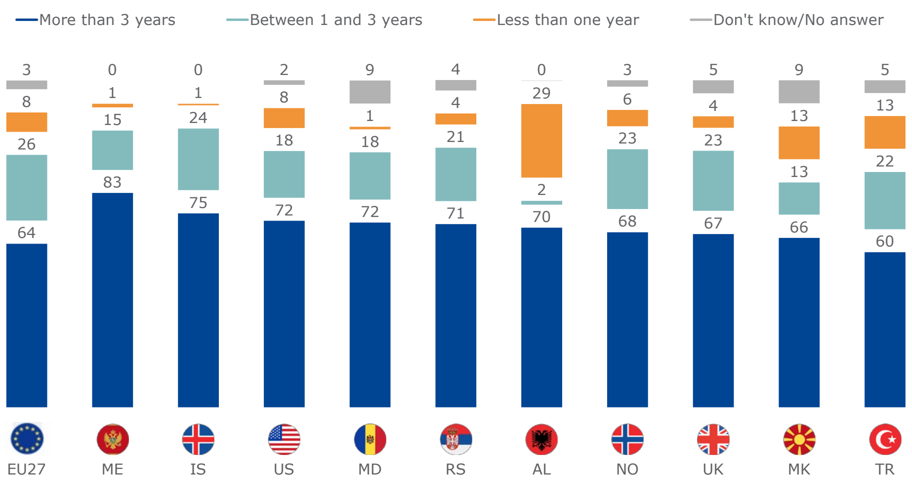


Caution should be exercised when interpreting the results of Cyprus, Luxembourg, Malta, due to the smaller number of interviews having been conducted (between 71 and 82 per country).

Base: SMEs offering green products and services (n=4 537), EU27

In Turkey, 60% of SMEs selling green products or services have been doing so for more than three years. In the other **non-EU countries** surveyed, this figure is also close to the EU average figure, or even somewhat higher. For example, 72% of **SMEs in the US** report having been selling green products or services for more than three years. Montenegro and Albania seem to stand out with a high proportion of SMEs selling products for more than three years (Montenegro) or a higher proportion selling these products for less than one year (Albania); due to smaller number of interviews in these countries, however, these figures should be interpreted with caution.

Q11 For how long has your company been selling green products or services?
(% by country, non-EU countries)



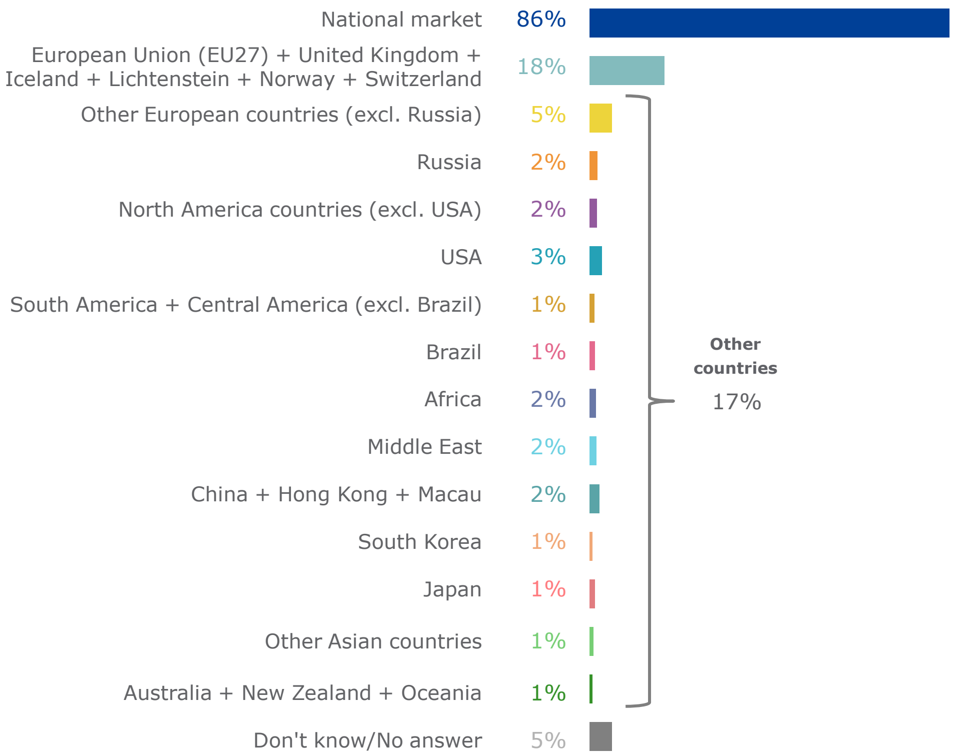
Caution should be exercised when interpreting the results of Albania, Moldova and Montenegro, due to the smaller number of interviews having been conducted (between 23 and 46 per country).

Base: SMEs offering green products and services (n=1 139), non-EU countries

3.3. Domestic vs export green markets

Close to nine in ten (86%) SMEs selling green products or services say their **own country is their main market for these products (in terms of annual turnover)**. About one in six (18%) say that their main market consists of the Member States of the EU and /or the UK, Iceland, Liechtenstein, Norway and Switzerland. Another 17% say that (one of) their main market(s) is outside of the European Economic Area (EEA)[8], Switzerland and the UK.

Q12 In terms of turnover over the past 2 years, what were the main markets (countries/ geographical regions) for your green products or services? (% EU27)



Base: SMEs offering green products and services, EU27 (n=4 537)

[8] The EEA includes EU countries and also Iceland, Liechtenstein and Norway. It allows them to be part of the EU's single market. Switzerland is not an EU or EEA member but is part of the single market.

Across all categories of green SMEs (selling green products or services), the vast majority are mainly active in their national market. **Larger SMEs** (both in terms of number of employees and turnover values) and those **active in manufacturing** are more likely to (also) be active in an export market. For example, among green micro companies, 17% say that their main market consists of the Member States of the EU and /or the UK, Iceland, Liechtenstein, Norway and Switzerland; this figure increases to 28% among medium-sized companies, and to 42% for **large companies** (with at least 250 employees).

Q12 In terms of turnover over the past 2 years, what were the main markets (countries/ geographical regions) for your green products or services? (% by business characteristics, EU27)

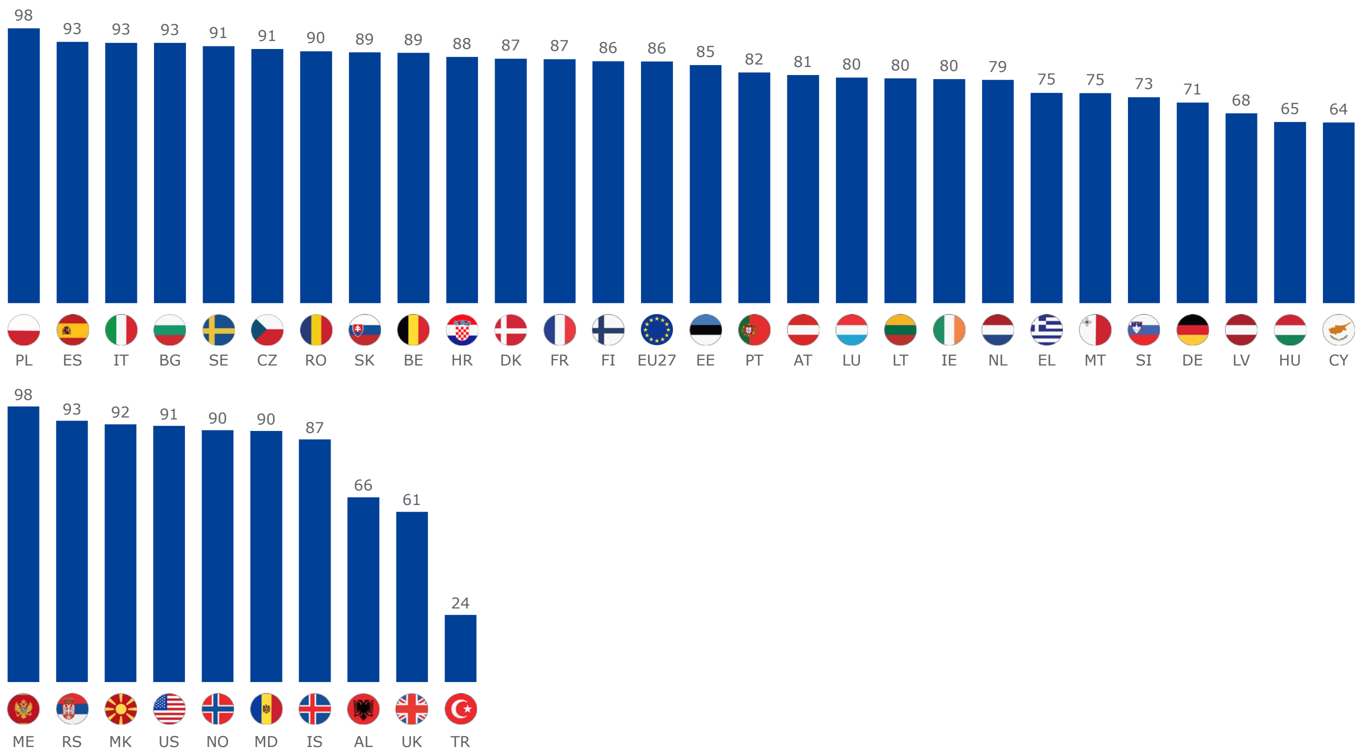
	National markets	EU27 + UK + Iceland + Lichtenstein + Norway + Switzerland	Other countries	Don't know /No answer
EU27 (SMEs)	86	18	17	5
Company size				
1-9 employees	86	17	16	5
10-49 employees	84	22	20	5
50-249 employees	80	28	21	6
250+ employees	74	42	29	5
Company turnover in 2020				
Up to €100,000	91	14	16	3
€100,001-€500,000	87	18	18	4
€500,001-€2,000,000	85	17	12	4
€2,000,001-€10,000,000	87	27	34	3
More than €10,000,000	61	36	27	5
Sector of activity				
Manufacturing	83	30	31	1
Industry	85	13	12	8
Retail	87	18	15	4
Services	87	17	17	5
Company age (establishment year)				
Before 2014	87	18	17	5
Between 2014-2020	84	19	13	5
After 2020*	69	17	29	16
Selling products/services				
Products	86	19	15	5
Services	85	18	21	6
Both	88	17	14	4

Note: * results based on less than 50 interviews
Base: SMEs offering green products and services, EU27 (n=4 537) for all rows in the tables, except row '250+ employees' (n=377)

Across all Member States, more than six in ten SMEs selling green products or services say that, in terms of turnover in the past two years, their **national market was the most important**. In Czechia, Sweden, Bulgaria, Italy, Spain and Poland, more than nine in ten SMEs give this response (between 91% and 98%).

A similar picture emerges in the non-EU countries, the exception being Turkey. In this country, just 24% of SMEs say that the Turkish market was their main market for green products or services in the past two years.

Q12 In terms of turnover over the past 2 years, what were the main markets (countries/ geographical regions) for your green products or services?
% **"National market"** by country

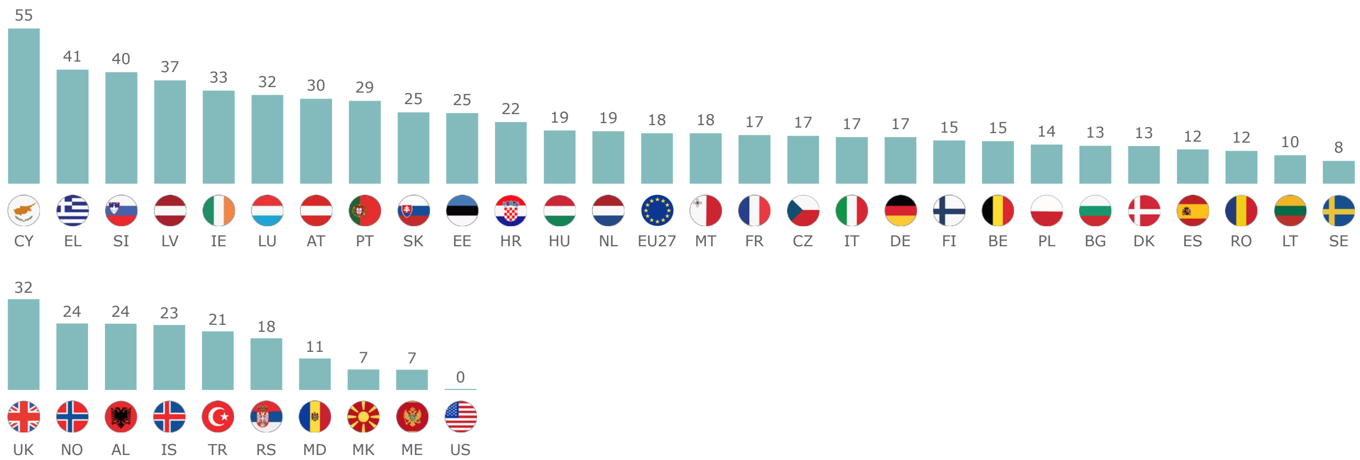


Caution should be exercised when interpreting the results of Cyprus, Luxembourg, Malta, Albania, Moldova and Montenegro, due to the smaller number of interviews having been conducted (between 23 and 82 per country).

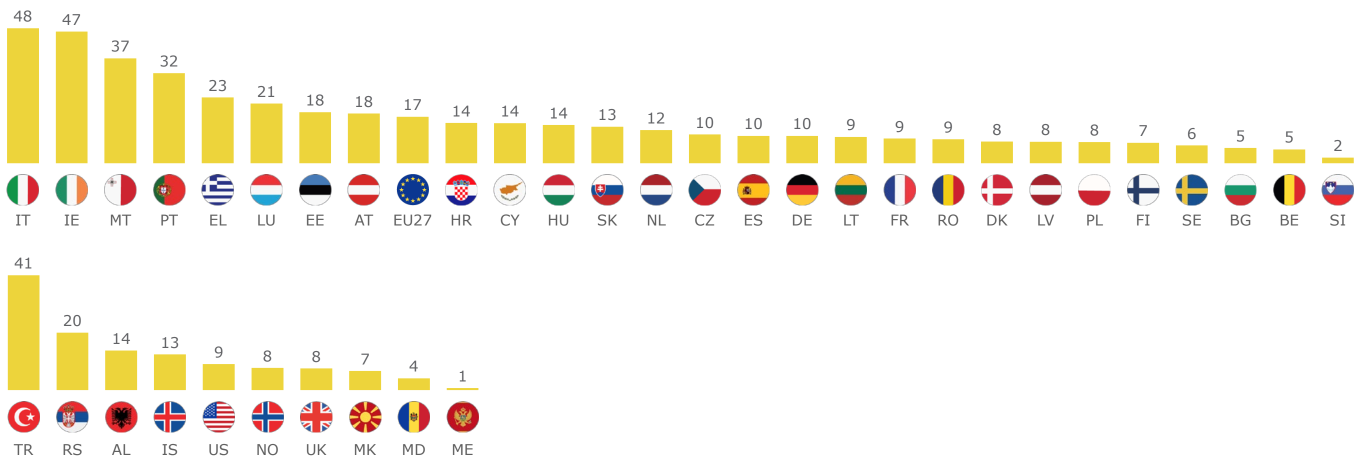
Base: SMEs offering green products and services (n=4 537 in EU27; n=1 139 in non-EU countries)

Across most countries (EU and non-EU), the proportions of SMEs selling green products or services and replying that (one of) their main market(s) for these products is **an export market** – e.g. another EU Member State, Norway or a country outside the EEA – are low compared to those for SMEs focusing on their national market. There are, however, a few exceptions. For example, in Greece and Slovenia, 40%-41% reply that their main market for green products or services consists of the Member States of the EU and /or the UK, Iceland, Liechtenstein, Norway and Switzerland. The highest shares of SMEs with an important market outside of the EEA, Switzerland and the UK are seen in Ireland and Italy (47%-48%).

Q12 In terms of turnover over the past 2 years, what were the main markets (countries/ geographical regions) for your green products or services?
% **"European Union (EU27) + UK + Iceland + Lichtenstein + Norway + Switzerland"** by country



% **"Other countries"** by country



Caution should be exercised when interpreting the results of Cyprus, Luxembourg, Malta, Albania, Moldova and Montenegro, due to the smaller number of interviews having been conducted (between 23 and 82 per country).

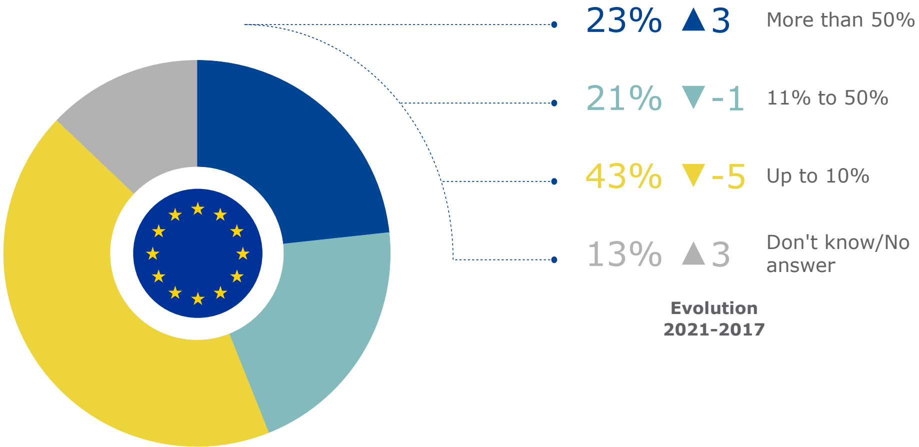
Base: SMEs offering green products and services (n=4 537 in EU27; n=1 139 in non-EU countries)

3.4. Turnover attributed to green products and services

SMEs offering green products and services were also asked how much of their annual turnover of the latest available fiscal year was attributed to these products and services.

For the largest share (43%) of SMEs selling green products and services, these products and services **make up not more than 10% of their most recent annual turnover**. About one in five (21%) reply that green products and services represent between 11% and 50% of their annual turnover and a slightly higher proportion (23%) answer that the sale of such products and services makes up more than 50% of their turnover. These results present no significant change compared to 2017.

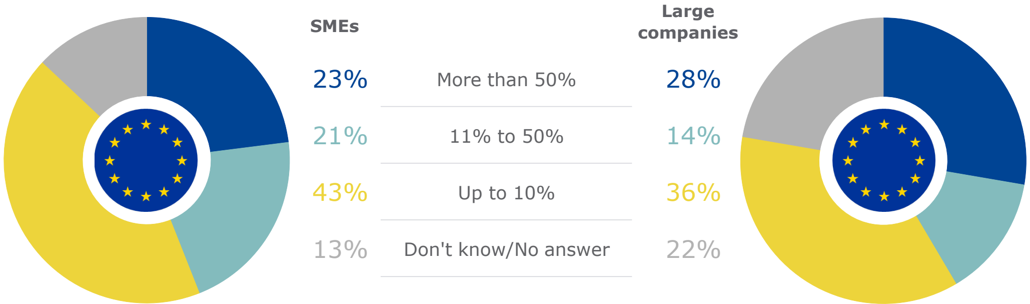
Q10 How much did these green products or services represent in your annual turnover of the latest available fiscal year? (% EU27)



Base: SMEs offering green products and services, EU27 (n=4 537 in 2021; n=3 264 in 2017)
▼▲ Evolution 2021-2017 (comparison with Flash Eurobarometer 456, Sept. 2017)

Large companies are somewhat more likely than SMEs to say that more than 50% of their annual turnover comes from green products or services (28% vs 23%). The difference is reversed for the categories 'between 11% and 50%' and 'up to 10%' of annual turnover. Among large companies, a larger share of respondents could not say how much of their annual turnover is attributed to green products and services (22% vs 13% for SMEs).

Q10 How much did these green products or services represent in your annual turnover of the latest available fiscal year? (% SMEs and large companies, EU27)



Base: SMEs offering green products and services (n=4 537) vs large companies offering green products and services (n=377), EU27

Although large companies are somewhat more likely than SMEs to answer that more than 50% of their annual turnover comes from green products or services (28% vs 23%). Focusing solely on SMEs, and comparing these in terms of number of employees (from micro to medium-sized SMEs), an opposite difference is seen with the proportion of SMEs saying that more than 50% of their annual turnover comes from green products or services being higher for micro SMEs (24%) and lower for medium-size ones (16%). Larger SMEs are more likely to provide a 'don't know' response.

Manufacturing SMEs are the most likely to say that more than 50% of their turnover comes from green products or services (31% vs 21%-22% of SMEs in the services or retail sectors and 26% of SMEs in industry). SMEs in the **retail and services sectors** are more likely to say that not more than 10% of their turnover comes from selling green products or services, particularly when compared to SMEs in manufacturing (46%-49% vs. 30%).

Q10 How much did these green products or services represent in your annual turnover of the latest available fiscal year? (% by business characteristics, EU27)

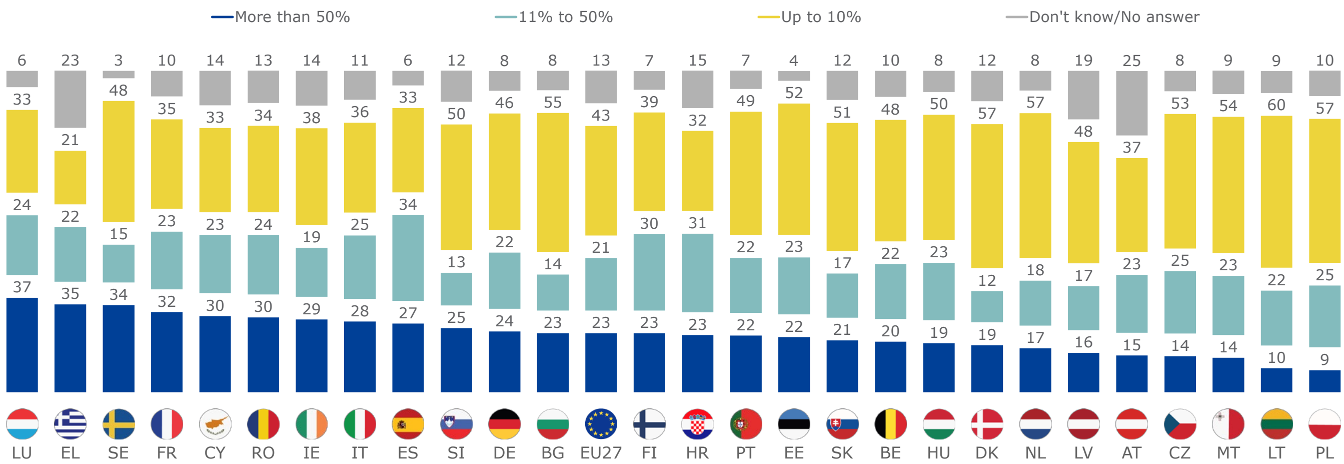
	Up to 10%	Between 11% and 50%	More than 50%	Don't know /No answer
EU27 (SMEs)	43	21	23	13
Company size				
1-9 employees	43	21	24	12
10-49 employees	46	20	20	14
50-249 employees	42	22	16	20
250+ employees	36	14	28	22
Company turnover in 2020				
Up to €100,000	52	20	22	7
€100,001-€500,000	42	24	26	8
€500,001-€2,000,000	45	22	18	15
€2,000,001-€10,000,000	45	19	27	9
More than €10,000,000	30	21	25	24
Sector of activity				
Manufacturing	30	31	31	8
Industry	36	21	26	18
Retail	49	15	21	15
Services	46	23	22	10
Company age (establishment year)				
Before 2014	45	21	21	13
Between 2014-2020	38	22	28	12
After 2020*	5	9	53	33
Selling products/services				
Products	42	21	25	13
Services	45	19	25	11
Both	44	22	20	14

Note: * results based on less than 50 interviews
Base: SMEs offering green products and services, EU27 (n=4 537) for all rows in the tables, except row '250+ employees' (n=377)

Across most Member States, the largest share of SMEs selling green products and services answer that these products and services make up **not more than 10% of their most recent annual turnover**. This response is given, for example, by 57% of respondents in Denmark, the Netherlands and Poland, and by 60% in Lithuania.

In most of the countries to the left-hand side of the figure below, SMEs are more likely to say that green products or services make up **more than 10% of their annual turnover**. In France, Sweden, Greece and Luxembourg, one in three – or more – SMEs selling green products and services state that these products and services make up more than 50% of their most recent annual turnover (between 32% and 37%).

Q10 How much did these green products or services represent in your annual turnover of the latest available fiscal year? (% by country, EU27)



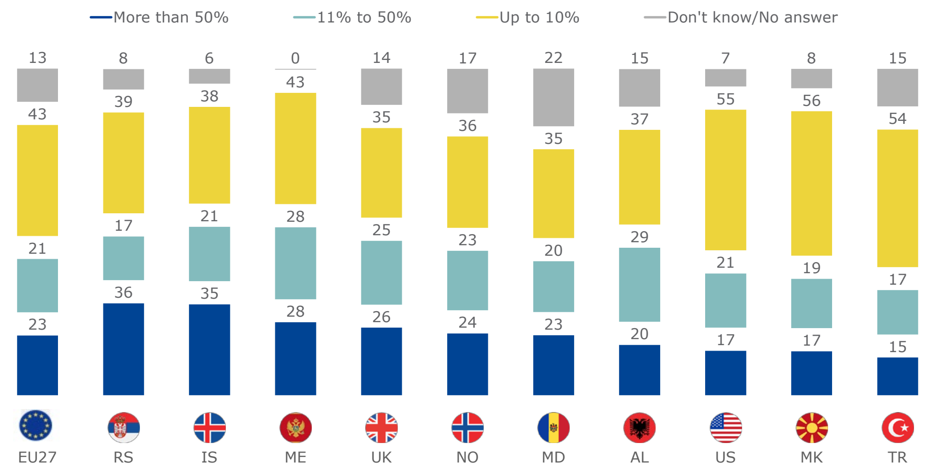
Caution should be exercised when interpreting the results of Cyprus, Luxembourg, Malta, due to the smaller number of interviews having been conducted (between 71 and 82 per country).

Base: SMEs offering green products and services (n=4 537), EU27

In the US, 55% of SMEs selling green products and services answer that these products and services make up not more than 10% of their most recent annual turnover; the average figure for the EU is somewhat lower (at 43%). Turkey and North Macedonia are close to the US, while in the **other non-EU countries** surveyed, this figure is closer to the average EU figure.

In **Iceland**, about a third (35%) of SMEs selling green products and services state that these products and services make up more than 50% of their most recent annual turnover; a similar figure is also observed for Serbia (due to smaller number of interviews in this country, this figure should be interpreted with caution).

Q10 How much did these green products or services represent in your annual turnover of the latest available fiscal year? (% by country, non-EU countries)



Caution should be exercised when interpreting the results of Albania, Moldova and Montenegro, due to the smaller number of interviews having been conducted (between 23 and 46 per country).

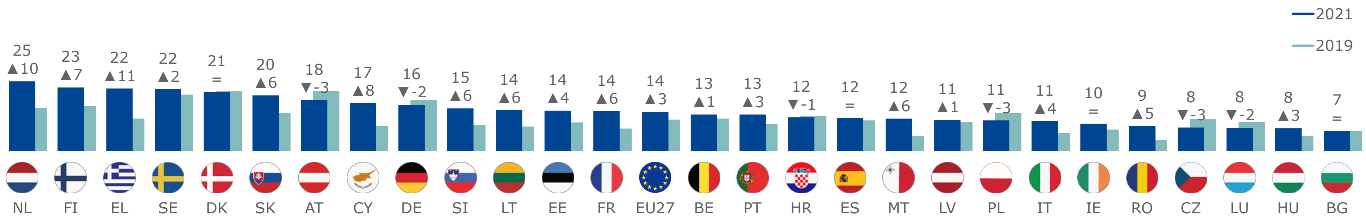
Base: SMEs offering green products and services (n=1 139), non-EU countries

Trend compared to 2017

To analyse the trend in SMEs' turnover attributed to green products or services, the results for this question are presented **taking into account all SMEs** (meaning that it is assumed that SMEs not selling green products or services also do not have any turnover attributed to these products in the latest available fiscal year).

Across the EU, 14% of SMEs say that more than 10% of their annual turnover is attributed to green products and services; this proportion has increased by three percentage points compared to 2017. Across most individual Member States, however, no significant change is observed in this proportion. The most important exceptions with an increase in SMEs with more than 10% of turnover attributed to green products and services are the Netherlands (+10 pp, to 25%) and Greece (+11 pp to 22%).

Q10 How much did these green products or services represent in your annual turnover of the latest available fiscal year? (% by country, 2021 vs 2017)



Base: all SMEs, EU27 (n=13 343 in 2021; 11 690 in 2017)
▼▲ Evolution 2021-2017 (comparison with Flash Eurobarometer 456, Sept. 2017)

Section 4. Supporting SMEs with their green offer

The analysis of green markets continues with a review of the **types of support** SMEs receive for producing their green products or services, and of SMEs' **satisfaction with the level of external support**. The final sections discuss SMEs' views on the type of support or assistance that would help them the most to launch or expand their own range of green products or services.

4.1. Type of support for the production of green products and services

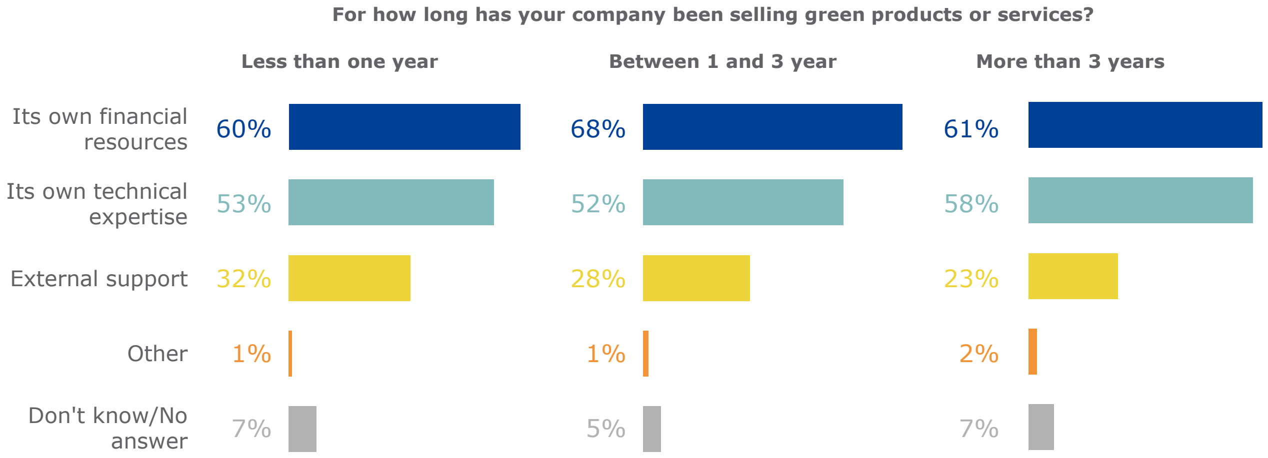
Among SMEs offering green products and services, 62% rely on their **own financial resources** and 56% on their **own technical expertise** for the production of these products and services. About a quarter (24%) of these SMEs rely on **external support.** These results present no significant change compared to 2017.

Q13 What type of support does your company rely on for the production of its green products or services? (% EU27)

Base: SMEs offering green products and services, EU27 (n=4 537 in 2021; n=3 264 in 2017)
▼▲ Evolution 2021-2017 (comparison with Flash Eurobarometer 456, Sept. 2017)

Among SMEs that **started selling green products and services in the past year**, 32% rely on external support for the production of these products and services – this figure decreases to 23% for SMEs that have been selling green products and services for more than three years. SMEs that recently introduced green products or services are somewhat less likely to rely on their own financial resources or technical expertise.

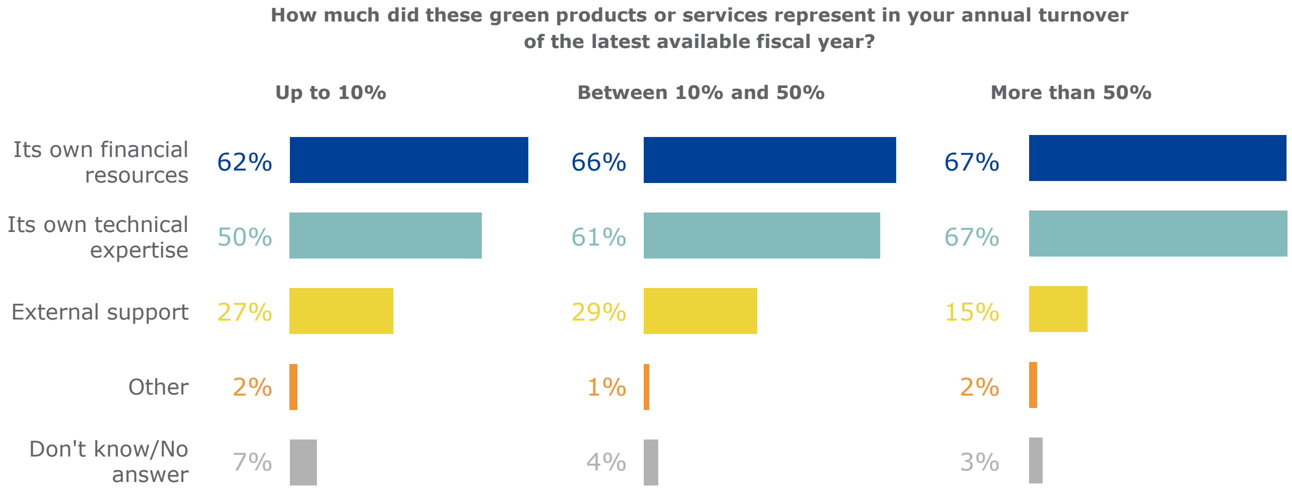
Q13 What type of support does your company rely on for the production of its green products or services? (% by how long green products and services are being offered, EU27)



Base: SMEs offering green products and services, EU27 (n=318; n=1 228; n=2 847)

Among SMEs with **more than 50% of their annual turnover coming from green products or services**, 15% rely on external support for the production of these products and services – this figure is higher for SMEs with less turnover coming from the sales of green products and services (27%-29%).

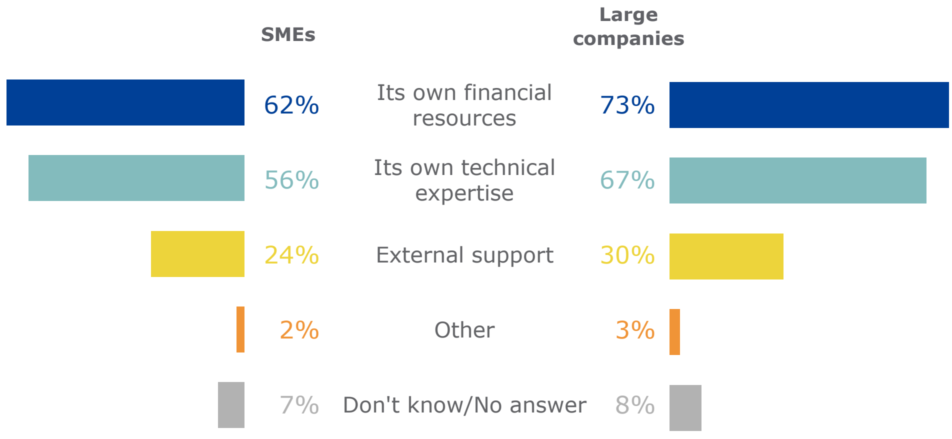
Q13 What type of support does your company rely on for the production of its green products or services? (% by share of turnover attributed to green products and services, EU27)



Base: SMEs offering green products and services, EU27 (n=1 994; n=998; n=1 002)

Compared to SMEs, **large companies** are more likely to rely on their own financial resources (73% vs 62%), their own technical expertise (67% vs 56%) and external support (30% vs 20%) for the production of green products and services.

Q13 What type of support does your company rely on for the production of its green products or services? (% SMEs and large companies, EU27)



Base: SMEs offering green products and services (n=4 537) vs large companies offering green products and services (n=377), EU27

Although large companies are more likely than SMEs to rely on each of the three types of support for the production of green products and services, among **SMEs of different size classes** the differences are much smaller. For example, among micro companies, 24% say they rely on external support, while among small companies, this figure is 30%.

For the production of green products and services, SMEs in **industry** (66%) and **manufacturing** (63%) are more likely to rely on their own technical expertise than SMEs in retail (50%) and services (55%). External support is most frequently mentioned by SMEs selling both products and services (29% vs 21%-22% for those only selling services or products).

Q13 What type of support does your company rely on for the production of its green products or services? (% by business characteristics, EU27)

	Its own financial resources	Its own technical expertise	External support	Other	Don't know /No answer
EU27 (SMEs)	62	56	24	2	7
Company size					
1-9 employees	62	56	24	2	6
10-49 employees	62	57	30	2	7
50-249 employees	64	61	27	2	6
250+ employees	73	67	30	3	8
Company turnover in 2020					
Up to €100,000	67	57	19	1	4
€100,001-€500,000	64	58	23	2	6
€500,001-€2,000,000	61	50	30	2	5
€2,000,001-€10,000,000	54	67	30	4	6
More than €10,000,000	56	57	28	1	6
Sector of activity					
Manufacturing	67	66	19	1	3
Industry	55	63	24	1	10
Retail	63	50	24	4	8
Services	63	55	27	2	5
Company age (establishment year)					
Before 2014	62	56	24	2	7
Between 2014-2020	61	59	27	2	7
After 2020*	88	26	16	0	0
Selling products/services					
Products	67	48	21	2	9
Services	57	65	22	2	5
Both	62	56	29	2	6

Note: * results based on less than 50 interviews
Base: Base: SMEs offering green products and services, EU27 (n=4 537)
for all rows in the tables, except row '250+ employees' (n=377)

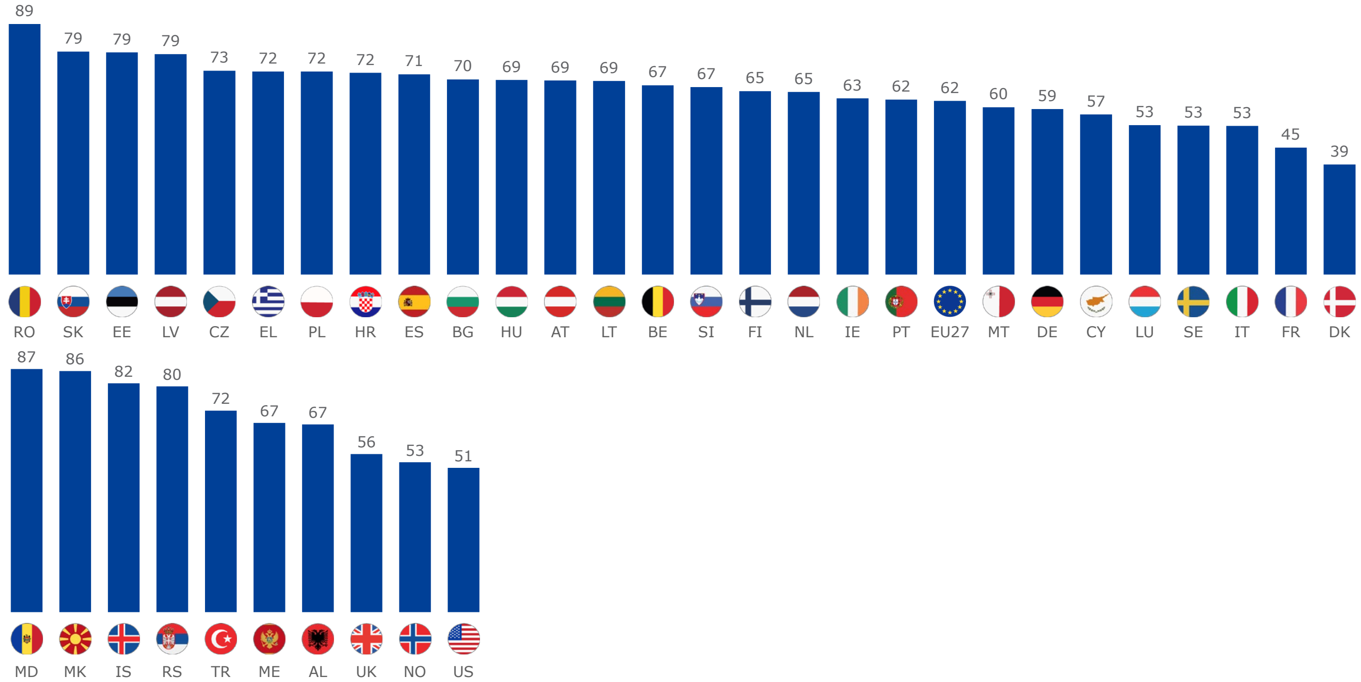
Analysis by country

In 21 Member States, SMEs are most likely to say they rely on their **own financial resources** for the production of green products or services. The proportion selecting this response is overall the highest in Romania (89%), followed by Estonia, Latvia and Slovakia (all 79%). In Denmark and France, less than half of respondents rely on their own financial resources (39% and 45%, respectively).

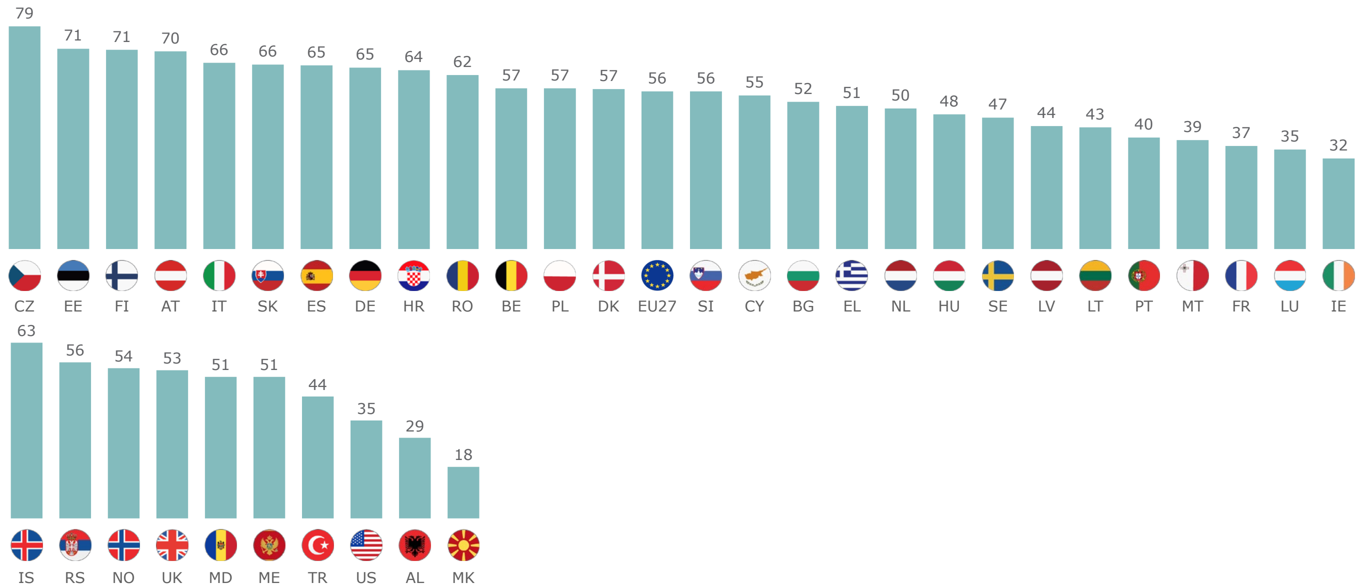
In the remaining six Member States, SMEs are most likely to say they rely on their **own technical expertise** for the production of green products or services. In Czechia, 79% of SMEs offering green products and services say they rely on their own technical expertise. This figure is 70% in Austria, and 71% in Finland and Estonia.

Q13 What type of support does your company rely on for the production of its green products or services?

% **"Its own financial resources"** by country



% **"Its own technical expertise"** by country

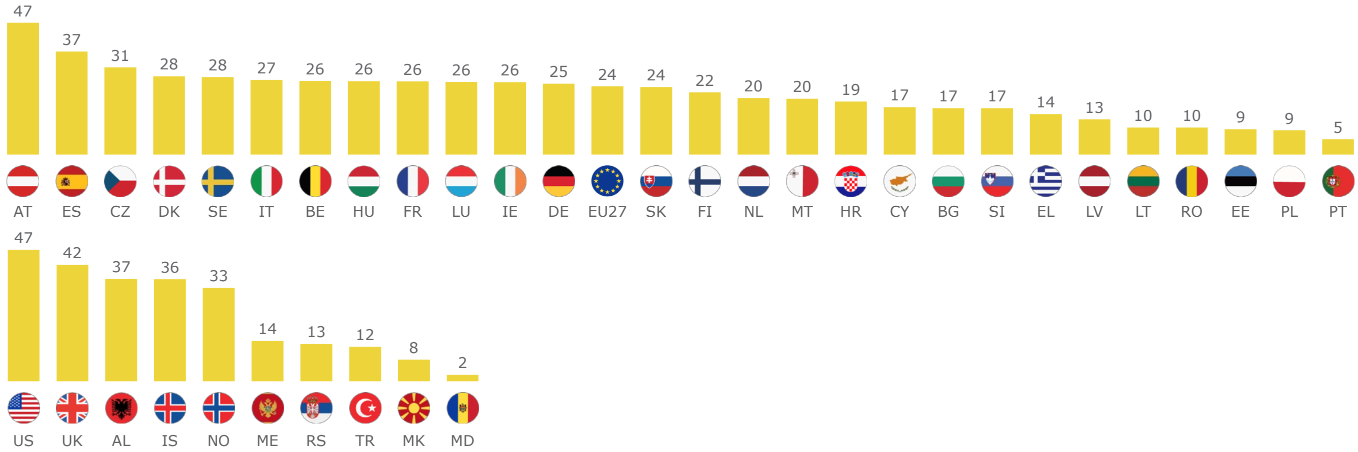


Caution should be exercised when interpreting the results of Cyprus, Luxembourg, Malta, Albania, Moldova and Montenegro, due to the smaller number of interviews having been conducted (between 23 and 82 per country).

Base: SMEs offering green products and services (n=4 537 in EU27; n=1 139 in non-EU countries)

Among SMEs in the EU offering green products or services, 24% say they rely on **external support** for the production of these products or services. At the individual country level, Austria stands out with 47% of SMEs saying this, followed by Spain (37%) and Czechia (31%). The lowest proportion of SMEs relying on external support for the production of their green products or services is seen in Portugal (5%).

Q13 What type of support does your company rely on for the production of its green products or services?
% **"External support"** by country



Caution should be exercised when interpreting the results of Cyprus, Luxembourg, Malta, Albania, Moldova and Montenegro, due to the smaller number of interviews having been conducted (between 23 and 82 per country).

Base: SMEs offering green products and services (n=4 537 in EU27; n=1 139 in non-EU countries)

There is also a large variation across the **non-EU countries** in the proportion of SMEs offering green products or services and relying on external support for the production of these products and services; from 2% in Moldova to 47% in the US. The figure for the US is the same as in Austria; in all other EU Member States, fewer SMEs than in the US rely on external support.

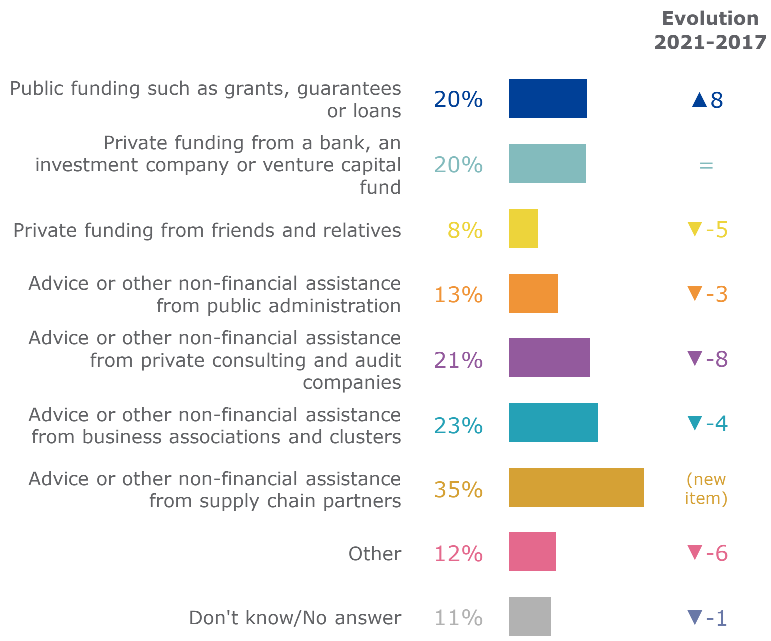
Types of external support used by SMEs to produce green products or services

SMEs relying on external support for the production of green products or services were asked for more details about the type of external support they receive; they were presented with a list of seven types of support.

One in five SMEs relying on external support for the production of green products or services say they receive **public funding**, such as grants, guarantees or loans (+8 pp compared to 2017). Another one in five of these SMEs receive **private funding** from a bank, investment company or venture capital fund, and just under one in ten (8%) receive private funding from friends and relatives.

The largest share (35%) of SMEs relying on external support for the production of green products or services receive **advice or other non-financial assistance** from supply chain partners, followed by 23% mentioning this type of support from business associations and clusters, and 21% from private consulting and audit companies. Just over one in ten (13%) of SMEs receive advice or other non-financial assistance from public administration.

DX1 More precisely, which type of external support is it? (% EU27)



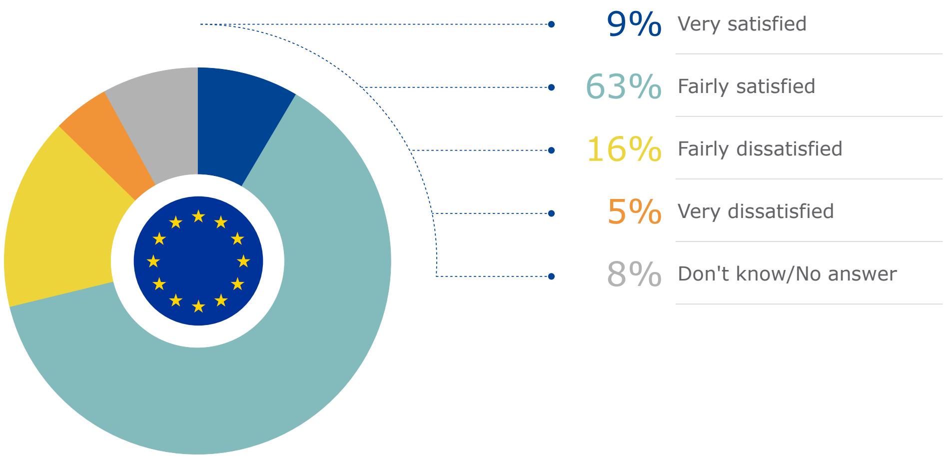
Base: SMEs that rely on external support for the production of green products or services, EU27 (n=1 150 in 2021; 815 in 2017)

Satisfaction with the level of public support received

Among SMEs relying on external support for the production of green products or services, 29% reply that this support comes in the form of public support – such as public funding (grants, loans and subsidies), or advice and other non-financial assistance from public administration.

Among these SMEs, more than seven in ten report being satisfied with the **level of public support for their green products or services**: 9% say they are very satisfied and 63% are fairly satisfied. Fewer of these SMEs say they are not satisfied (16% 'fairly dissatisfied' and 5% 'very dissatisfied' responses).

DX2 How satisfied or dissatisfied are you with the level of public support for your green products or services? (% EU27)

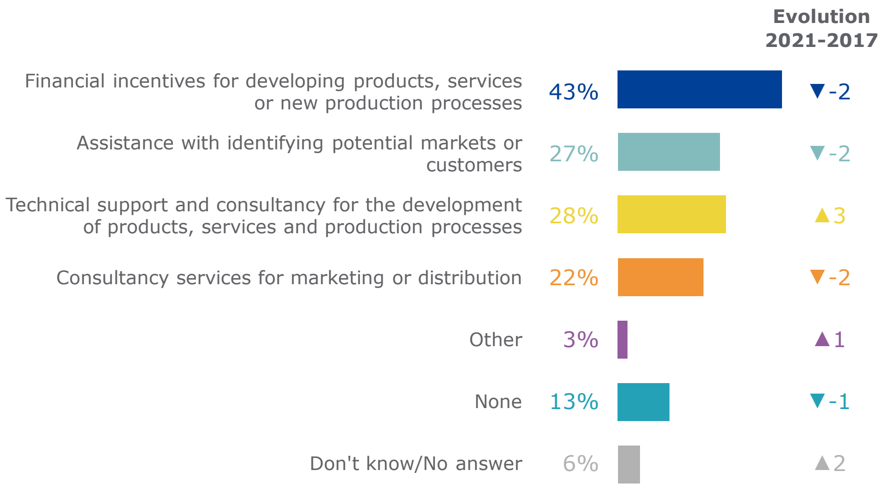


Base: SMEs that receive public support for the production of green products or services, EU27 (n=432)

4.2. Support to expand green offer

SMEs that sell green products or services were asked what kind of support would help them the most to expand their green offer. Over four in ten (43%) of these SMEs say that **financial incentives for developing products, services or new production processes** would help them the most. Financial incentives are much more likely to be mentioned than assistance with identifying potential markets or customers (27%), technical support or consultancy for the development of new products, services or production processes (28%) and consultancy for marketing or distribution (22%). Just over one in ten SMEs (13%) answer that none of the types of support listed in the survey would help them to expand their range of green products or services. These results present no significant change compared to 2017.

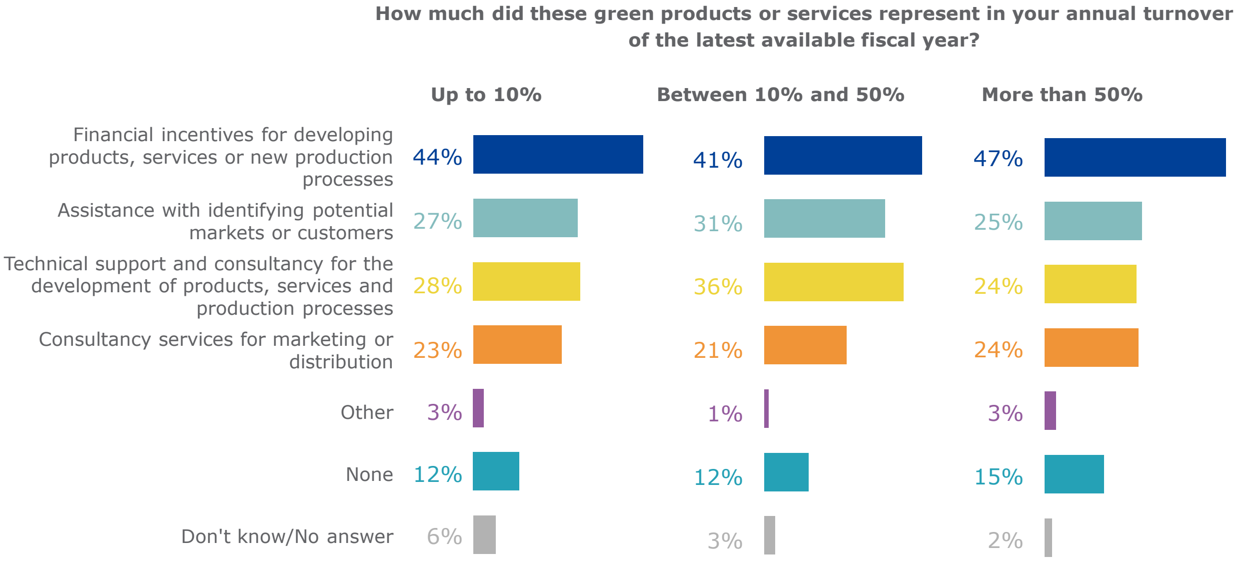
DX3 What type of support would help you the most to expand your range of green products or services? (% EU27)



Base: SMEs offering green products and services, EU27 (n=4 537 in 2021; n=3 264 in 2017)
▼▲ Evolution 2021-2017 (comparison with Flash Eurobarometer 456, Sept. 2017)

In each of the three categories of SMEs with different shares of turnover coming from the sale of green products and services (from up to 10% to more than 50%), the largest share of respondents think that **financial incentives for developing products, services or new production processes** would help their SME the most to expand their offer of green products or services (between 41% and 47%). SMEs with between 10% and 50% of turnover coming from the sale of green products and services are somewhat more likely than their counterparts in the other categories to reply that technical support and consultancy for developing products, services or new production processes and assistance with identifying potential markets or customers would help them the most.

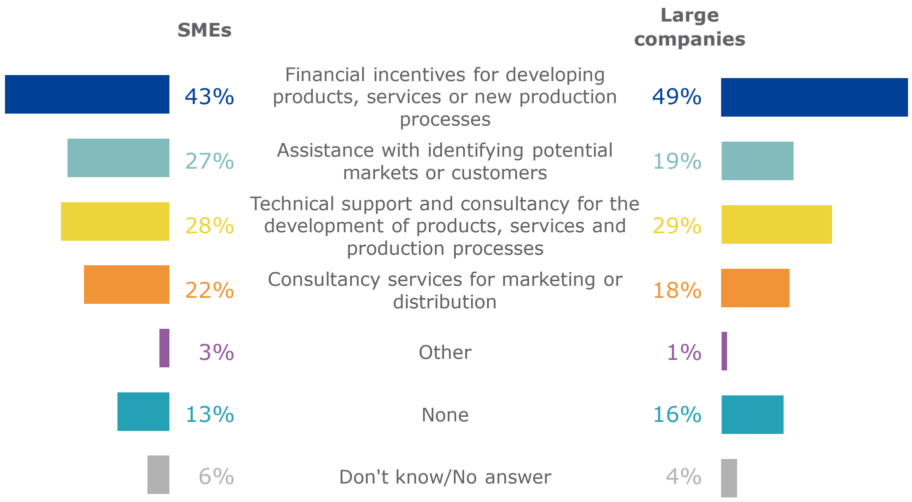
DX3 What type of support would help you the most to expand your range of green products or services? (% by share of turnover attributed to green products and services, EU27)



Base: SMEs offering green products and services, EU27 (n=1 994; n=998; n=1 002)

Both among SMEs and **large companies**, the largest share of respondents reply that **financial incentives for developing products, services or new production processes** would help their company the most to expand their offer of green products or services (43% and 49%, respectively). Compared to large companies, SMEs are more likely to reply that assistance with identifying potential markets or customers would help them the most (27% vs 19%).

DX3 What type of support would help you the most to expand your range of green products or services? (% SMEs vs large companies, EU27)



Base: SMEs offering green products and services (n=4 537)
vs large companies offering green products and services (n=377), EU27

Across all types of SMEs, the largest share of respondents think that **financial incentives for developing products, services or new production processes** would help their company the most to expand their offer of green products or services (between 40% and 51%).

An analysis by **sector** shows that SMEs in industry and services are more likely than their counterparts in retail to think that technical support and consultancy for developing products, services or new production processes would help them the most to expand their offer of green products or services (33% vs 21%). SMEs in industry, on the other hand, are less likely than their counterparts to think that consultancy for marketing or distribution of their green products would be the most helpful (13% compared to, for example, 28% of SMEs in the retail sector).

DX3 What type of support would help you the most to expand your range of green products or services? (% by business characteristics, EU27)

	Financial incentives for developing products, services or new production processes	Assistance with identifying potential markets or customers	Technical support and consultancy for the develop-ment of products, services and production processes	Consultancy services for marketing or distribution	Other	None	Don't know/No answer
EU27 (SMEs)	43	27	28	22	3	13	6
Company size							
1-9 employees	43	27	28	22	2	14	5
10-49 employees	48	29	28	24	2	11	5
50-249 employees	51	29	28	18	2	12	6
250+ employees	49	19	29	18	1	16	4
Company turnover in 2020							
Up to €100,000	44	28	27	21	3	14	4
€100,001-€500,000	46	27	30	22	0	12	5
€500,001-€2,000,000	41	29	31	23	2	12	4
€2,000,001-€10,000,000	47	21	21	25	7	17	4
More than €10,000,000	45	25	39	24	1	9	3
Sector of activity							
Manufacturing	51	28	25	22	2	11	5
Industry	44	25	33	13	4	15	6
Retail	43	30	21	28	2	15	5
Services	40	24	33	22	2	12	6
Company age (establishment year)							
Before 2014	43	27	28	22	2	13	6
Between 2014-2020	41	25	26	26	3	16	4
After 2020*	43	19	33	5	0	27	10
Selling products/services							
Products	45	29	26	25	2	13	6
Services	43	22	30	19	3	15	5
Both	41	29	29	23	3	12	5

Note: * results based on less than 50 interviews
Base: SMEs offering green products and services, EU27 (n=4 537) for all rows in the tables, except row '250+ employees' (n=377)

Analysis by country

In line with the EU average results, in 25 Member States, the largest share of SMEs selling green products or services say that **financial incentives for developing products, services or new production processes** would help their SME the most to expand their offer. In five Member States, at least 60% of respondents think that financial incentives would help the most: Slovakia (60%), Romania (61%), Croatia (64%), Slovenia (65%) and Cyprus (70%).

In Greece and Spain, 43% of SMEs selling green products or services say **assistance with identifying potential markets or customers** would help them the most to expand their offer. In half of the Member States, however, less than a quarter of respondents think this measure would be the most helpful.

The results for the remaining types of support are similar to those for assistance with identifying potential markets or customers. In Spain, 41% of respondents say that **technical support and consultancy for the development of products, services and production processes** would help them the most. In the countries at the bottom of the country ranking, less than one in five respondents share this view. In Belgium (34%) and France (31%), this type of support is the top-ranking response. Between 13% of SMEs in Poland and 40% in Romania answer that **consultancy services for marketing or distribution** would help them the most to launch additional green products or services.

SMEs selling green products or services in Germany, Denmark and the Netherlands are the most likely to say that none of the types of support listed in the survey would help them to expand their offer (between 20% and 23%). In eight countries, less than one in ten respondents say the same (e.g. 2% in Greece, 4% in Croatia and 7% in Slovenia). As noted earlier in this report, there are two possible reasons for SMEs to reply that none of the types of support listed in the survey would help them: (1) they find the types of support listed in the survey not adequate, or (2) the SMEs are not looking for/do not see a need for support.

DX3 What type of support would help you the most to expand your range of green products or services? (% by country, EU27)

	Financial incentives for developing products, services or new production processes	Assistance with identifying potential markets or customers	Technical support and consultancy for the development of products, services and production processes	Consultancy services for marketing or distribution	Other	None	Don't know/No answer
EU27	43	27	28	22	3	13	6
BE	28	29	34	32	5	11	7
BG	55	21	12	25	4	11	7
CZ	32	25	30	24	3	17	0
DK	26	19	26	17	2	21	13
DE	39	28	30	22	3	20	1
EE	43	19	23	23	6	16	6
IE	44	32	22	18	2	6	15
EL	59	43	33	23	0	2	1
ES	57	43	41	21	0	5	2
FR	25	22	31	19	3	16	10
HR	64	10	33	20	4	4	3
IT	47	18	14	25	5	11	12
CY	70	34	27	30	0	5	2
LV	48	24	17	25	0	14	4
LT	58	21	24	17	2	14	1
LU	37	29	32	33	2	8	5
HU	44	15	14	28	2	17	9
MT	47	20	26	32	7	18	0
NL	35	22	26	25	1	23	6
AT	42	30	27	25	1	17	5
PL	52	22	31	13	1	14	6
PT	35	25	27	24	5	10	1
RO	61	31	24	40	2	8	1
SI	65	22	19	17	4	7	2
SK	60	31	26	21	1	11	1
FI	46	27	28	20	2	14	0
SE	36	29	36	19	1	17	1

Caution should be exercised when interpreting the results of Cyprus, Luxembourg, Malta, due to the smaller number of interviews having been conducted (between 71 and 82 per country).

Most-frequently selected response shown in green
Base: SMEs offering green products and services (n=4 537), EU27

In most of the **non-EU countries**, the largest share of SMEs selling green products or services say that financial incentives for developing products, services or new production processes would help their SME the most to expand their offer (between 41% in the US and 89% in Montenegro). In Turkey, a somewhat larger share mention technical support and consultancy for the development of products, services or new production processes (45%).

DX3 What type of support would help you the most to expand your range of green products or services? (% by country, non-EU countries)

	Financial incentives for developing products, services or new production processes	Assistance with identifying potential markets or customers	Technical support and consultancy for the development of products, services and production processes	Consultancy services for marketing or distribution	Other	None	Don't know/No answer
EU27	43	27	28	22	3	13	6
UK	35	30	33	18	0	17	6
TR	41	34	45	15	0	9	4
MK	68	18	17	22	4	3	0
ME	89	27	11	7	0	0	0
RS	65	46	22	10	1	8	0
AL	55	17	27	4	1	20	20
IS	48	21	27	21	0	28	0
NO	53	23	28	23	3	11	6
MD	59	25	43	34	0	0	10
US	41	34	34	16	1	12	4

Caution should be exercised when interpreting the results of Albania, Moldova and Montenegro, due to the smaller number of interviews having been conducted (between 23 and 46 per country).

Most-frequently selected response shown in green
Base: SMEs offering green products and services (n=1 139), non-EU countries

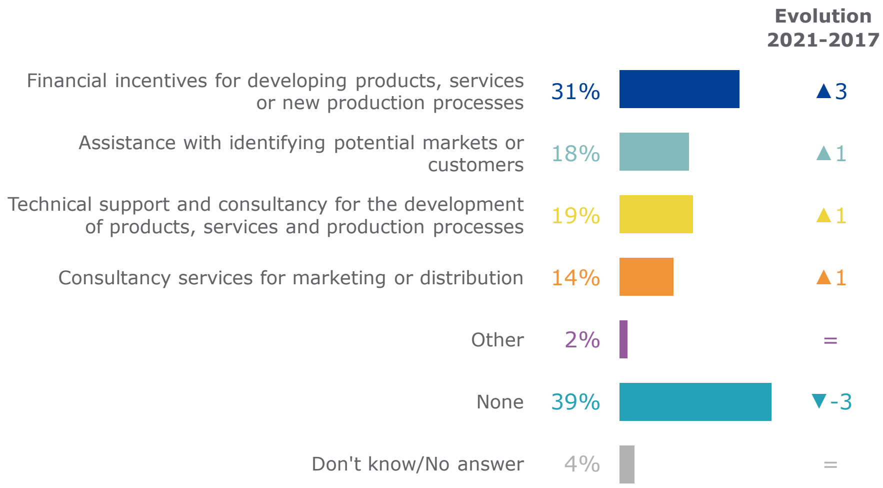
4.3. Support to launch green offer

SMEs not currently offering green products or services were asked what kind of support would help them the most to launch a range of green products or services. They were presented with the same list of support measures as for SMEs already offering green products or services (see previous section).

Among SMEs not currently offering green products or services, **financial incentives for developing new products, services or production processes** are the most-mentioned type of support (31%). This measure is followed by technical support and consultancy for developing new products, services or production processes (19%) and assistance with identifying potential customers or markets (18%). The last type of support – consultancy services for marketing or distribution – is selected by 14%.

While 13% of SMEs currently offering green products or services reply that none of the types of support would help them to expand their offer (see previous section), among SMEs not offering green products or services, three times as many respondents (39%) reply that none of the support measures would help them to launch a range of green products or services.

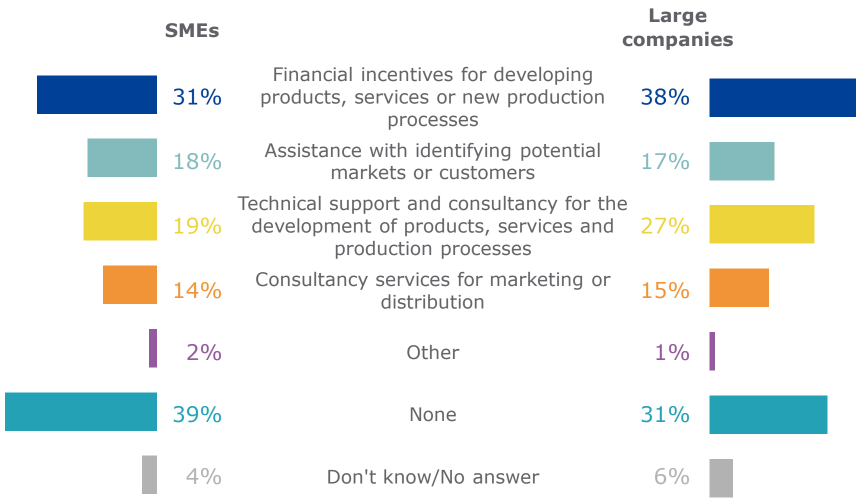
DX4 What type of support would help you the most to launch your range of green products or services? (% EU27)



Base: SMEs not offering green products and services, EU27 (n=8 210 in 2021; n=7 784 in 2017)
▼▲ Evolution 2021-2017 (comparison with Flash Eurobarometer 456, Sept. 2017)

Both among SMEs and **large companies**, the largest share of respondents think that financial incentives would help their company the most to launch a range of green products or services (31% and 38%, respectively). Compared to SMEs, large companies are more likely to reply that technical support and consultancy for the development of products, services and production processes would help them the most to launch their own range of green products or services (27% vs 19% among SMEs).

DX4 What type of support would help you the most to launch your range of green products or services? (% SMEs vs large companies, EU27)



Base: SMEs not offering green products and services (n=8 210)
vs large companies not offering green products and services (n=435), EU27

Micro companies (not yet selling green products or services) are more likely than larger SMEs to say that none of the types of support listed in the survey would help them to launch their own range of green products or services (40% vs 33%-34%). The opinion that none of the types of support would help is also more frequently shared by SMEs established before 2014 (41% vs 31% of those established between 2014 and 2020).

The larger the SME, the more likely they are to say that financial incentives and/or technical support for developing products, services or new production processes would help their SME the most to launch their own range of green products or services.

SMEs in the **services and retail sectors** are somewhat more likely than their counterparts in industry and manufacturing to reply that consultancy for marketing or distribution would help them the most to launch their own range of green products or services (15%-16% vs 10%-12).

DX4 What type of support would help you the most to launch your range of green products or services? (% by business characteristics, EU27)

	Financial incentives for developing products, services or new production processes	Assistance with identifying potential markets or customers	Technical support and consultancy for the develop-ment of products, services and production processes	Consultancy services for marketing or distribution	Other	None	Don't know/No answer
EU27 (SMEs)	31	18	19	14	2	39	4
Company size							
1-9 employees	31	18	19	14	2	40	4
10-49 employees	35	20	26	14	2	33	3
50-249 employees	37	18	25	12	2	34	5
250+ employees	38	17	27	15	1	31	6
Company turnover in 2020							
Up to €100,000	32	18	19	14	2	39	4
€100,001-€500,000	33	21	20	15	1	38	4
€500,001-€2,000,000	31	20	20	10	2	41	2
€2,000,001-€10,000,000	35	10	18	13	7	38	3
More than €10,000,000	33	25	26	10	2	32	3
Sector of activity							
Manufacturing	33	20	23	12	1	39	4
Industry	32	16	21	10	2	40	4
Retail	30	19	18	16	3	38	3
Services	31	18	18	15	2	40	4
Company age (establishment year)							
Before 2014	31	17	19	13	2	41	3
Between 2014-2020	34	22	20	18	3	31	6
After 2020*	9	9	7	14	0	67	3
Selling products/services							
Products	29	20	19	15	4	38	4
Services	32	16	17	13	2	42	5
Both	32	20	23	16	1	36	3

Note: * results based on less than 100 interviews
Base: SMEs not offering green products and services, EU27 (n=8 210) for all rows in the tables, except row '250+ employees' (n=435)

Analysis by country

In about half of the Member States, the largest share of SMEs currently not selling green products or services say that none of the types of support listed in the survey would help them to launch a range of green products or services. This proportion is the highest in Malta (62%), followed by Italy (53%), Denmark (49%) and Estonia (48%).

In the other half of the Member States, respondents are more likely to say that **financial incentives for developing products, services or new production processes** would help their SME the most to launch their own range of green products or services. This proportion is the highest in Romania (54%), Greece (51%), Cyprus and Croatia (both 48%).

In Spain, 31% of SMEs currently not selling green products or services say **assistance with identifying potential markets or customers** would help them the most to launch their own green products or services; in Malta, on the other hand, just 4% of respondents say the same. Between 10% of SMEs in Estonia and 31% in Belgium and Romania say that **technical support and consultancy for the development of products, services and production processes** would help them the most to launch their own green products or services. Similarly, between 7% of SMEs in Denmark and 29% in Romania answer that **consultancy services for marketing or distribution** would help them the most.

DX4 What type of support would help you the most to launch your range of green products or services? (% by country, EU27)

	Financial incentives for developing products, services or new production processes	Assistance with identifying potential markets or customers	Technical support and consultancy for the development of products, services and production processes	Consultancy services for marketing or distribution	Other	None	Don't know/No answer
EU27	31	18	19	14	2	39	4
BE	28	24	31	13	1	32	2
BG	31	12	15	14	1	33	9
CZ	26	17	17	15	2	45	4
DK	19	13	14	7	2	49	8
DE	23	22	18	18	2	44	3
EE	29	20	10	11	1	48	2
IE	42	22	22	22	5	17	4
EL	51	29	30	23	0	18	1
ES	44	31	28	10	1	26	4
FR	20	19	12	16	2	47	4
HR	48	10	18	11	2	30	3
IT	27	7	13	9	4	53	4
CY	48	19	17	12	0	36	2
LV	46	19	17	15	1	27	0
LT	41	19	20	14	1	31	1
LU	22	21	23	13	8	43	2
HU	40	12	22	13	1	37	3
MT	17	4	14	8	3	62	11
NL	13	16	17	17	0	47	6
AT	34	19	16	27	2	37	3
PL	33	10	17	13	2	43	5
PT	40	18	27	13	5	17	7
RO	54	28	31	29	0	14	2
SI	42	14	20	11	2	39	0
SK	39	26	23	13	2	29	4
FI	34	13	20	10	2	36	5
SE	33	26	25	14	0	31	4

Caution should be exercised when interpreting the results of Cyprus, Luxembourg, Malta, due to the smaller number of interviews having been conducted (between 71 and 82 per country).

Most-frequently selected response shown in green

Base: SMEs not offering green products and services (n=8 210), EU27

In most of the **non-EU countries**, the largest share of SMEs currently not selling green products or services say that financial incentives for developing products, services or new production processes would help their SME the most to launch their own range of green products or services. This proportion varies between 28% in Iceland and 48% in Serbia. **In the US**, the proportion selecting this type of support is higher than in the EU, on average (40% vs 31%).

As for the EU average results, in **the UK** and in **Iceland**, the largest share of SMEs reply that none of the types of support listed in the survey would help them to launch a range of green products or services (38% in both countries).

DX3 What type of support would help you the most to expand your range of green products or services? (% by country, non-EU countries)

	Financial incentives for developing products, services or new production processes	Assistance with identifying potential markets or customers	Technical support and consultancy for the development of products, services and production processes	Consultancy services for marketing or distribution	Other	None	Don't know/No answer
EU27	31	18	19	14	2	39	4
UK	38	17	22	17	1	38	3
TR	43	27	26	22	0	25	3
MK	46	11	18	20	1	18	7
ME	46	32	16	17	0	19	6
RS	48	27	18	15	1	23	5
AL	42	9	9	22	4	40	0
IS	28	12	33	15	1	38	1
NO	43	11	23	23	0	26	6
MD	46	48	22	38	0	8	0
US	40	14	16	7	1	38	5

Caution should be exercised when interpreting the results of Albania, Moldova and Montenegro, due to the smaller number of interviews having been conducted (between 57 and 68 per country).

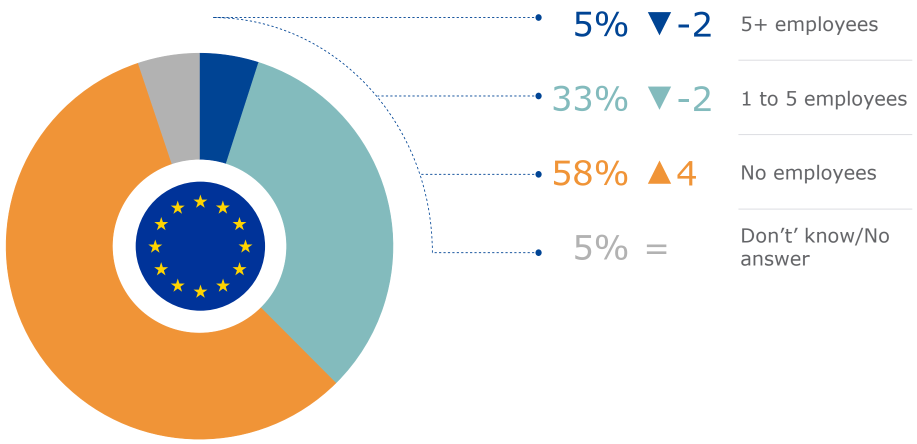
Most-frequently selected response shown in green
Base: SMEs not offering green products and services (n=1 913), non-EU countries

Section 5. Green jobs

At the end of the survey, respondents were asked if there are any full-time employees in their SME working in green jobs. In the context of the survey, a **'green job'** was defined as one that **directly deals with information, technologies, or materials that preserve or restore environmental quality**. This type of job would require specialised skills, knowledge, training or experience (e.g. verifying compliance with environmental legislation, monitoring resource efficiency within the company, promoting and selling green products and services). As such, the total amount of green jobs measured by this Eurobarometer survey is **linked both to resource-efficiency processes and to the production of green products and services, as well as to compliance with environmental legislation**. Examples include a chemical technician testing air samples for pollution emission levels of the production process, a worker contributing to the production of machinery that reduces pollution emissions, or an operator of renewable energy equipment to produce electricity for use within the company.

As shown in the chart below, just under four in ten SMEs have **at least one full-time employee working in a green job some or all of the time**: 33% say there are between one and five 'green' employees in their SME and 5% report that their number is higher than five. The results of the current survey show a small decrease in the proportion of SMEs with at least one 'green' employee.

DX5 In your company, how many of your full-time employees, including yourself, work in green jobs some or all of the time? (% EU27)



Base: all SMEs, EU27 (n=13 343 in 2021; 11 690 in 2017)
▼▲ Evolution 2021-2017 (comparison with Flash Eurobarometer 456, Sept. 2017)

Green SMEs – i.e. those investing in resource efficiency, with a carbon reduction strategy in place and/or producing green products or services – are more likely to have at least one full-time employee working in a green job some or all of the time. For example, the analysis presented in the following table shows that:

- The **more resource efficiency actions** an SME is undertaking, the more likely they are to have at least one employee in a green job: 46% of those taking many actions have at least one green employee compared to 18% of SMEs taking no action.
- Companies that **offer green products or services** are the most likely to have at least one green employee (58%), followed by those planning to offer such products or services (36%). In comparison, 26% of companies with no plans to offer green products or services have at least one employee in a green job.

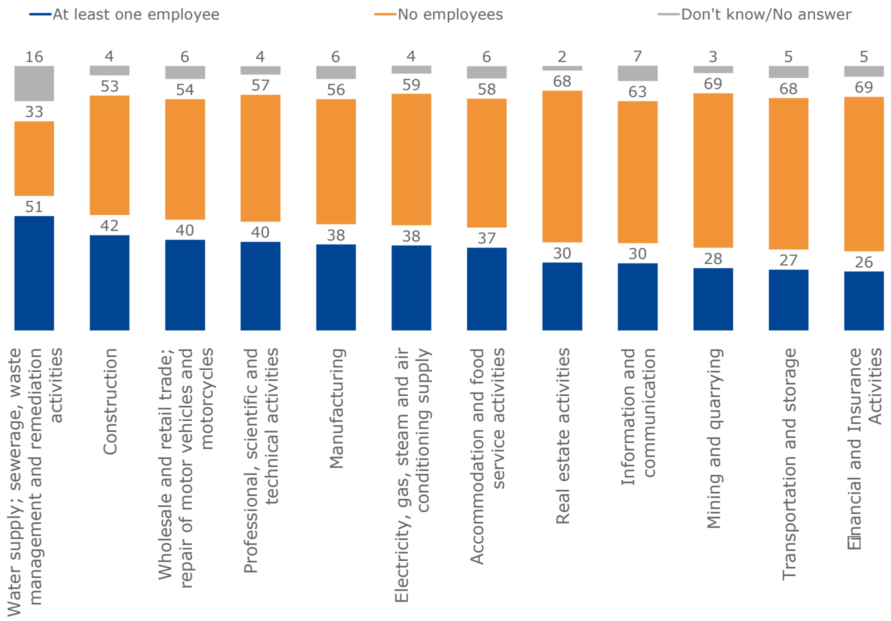
DX5 In your company, how many of your full-time employees, including yourself, work in green jobs some or all of the time? (% by 'green' characteristics, EU27)

	At least one employee	No employees	Don't know /No answer
EU27 (SMEs)	37	58	5
Resource efficiency actions taken			
Many actions	46	50	4
Some actions	37	58	5
Few actions	29	64	7
No actions	18	79	3
Investment in efficiency measures			
More than 5% of annual turnover	50	46	5
1%-5% of annual turnover	47	49	4
Less than 1% of annual turnover	35	62	4
Nothing (or not taking actions)	26	69	4
Carbon reduction strategy			
Concrete strategy in place	51	43	5
No, but planning to do so	42	52	6
No, not planning to do so	30	67	4
Offering green products and services			
Yes	58	36	7
No, but planning to do so	36	59	5
No, not planning to do so	26	70	4
Turnover attributed to green products and services			
More than 50%	68	26	7
Between 11% and 50%	64	32	4
Up to 10%	52	43	5
No green products/services	26	70	4

Base: all SMEs, EU27 (n=13 343)

There are also **differences in the proportion of SMEs with at least one 'green' employee across the different NACE sectors**. This proportion varies between 26% in the sector of financial and insurance activities and 51% in the sector of water supply, sewerage, waste and remediation. Most service sectors are found to the right-hand side of the chart with fewer SMEs with at least one green employee (e.g. 30% in information and communication services), while in the wholesale and retail trade sector, this proportion is higher – at 40%.

DX5 In your company, how many of your full-time employees, including yourself, work in green jobs some or all of the time? (% by NACE sector, EU27)



Base: all SMEs (n=13 343), EU27

Large companies are more likely than SMEs to have one or more employees working in a green job: 24% say there are between one and five 'green' employees in their company and 31% report that their number is higher than five. SMEs are more likely not to have any employees in green jobs: 58% vs 26% for large companies.

DX5 In your company, how many of your full-time employees, including yourself, work in green jobs some or all of the time? (% SMEs and large companies, EU27)

Base: all SMEs (n=13 343) vs all large companies (n=872), EU27

The **largest SMEs** (with between 50 and 249 employees) are the most likely to have at least one full-time employee working in a green job some or all of the time (48% vs 37% for micro companies). Among SMEs with an **annual turnover** exceeding €2,000,000, more than 40% have at least one green employee; the proportion is somewhat lower for SMEs with lower turnover values.

SMEs **established between 2014 and 2020** are the most likely to have at least one employee in a green job (41% vs 33% of SMEs established after 2020 and 36% of those established before 2014).

Finally, in line with the differences observed by NACE sector (discussed earlier in this section), SMEs only **selling services** are less likely than those **selling products** (or both products and services) to have an employee in a green job (34% vs 39%-40%).

DX5 In your company, how many of your full-time employees, including yourself, work in green jobs some or all of the time? (% by business characteristics, EU27)

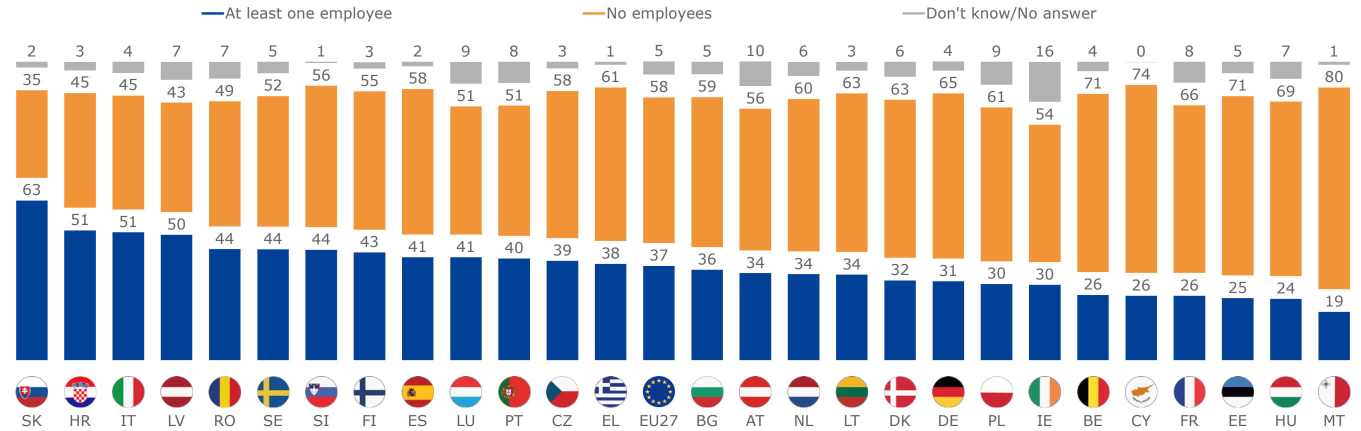
	At least one employee	No employees	Don't know /No answer
EU27 (SMEs)	37	58	5
Company size			
1-9 employees	37	58	5
10-49 employees	42	51	7
50-249 employees	48	41	11
250+ employees	55	26	19
Company turnover in 2020			
Up to €100,000	38	58	4
€100,001-€500,000	38	59	4
€500,001-€2,000,000	33	63	5
€2,000,001-€10,000,000	47	45	8
More than €10,000,000	45	44	11
Sector of activity			
Manufacturing	38	56	6
Industry	42	54	5
Retail	40	54	6
Services	33	62	5
Company age (establishment year)			
Before 2014	36	58	5
Between 2014-2020	41	55	4
After 2020	33	62	4
Selling products/services			
Products	40	54	6
Services	34	61	4
Both	39	55	6

Base: all SMEs, EU27 (n=13 343) for all rows in the tables, except row '250+ employees' (n=872)

Analysis by country

The proportion of SMEs with **at least one employee in a green job (some or all the time)** ranges from 19% in Malta to 63% in Slovakia. In Croatia, Latvia and Italy, about half of SMEs (50%-51%) have at least one green employee. Other countries at the lower end of the country ranking are Hungary (24%), Estonia (25%), and Cyprus, Belgium and France (all 26%).

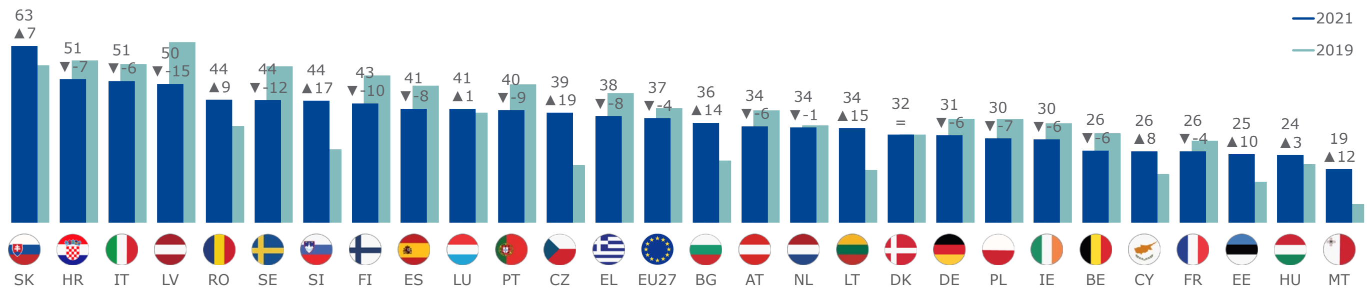
DX5 In your company, how many of your full-time employees, including yourself, work in green jobs some or all of the time? (% by country, EU27)



Base: all SMEs, EU27 (n=13 343)

Although the average proportion of SMEs across the EU with at least one full-time employee working in a green job has decreased since 2017 (-4 pp), in a number of Member States, an opposite trend is seen. The largest increases in this figure are seen in Czechia (+19 pp, to 39%), Slovenia (+17 pp, to 44%), Lithuania (+15 pp, to 34%) and Bulgaria (+14 pp, to 36%).

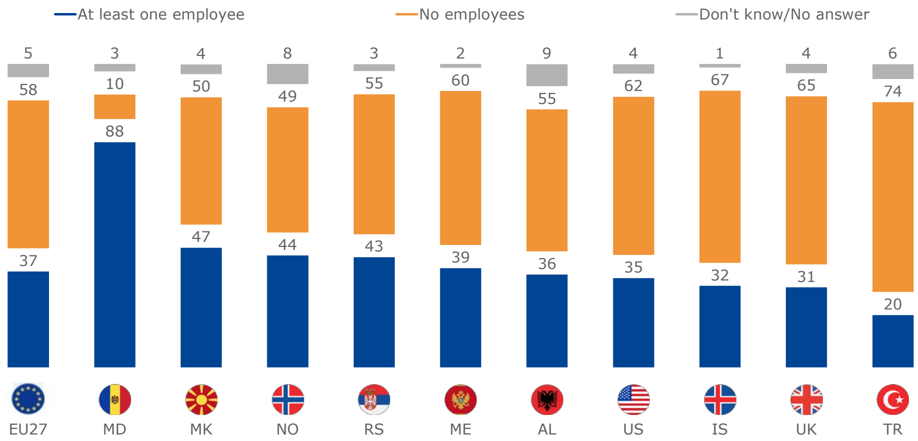
DX5 In your company, how many of your full-time employees, including yourself, work in green jobs some or all of the time?
% "At least one employee", by country (2021 vs 2017)



Base: all SMEs, EU27 (n=13 343 in 2021; 11 690 in 2017)
▼▲ Evolution 2021-2017 (comparison with Flash Eurobarometer 456, Sept. 2017)

SMEs in the US are about as likely as SMEs in the EU to have at least one employee working in a green job (35% and 37%, respectively). Among the remaining **non-EU countries** surveyed, this proportion varies between 20% in Turkey and 47% in North Macedonia, and then further increases to 88% in Moldova (although due to smaller number of interviews in this country, this figure should be interpreted with caution).

DX5 In your company, how many of your full-time employees, including yourself, work in green jobs some or all of the time? (% by country, non-EU countries)



Caution should be exercised when interpreting the results of Albania, Moldova and Montenegro, due to the smaller number of interviews having been conducted (between 93 and 107 per country).

Base: all SMEs, non-EU countries (n=3 200)

Section 6. Analysis in terms of industrial ecosystems

In 2020, the European Commission presented its new industrial strategy.[9] The strategy is supported by a new focus on industrial ecosystems, taking into account all players within a value chain. So far, 14 industrial ecosystems have been identified based on their economic and technological relevance, and for their expected contribution to the decarbonisation, digitalisation and resilience of the EU economy. These 14 industrial ecosystems are:

- Aerospace and Defence (n=79)
- Agri-food (n=369)
- Construction (n=3 619)
- Cultural and Creative Industries (n=473)
- Digital (n=729)
- Electronics (n=219)
- Energy Intensive Industries (n=351)
- Energy-Renewables (n=485)
- Health (n=142)
- Mobility-Transport-Automotive (n=1 796)
- Proximity, Social Economy and Civil Security (n=760)
- Retail (n=3 249)
- Textile (n=277)
- Tourism (n=1 213)

In this survey, respondents were presented with a list of industrial ecosystems and were asked which one best describes their SMEs; the values in brackets in the list of industrial ecosystems presented above are the number of SMEs surveyed selecting each of the industrial ecosystems. Respondents were only presented with the industrial ecosystems that match with their sector of activity (NACE 1-digit sectors, from B to M).

For each industrial ecosystem, the European Commission has identified core activities, i.e. those that more than the others characterise each industrial ecosystem, and these activities have been mapped against the NACE classification. It is, however, important to add that SMEs in this survey are not assigned to a specific industrial ecosystem based on the detailed 2-digit NACE sector of the SME, but on **their own assessment of which description of the different industrial ecosystems best**

[9] Communication from the European Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions. **A New Industrial Strategy for Europe**, COM/2020/102 final https://ec.europa.eu/info/sites/default/files/communication-eu-industrial-strategy-march-2020_en.pdf

fits with the activities of their SME (question wording: 'which of the following best describes your SME?'). Moreover, a considerable share of SMEs found it difficult to select one of the industrial ecosystems and said they 'did not know' or that none of the descriptions were applicable (n=2 245).

6.1. Going green and resource efficient

Across all industrial ecosystems, **a large majority of SMEs are taking measures to be more resource efficient**. The proportion of SMEs replying that they do **not** take any measures is higher in the industrial ecosystem 'Aerospace and defence', but there are only 79 SMEs interviewed in this industrial ecosystem and caution should be exercised when interpreting the results of this small industrial ecosystem. Among the industrial ecosystems with a larger sample size, the proportion of SMEs not taking measures ranges from 4% in 'Health' and 'Textile' to 13% in 'Cultural and creative industries' and 'Proximity, social economy and civil security'.

Across most industrial ecosystems, the **most common resource efficiency actions undertaken** are minimising waste, saving energy and saving materials. There are, however, also some important **differences across the industrial ecosystems in terms of uptake of certain measures**. For example, 62% of SMEs in 'Electronics' reply that they are recycling, by reusing material or waste within the company; this figure is 30% in the industrial ecosystem of 'Digital'. Similarly, while 50% of SMEs in 'Textile' answer that they are designing products that are easier to maintain, repair or reuse, this proportion is 19% in the industrial ecosystem of 'Proximity, social economy and civil security'.

Q1 What actions is your company undertaking to be more resource efficient?
(% by industrial ecosystem, EU27)

	Minimising waste	Saving energy	Saving materials	Recycling, by reusing material or waste within the company	Saving water	Switching to greener suppliers of materials	Designing products that are easier to maintain, repair or reuse	Selling your residues and waste to another company	Using predominantly renewable energy	Other	None	Don't know/No answer
Aerospace and defence*	49	48	34	21	19	8	21	19	18	0	32	0
Agri-food	72	60	58	48	58	39	41	44	27	0	8	0
Construction	67	59	61	49	42	32	29	29	21	2	8	1
Cultural and creative industries	63	58	48	52	41	30	33	21	25	3	13	0
Digital	57	66	51	30	43	35	27	16	23	4	9	1
Electronics	68	63	69	62	39	14	40	38	10	1	7	0
Energy intensive industries	46	44	43	48	33	18	26	19	9	6	11	10
Energy - renewables	63	64	49	38	49	34	27	38	37	0	10	3
Health	92	61	82	64	50	31	42	28	9	1	4	0
Mobility - Transport - Automotive	58	57	52	42	44	27	26	31	19	1	11	1
Proximity, social economy and civil security	61	56	52	48	42	31	19	13	25	3	13	1
Retail	64	62	56	48	48	35	23	23	15	1	7	1
Textile	72	58	65	51	38	47	50	21	12	1	4	0
Tourism	71	71	63	49	63	43	30	27	22	1	5	2

Note: * results based on less than 100 interviews
Base: all SMEs that selected an industrial ecosystem (n=13 761), EU27

Respondents in this survey were next asked which **additional resource efficiency actions their SME is planning to implement over the next two years**. The proportion of SMEs that will not undertake (additional) resource efficiency actions in the next two years is the lowest in the industrial ecosystem of 'Health' (7%), followed by 'Electronics' (11%). In the industrial ecosystem of 'Energy – renewables', 37% of SMEs reply that they will not undertake any additional resource efficiency actions in the next two years; it was noted in the previous section, however, that a vast majority of these SMEs are already undertaking resource efficiency actions. The proportion of SMEs that will not undertake additional resource efficiency measures is also higher in 'Cultural and creative industries' (28%); in this industrial ecosystem, however, respondents are among the most likely to state that their SME is not currently undertaking any actions (see previous page).

Q2 Over the next two years, what are the additional resource efficiency actions that your company is planning to implement? (% by industrial ecosystem, EU27)

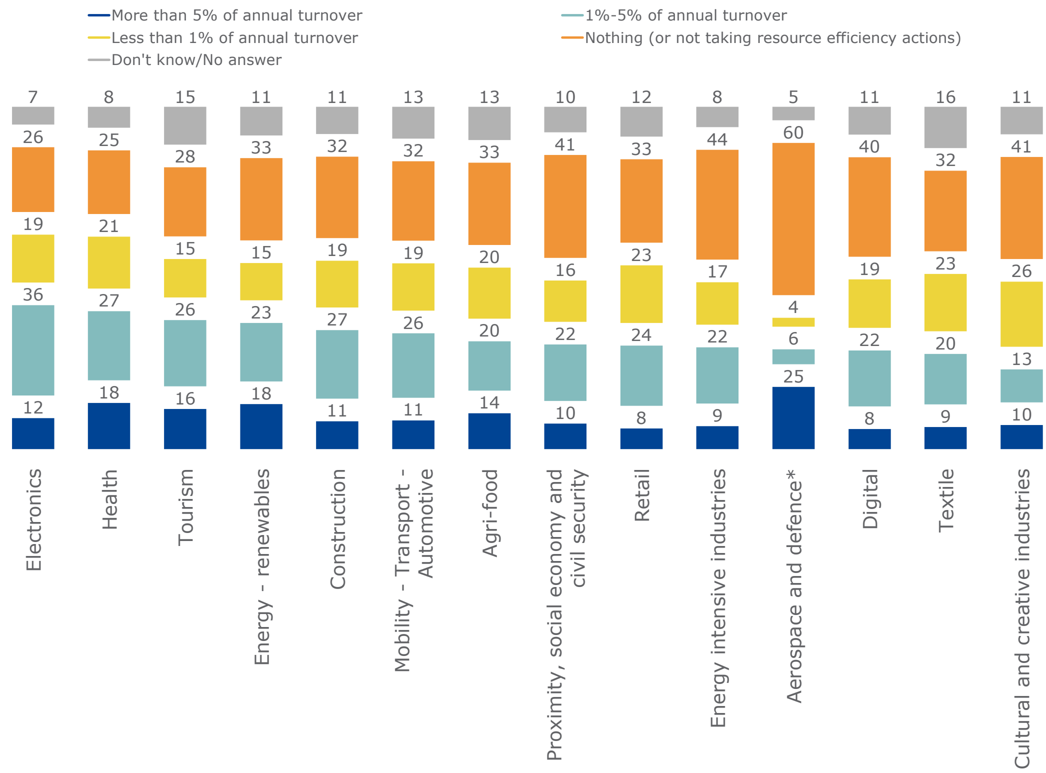
	Minimise waste	Save energy	Save materials	Recycle, by reusing material or waste within the company	Save water	Switch to greener suppliers of materials	Designing products that are easier to maintain, repair or reuse	Sell your residues and waste to another company	Use predominantly renewable energy	Other	None	Don't know/No answer
Aerospace and defence*	35	49	35	18	43	7	19	19	44	0	33	0
Agri-food	51	57	52	37	53	25	27	32	36	0	17	1
Construction	51	50	49	42	38	30	31	27	31	2	20	3
Cultural and creative industries	33	47	43	36	30	30	23	15	30	0	28	2
Digital	48	53	42	32	38	30	28	17	30	1	21	2
Electronics	59	65	61	51	38	42	35	46	32	1	11	0
Energy intensive industries	53	36	44	36	34	19	24	21	18	0	20	0
Energy - renewables	36	34	40	33	25	29	19	28	33	4	37	3
Health	80	66	81	64	69	39	38	23	29	0	7	0
Mobility - Transport - Automotive	47	50	46	36	40	30	27	32	30	3	22	2
Proximity, social economy and civil security	48	59	46	34	45	29	25	16	32	6	19	1
Retail	53	55	46	42	42	36	29	22	28	2	19	3
Textile	53	56	50	47	32	47	45	24	26	0	16	1
Tourism	60	61	52	40	53	41	31	27	34	1	13	6

Note: * results based on less than 100 interviews
Base: all SMEs that selected an industrial ecosystem (n=13 761), EU27

Between 8% of SMEs in the industrial ecosystems of 'Digital' and 'Retail' and 18% of those in 'Health' and 'Energy – renewables' reply that they have invested, on average, more than 5% of their annual turnover over the past two years to become more resource efficient. The proportion having invested between 1% and 5% of their annual turnover is the lowest in 'Cultural and creative industries' (13%), but it is the highest in 'Electronics' (36%).

The chart below shows that the proportion of SMEs having **invested 1% or more of their turnover in the past two years** to become more resource efficient is the highest in the industrial ecosystems of 'Energy – renewables', 'Tourism', 'Health' and 'Electronics', but is significantly lower in 'Cultural and creative industries'.

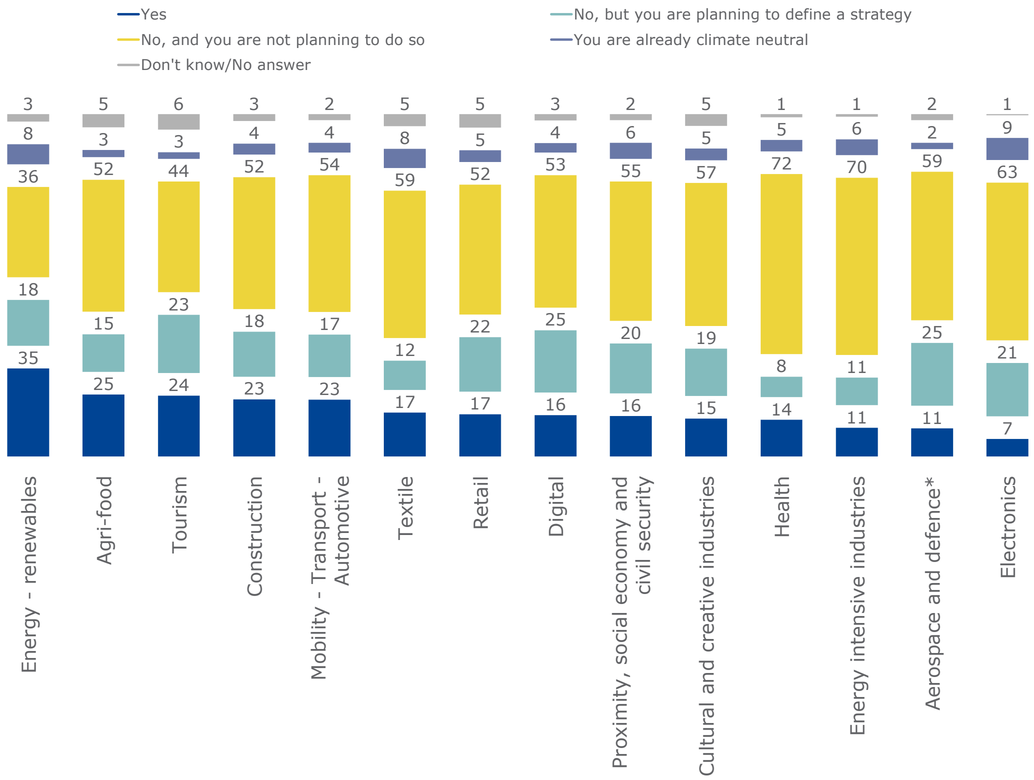
Q4 Over the past two years, how much have you invested on average per year to be more resource efficient? (% by industrial ecosystem, EU27)



Note: * results based on less than 100 interviews
Base: all SMEs that selected an industrial ecosystem (n=13 761), EU27

More than a third (35%) of SMEs in the industrial ecosystem of 'Energy – renewables' reply that they have **a concrete strategy in place to reduce their carbon footprint** and become climate neutral or negative. This figure is also higher in 'Agri-food' (25%), 'Tourism' (24%), 'Construction' and 'Mobility – Transport – Automotive' (both 23%), but it is much lower in 'Energy intensive industries' (11%) and 'Electronics' (7%). In the latter industrial ecosystem, 21% of SMEs reply that they do not yet have a carbon reduction strategy in place, but that they are **planning to define one**; among SMEs in 'Energy intensive industries', this applies to just 11% of SMEs.

Q14 Does your company have a concrete strategy in place to reduce your carbon footprint and become climate neutral or negative? (% by industrial ecosystem, EU27)



Note: * results based on less than 100 interviews
Base: all SMEs that selected an industrial ecosystem (n=13 761), EU27

6.2. Difficulties setting up resource efficiency actions

SMEs undertaking resource efficiency actions were asked if they **encountered any difficulties setting up these actions**. In six of the industrial ecosystems, the largest share of these SMEs refer to **complexity of administrative or legal procedures** – for example, this difficulty is selected by 47% of SMEs in 'Electronics' and 46% in 'Energy – renewables'. In other industrial ecosystems, respondents are more likely to mention **the cost of environmental actions** – for example, this type of costs is mentioned as a difficulty by 44% of SMEs in 'Agri-food'. In the industrial ecosystem of 'Health', 60% of respondents say they found it difficult to choose the right resource efficiency actions for their SME.

In 'Energy intensive industries', 'Cultural and creative industries' and 'Retail', the largest (or joint largest) share of SMEs reply that they did **not encounter any of the difficulties** listed in the survey (between 26% and 35%). It should be added, however, that SMEs in the first two of these industrial ecosystems are overall somewhat less likely than their counterparts to be taking resource efficiency actions.

Q7 Did your company encounter any of the following difficulties when trying to set up resource efficiency actions? (% by industrial ecosystem, EU27)

	Complexity of administrative or legal procedures	Cost of environmental actions	Lack of supply of required materials, parts, products or services	Lack of specific environmental expertise	Difficulty to adapt environmental legislation to your company	Difficulty in choosing the right resource efficiency actions for your company	Lack of demand for resource efficient products or services	Complexity associated with environmental labelling and certification	Technical requirements of the legislation not being up to date	Other	None	Don't know/No answer
EU27 (SMEs)	34	27	24	23	21	21	20	19	18	1	32	3
Aerospace and defence*	13	44	29	5	38	8	18	20	25	0	27	0
Agri-food	41	44	33	21	31	22	31	26	28	1	22	2
Construction	36	25	27	24	23	18	19	22	21	2	31	2
Cultural and creative industries	27	22	25	19	13	18	21	18	15	2	32	1
Digital	31	18	26	26	22	22	21	16	19	1	30	1
Electronics	47	23	39	20	22	26	28	18	20	0	25	0
Energy intensive industries	20	26	26	24	18	11	18	18	15	6	26	1
Energy - renewables	46	29	22	19	21	24	12	12	23	1	26	2
Health	56	49	41	43	47	60	48	45	32	0	21	0
Mobility - Transport - Automotive	34	35	26	24	20	25	20	20	17	0	31	1
Proximity, social economy and civil security	34	31	24	27	25	20	19	21	18	1	33	1
Retail	32	24	21	20	17	20	21	19	18	1	35	4
Textile	22	23	34	23	24	15	26	24	22	0	31	1
Tourism	38	35	23	26	28	24	23	23	22	2	22	6

Note: * results based on less than 100 interviews
Base: all SMEs that selected an industrial ecosystem and
that are undertaking resource efficiency actions (n=12 477), EU27

6.3. What would help SMEs most to go green and resource efficient?

In line with the EU average results, in most industrial ecosystems, the largest share of SMEs think that **grants or subsidies** would help their company the most to be more resource efficient. For example, this view is shared by 46% of SMEs in 'Tourism, 41% in 'Mobility - Transport – Automotive' and 40% in 'Digital'.

In the industrial ecosystem of 'Cultural and creative industries', the largest share of SMEs reply that **consultancy on how to improve resource efficiency in their company** would help their company the most to be more resource efficient (37%). In the industrial ecosystem of 'Health', the largest share of SMEs refer to **a tool to self-assess how resource efficient their company is with respect to other companies** (49%).

Across most industrial ecosystems, less than one in five SMEs think that **none of the measures and tools listed in the survey would help** them to be more resource efficient; in 'Energy intensive industries', however, 33% of SMEs reply that none of the measures and tools listed in the survey would help them.

Q8 Which of the following would help your company the most to be more resource efficient? (% by business characteristics, EU27)

	Grants or subsidies	Better cooperation between companies across sectors so that new processes to re-use waste and by-products can be developed	Consultancy on how to improve resource efficiency in your company	Demonstration of new technologies or processes to improve resource efficiency	Advice on funding possibilities and financial planning for resource efficiency investments	Clearer rules on the use of secondary raw materials	Database with case studies that show the benefits of resource efficiency for companies	A tool to self-assess how resource efficient your company is with respect to other companies	Other	None	Don't know/No answer
EU27 (SMEs)	36	26	25	22	20	19	16	15	1	17	4
Company size											
Aerospace and defence*	47	17	1	27	4	16	24	13	0	35	0
Agri-food	39	22	21	30	38	26	13	16	1	12	1
Construction	36	30	24	24	18	23	16	17	1	13	3
Cultural and creative industries	27	25	37	24	19	15	15	14	0	23	1
Digital	40	17	25	25	23	16	19	19	1	16	3
Electronics	39	29	26	28	12	27	21	24	4	2	4
Energy intensive industries	32	17	19	8	16	21	9	4	1	33	8
Energy - renewables	37	25	27	30	22	25	9	15	1	12	2
Health	47	22	28	23	8	20	32	49	0	4	3
Mobility - Transport - Automotive	41	21	24	19	25	18	13	12	2	15	5
Proximity, social economy and civil security	33	20	26	24	20	20	15	12	3	20	1
Retail	34	30	24	18	21	15	17	13	1	19	3
Textile	36	32	22	26	30	29	13	14	1	13	0
Tourism	46	33	28	17	21	17	18	19	1	11	5

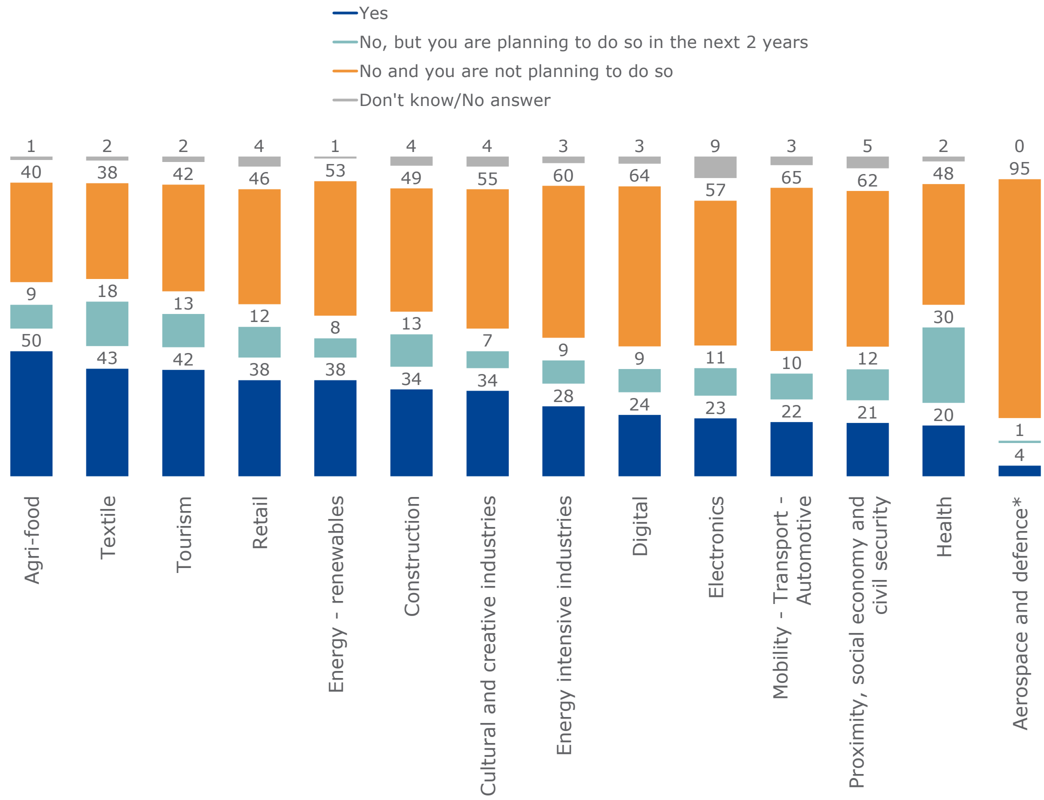
Note: * results based on less than 100 interviews
Base: all SMEs that selected an industrial ecosystem (n=13 761), EU27

6.4. Green markets

Half of SMEs in 'Agri-food' answer that their company **offers green products or services**; this proportion is 43% in the industrial ecosystem 'Textile' and 42% in 'Tourism'. Moreover, in the industrial ecosystem 'Textile', 18% of SMEs reply that they do not offer green products or services but have **plans to introduce these in the next two years**.

The largest shares of SMEs that do **not offer green products or services and have no plans** to do so are observed in the industrial ecosystems of 'Digital' (64%) and 'Mobility – Transport – Automotive' (65%).

Q9 Does your company offer green products or services? (% by industrial ecosystem, EU27)



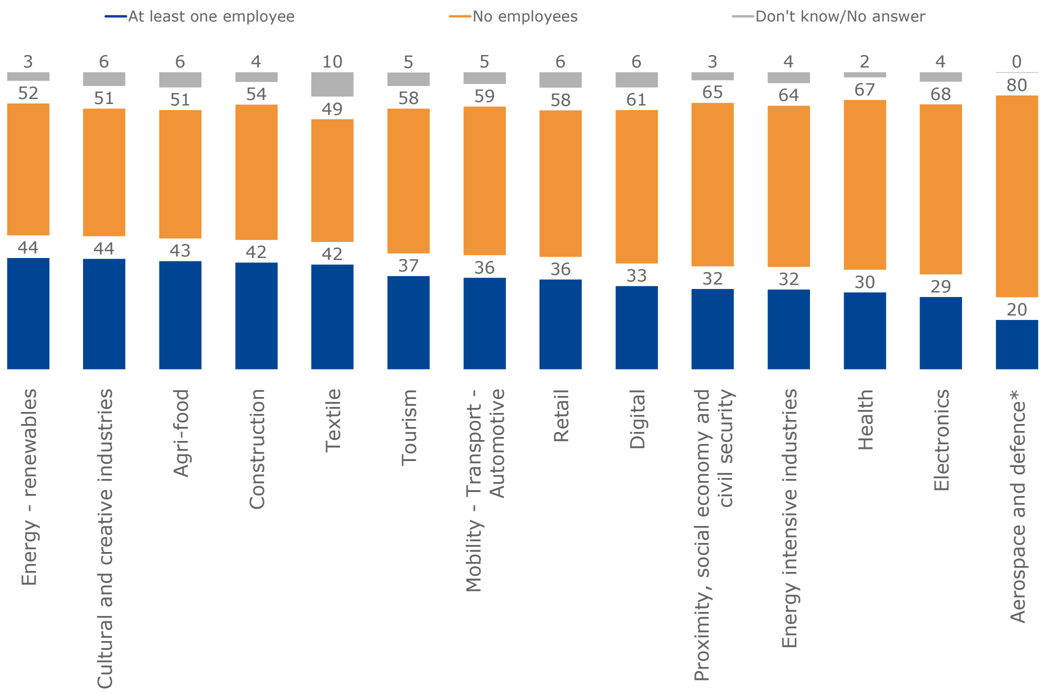
	Yes	No, but you are planning to do so in the next 2 years	No and you are not planning to do so	Don't know/No answer
Agri-food	50	9	40	1
Textile	43	18	38	2
Tourism	42	13	42	2
Retail	38	12	46	4
Energy - renewables	38	8	53	1
Construction	34	13	49	4
Cultural and creative industries	34	7	55	4
Energy intensive industries	28	9	60	3
Digital	24	9	64	3
Electronics	23	11	57	9
Mobility - Transport - Automotive	22	10	65	3
Proximity, social economy and civil security	21	12	62	5
Health	20	30	48	2
Aerospace and defence*	4	1	95	0

Note: * results based on less than 100 interviews
Base: all SMEs that selected an industrial ecosystem (n=13 761), EU27

6.5. Green jobs

There are also differences across the different industrial ecosystems in the proportion of SMEs with **at least one full-time employee working in a green job some or all of the time**. The proportion of SMEs with one or more 'green' employees varies between 29% in 'Electronics' and 44% in both 'Cultural and creative industries' and 'Energy – renewables'.

DX5 In your company, how many of your full-time employees, including yourself, work in green jobs some or all of the time? (% by industrial ecosystem, EU27)



Note: * results based on less than 100 interviews
Base: all SMEs that selected an industrial ecosystem (n=13 761), EU27

Technical specifications

Between 8 November and 10 December 2021, Ipsos European Public Affairs carried out the Flash Eurobarometer 498 at the request of the European Commission, Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs. It is a company survey coordinated by the Directorate-General for Communication, “Media monitoring and Eurobarometer” Unit.

This Flash Eurobarometer survey covers Small and Medium-Sized enterprises in the Manufacturing (NACE category C), Industry (NACE categories B/D/E/F), Retail (NACE category G) and Services (NACE categories H/I/J/K/L/M) in each of the 27 EU Member States and in nine non-EU countries (Albania, North Macedonia, Montenegro, Serbia, Turkey, Iceland, Moldova, Norway and the US). Interviews took place with someone with decision-making responsibilities (managing director, general manager, CEO, financial director), someone leading the commercial activities (commercial manager, sales manager, marketing manager) or a legal officer. All interviews were carried via Computer-Assisted Telephone Interviewing (CATI).

EU Member States

	Number of interviews (SMEs/large)	Fieldwork dates		Universe of SMEs (absolute number)[1]	% of EU27 universe
		Start	End		
EU27	**13 343 / 872**	**8 Nov 2021**	**10 Dec 2021**	**22 036 821**	**100%**
BE	539 / 65	8 Nov 2021	2 Dec 2021	633 095	2.87%
BG	477 / 41	8 Nov 2021	2 Dec 2021	337 094	1.53%
CZ	568 / 33	8 Nov 2021	30 Nov 2021	1 037 720	4.71%
DK	447 / 54	8 Nov 2021	25 Nov 2021	215 575	0.98%
DE	568 / 32	8 Nov 2021	1 Dec 2021	2 421 347	10.99%
EE	495 / 12	8 Nov 2021	23 Nov 2021	77 589	0.35%
IE	484 / 23	8 Nov 2021	19 Nov 2021	254 322	1.15%
EL	585 / 17	9 Nov 2021	29 Nov 2021	707 849	3.21%
ES	560 / 40	8 Nov 2021	1 Dec 2021	2 573 461	11.68%
FR	553 / 62	8 Nov 2021	24 Nov 2021	2 803 787	12.72%
HR	511 / 42	8 Nov 2021	9 Dec 2021	169 516	0.77%
IT	538 / 63	9 Nov 2021	25 Nov 2021	3 527 142	16.01%
CY	247 / 5	8 Nov 2021	25 Nov 2021	56 807	0.26%
LV	498 / 6	8 Nov 2021	30 Nov 2021	104 780	0.48%
LT	477 / 25	8 Nov 2021	23 Nov 2021	211 192	0.96%
LU	243 / 13	8 Nov 2021	19 Nov 2021	34 370	0.16%
HU	499 / 35	8 Nov 2021	9 Dec 2021	609 165	2.76%
MT	243 / 12	8 Nov 2021	17 Nov 2021	30 152	0.14%
NL	549 / 56	9 Nov 2021	8 Dec 2021	1 226 261	5.56%
AT	477 / 37	8 Nov 2021	19 Nov 2021	319 880	1.45%
PL	590 / 19	8 Nov 2021	8 Dec 2021	1 970 670	8.94%
PT	555 / 46	8 Nov 2021	25 Nov 2021	749 670	3.40%
RO	584 / 27	8 Nov 2021	3 Dec 2021	498 866	2.26%
SI	534 / 27	8 Nov 2021	10 Dec 2021	141 176	0.64%
SK	485 / 15	8 Nov 2021	30 Nov 2021	480 344	2.18%
FI	482 / 19	8 Nov 2021	30 Nov 2021	223 066	1.01%
SE	555 / 46	8 Nov 2021	26 Nov 2021	621 925	2.82%

Note (1): Universe calculations based on Eurostat Enterprise Statistics and Business Demography, 2018

Non-EU countries

	Number of interviews (SMEs/large)	Fieldwork dates	
		Start	End
UK	459 / 52	9 Nov 2021	26 Nov 2021
TR	450 / 55	8 Nov 2021	10 Dec 2021
MK	504 / 11	8 Nov 2021	30 Nov 2021
ME	93 / 8	8 Nov 2021	19 Nov 2021
RS	468 / 39	8 Nov 2021	25 Nov 2021
AL	98 / 9	8 Nov 2021	23 Nov 2021
IS	253 / 14	8 Nov 2021	18 Nov 2021
NO	285 / 17	8 Nov 2021	10 Dec 2021
MD	107 / 7	8 Nov 2021	22 Nov 2021
US	483 / 35	8 Nov 2021	10 Dec 2021

Margin of error

Survey results are subject to sampling tolerances. The "margin of error" quantifies uncertainty about (or confidence in) a survey result. As a general rule, the more interviews conducted (sample size), the smaller the margin of error. A sample of 500 will produce a margin of error of not more than 4.4 percentage points. The maximum margin of sampling error when comparing individual country results between surveys is ±8.8 percentage points for countries with a sample size of 500.

Statistical margins due to sampling tolerances
(at the 95% level of confidence)

various sample sizes are in rowsvarious observed results are in columns

	5%	10%	25%	50%	75%	90%	95%
n=50	±6.0	±8.3	±12.0	±13.9	±12.0	±8.3	±6.0
n=100	±4.3	±5.9	±8.5	±9.8	±8.5	±5.9	±4.3
n=200	±3.0	±4.2	±6.0	±6.9	±6.0	±4.2	±3.0
n=500	±1.9	±2.6	±3.8	±4.4	±3.8	±2.6	±1.9
n=1000	±1.4	±1.9	±2.7	±3.1	±2.7	±1.9	±1.4
n=1500	±1.1	±1.5	±2.2	±2.5	±2.2	±1.5	±1.1
n=2000	±1.0	±1.3	±1.9	±2.2	±1.9	±1.3	±1.0

Questionnaire

ASK ALL

SCR9 What is the main activity of your company?

(READ OUT MAIN CATEGORIES FIRST, THEN SUBCATEGORIES, ONE ANSWER ONLY)

Industry	
Mining and Quarrying	1
Manufacturing	2
Electricity, gas, steam and air conditioning supply	3
Water Supply; sewerage, waste management and remediation activities	4
Construction, transport, ICT	
Construction	5
Transportation and Storage	6
Information and Communication	7
Trade, accommodation and food services	
Wholesale and retail trade; repair of motor vehicles and motorcycles	8
Accommodation and food service activities	9
Non-public services	
Financial and insurance activities	10
Real estate activities	11
Professional, scientific and technical activities	12
Administrative and support service activities	13
Arts, entertainment and recreation	14
Other service activities	15
Activities of households as employers; undifferentiated goods and services producing activities of households for own use	16
Activities of extraterritorial organisations and bodies	17
Public services	
Public administration and defence; compulsory social security	18
Education	19
Human health and social work activities	20
Agriculture, Forestry and Fishing	
Agriculture, Forestry and Fishing	21
Don't know/No Answer (DO NOT READ OUT)	998

ASK IF NACE=C, E, G, H, I, J or M

D1b Which of the following categories best describes your company?

(READ OUT, ONE ANSWER ONLY)

Aerospace and defence	1
Agri-food	2
Construction	3
Cultural and creative industries	4
Digital	5
Electronics	6
Energy - renewables	7
Energy intensive industries	8
Health	9
Mobility - Transport - Automotive	10
Proximity (local and short value chains), social economy and civil security	11
Retail	12
Textile	13
Tourism	14
Not applicable (DO NOT READ OUT)	997
Don't know/No Answer (DO NOT READ OUT)	998

ASK ALL

SCR10a How many employees (in full-time equivalents) does your company currently have?

(WRITE DOWN NUMBER OF EMPLOYEES)

NUMERIC FIELD, 5 DIGITS, FOLLOWED BY: (employees) [VALID RANGE 0-750000, INTEGERS ONLY]

Don't know/No answer (DO NOT READ OUT)	999 998

ASK IF D2=998

SCR10b Could you please give me your best estimate using the following categories?

(READ OUT, ONE ANSWER ONLY)

1 to 9 employees	1
10 to 49 employees	2
50 to 249 employees	3
250 to 499 employees	4
500 or more employees	5
None, sole trader	0
Don't know/No Answer (DO NOT READ OUT)	998

ASK ALL

SCR12a In what year was your company established?

(WRITE DOWN YEAR)

NUMERIC FIELD, 4 DIGITS, FOLLOWED BY: (year) [VALID RANGE 1750-2021, INTEGERS ONLY]

Don't know/No answer (DO NOT READ OUT)	9998

ASK ALL

SCR12b Could you please give me your best estimate using the following categories?

(READ OUT, ONE ANSWER ONLY)

Before 1 January 2014	1
Between 1 January 2014 and 31 December 2016	2
Between 1 January 2017 and 1 January 2021	3
After 1 January 2021	4
Don't know/No Answer (DO NOT READ OUT)	998

ASK ALL

SCR13 Over the past two years, has your company's annual turnover increased, decreased or remained unchanged?

(DO NOT READ OUT, ONE ANSWER ONLY)

Increased	1
Decreased	2
Remained unchanged	3
Not applicable (DO NOT READ OUT)	997
Don't know/No Answer (DO NOT READ OUT)	998

ASK ALL

SCR14 What was your company's total turnover in 2020?

ADD, IF NEEDED: If you are not sure, please provide your best estimate.

(READ OUT IF NECESSARY, ONE ANSWER ONLY)

Less than 25,000 euro	1
More than 25,000 to 50,000 euro	2
More than 50,000 to 100,000 euro	3
More than 100,000 to 250,000 euro	4
More than 250,000 to 500,000 euro	5
More than 500,000 to 2 million euro	6
More than 2 to 10 million euro	7
More than 10 to 50 million euro	8
More than 50 million euro	9
Not applicable (DO NOT READ OUT)	997
Don't know/No Answer (DO NOT READ OUT)	998

	ASK ALL	
SCR16	**Does your company sell…?**	
	(READ OUT, ONE ANSWER ONLY)	
	Products	1
	Services	2
	Both products and services	3
	Don't know/No Answer (DO NOT READ OUT)	998

	ASK ALL	
SCR15	**Is your company selling its products or services…?**	
	(READ OUT, MULTIPLE ANSWERS)	
	Directly to consumers	1
	To other companies	2
	To public administration	3
	Don't know/No Answer (DO NOT READ OUT)	998

	ASK ALL
D12	**In which region is your company headquarters located?**
	(READ OUT IF NECESSARY, ONE ANSWER ONLY)

	ASK ALL
Intro_Q1	(READ OUT) I will now ask you a few questions about resource efficiency actions that you company may have undertaken. For the purpose of this survey, resource efficiency means using natural resources in a sustainable and environmentally-friendly manner, and this at different stages, from supply and production to, for example, waste management.

	ASK ALL	
Q1	**What actions is your company undertaking to be more resource efficient?**	
	(READ OUT - MULTIPLE ANSWERS POSSIBLE) (RANDOMISE ITEMS 1 TO 9)	
	Saving water	1
	Saving energy	2
	Using predominantly renewable energy (e.g. including own production through solar panels, etc.)	3
	Saving materials	4
	Switching to greener suppliers of materials	5
	Minimising waste	6
	Selling your residues and waste to another company	7
	Recycling, by reusing material or waste within the company	8
	Designing products that are easier to maintain, repair or reuse	9
	Other (DO NOT READ OUT)	10
	None (DO NOT READ OUT)	11
	Don't know/No answer (DO NOT READ OUT)	12
	FL456 - Q1 (REVISED TREND)	

ASK ALL

Q2 Over the next two years, what are the additional resource efficiency actions that your company is planning to implement?

(READ OUT - MULTIPLE ANSWERS POSSIBLE) (RANDOMISE ITEMS 1 TO 9)

Save water	1
Save energy	2
Use predominantly renewable energy (e.g. including own production through solar panels, etc.)	3
Save materials	4
Switch to greener suppliers of materials	5
Minimise waste	6
Sell your residues and waste to another company	7
Recycle, by reusing material or waste within the company	8
Designing products that are easier to maintain, repair or reuse	9
Other (DO NOT READ OUT)	10
None (DO NOT READ OUT)	11
Don't know/No answer (DO NOT READ OUT)	12

FL456 - Q2 (REVISED TREND)

ASK IF CODE 1 TO 8 IN Q1

Q3 What impact have the undertaken resource efficiency actions had on the production costs over the past two years? The production costs have...

(READ OUT - ONE ANSWER ONLY)

Significantly decreased	1
Slightly decreased	2
Slightly increased	3
Significantly increased	4
Not changed (DO NOT READ OUT)	5
Don't know/No answer (DO NOT READ OUT)	6

FL456 - Q3

ASK IF CODE 1 TO 8 IN Q1

Q4 Over the past two years, how much have you invested on average per year to be more resource efficient?

(READ OUT - ONE ANSWER ONLY)

Nothing	1
Less than 1% of annual turnover	2
1- 5% of annual turnover	3
6-10% of annual turnover	4
11-30% of annual turnover	5
More than 30% of annual turnover	6
Don't know/No answer (DO NOT READ OUT)	7

FL456 - Q4

ASK IF CODE 1 TO 8 IN Q1

Q5 Which type of support does your company rely on in its efforts to be more resource efficient?

(READ OUT - MULTIPLE ANSWERS POSSIBLE) (RANDOMISE ITEMS 1 TO 3)

Its own financial resources	1
Its own technical expertise	2
External support	3
Other (DO NOT READ OUT)	4
Don't know/No answer (DO NOT READ OUT)	5

FL456 - Q5

ASK IF Q5=3

Q6 More precisely, which type of external support is it?

(READ OUT - MULTIPLE ANSWERS POSSIBLE) (RANDOMISE ITEMS 1 TO 7)

Public funding such as grants, guarantees or loans	1
Private funding from a bank, an investment company or venture capital fund	2
Private funding from friends and relatives	3
Advice or other non-financial assistance from public administration	4
Advice or other non-financial assistance from private consulting and audit companies	5
Advice or other non-financial assistance from business associations and clusters	6
Advice or other non-financial assistance from supply chain partners	7
Other (DO NOT READ OUT)	8
Don't know/No answer (DO NOT READ OUT)	9

FL456 - Q6 (REVISED TREND)

ASK IF CODE 1 TO 8 IN Q1

Q7 Did your company encounter any of the following difficulties when trying to set up resource efficiency actions?

(READ OUT - MULTIPLE ANSWERS POSSIBLE) (RANDOMISE ITEMS 1 TO 9)

Complexity of administrative or legal procedures	1
Difficulty to adapt environmental legislation to your company	2
Technical requirements of the legislation not being up to date	3
Difficulty in choosing the right resource efficiency actions for your company	4
Cost of environmental actions	5
Lack of specific environmental expertise	6
Lack of supply of required materials, parts, products or services	7
Lack of demand for resource efficient products or services	8
Complexity associated with environmental labelling and certification	9
Other (DO NOT READ OUT)	10
None (DO NOT READ OUT)	11
Don't know/No answer (DO NOT READ OUT)	12

FL456 - Q7 (REVISED TREND)

ASK ALL

Q8 **Which of the following would help your company the most to be more resource efficient?**

(READ OUT - MAX. 3 ANSWERS POSSIBLE) (RANDOMISE ITEMS 1 TO 8)

A tool to self-assess how resource efficient your company is with respect to other companies	1
Consultancy on how to improve resource efficiency in your company	2
Grants or subsidies	3
Advice on funding possibilities and financial planning for resource efficiency investments	4
Demonstration of new technologies or processes to improve resource efficiency	5
Database with case studies that show the benefits of resource efficiency for companies	6
Better cooperation between companies across sectors so that new processes to re-use waste and by-products can be developed	7
Clearer rules on the use of secondary raw materials	8
Other (DO NOT READ OUT)	9
None (DO NOT READ OUT)	10
Don't know/No answer (DO NOT READ OUT)	11

FL456 - Q8

ASK ALL

Q14 **Does your company have a concrete strategy in place to reduce your carbon footprint and become climate neutral or negative?**

(READ OUT - ONE ANSWER ONLY)

Yes	1
No, but you are planning to define a strategy	2
No, and you are not planning to do so	3
You are already climate neutral (DO NOT READ OUT)	4
Don't know/No answer (DO NOT READ OUT)	5

NEW

ASK IF Q14=1

Q15 **What actions is your company undertaking to be become climate neutral?**

(READ OUT - MULTIPLE ANSWERS POSSIBLE) (RANDOMISE ITEMS 1 TO 4)

Generally reducing carbon emissions of your company	1
Adopting/purchasing new technological solutions to reduce emissions	2
Developing new technological solutions to reduce emissions	3
Offsetting carbon emissions by purchasing carbon credits or funding an equivalent carbon saving elsewhere	4
Other (DO NOT READ OUT)	5
None (DO NOT READ OUT)	6
Don't know/No answer (DO NOT READ OUT)	7

NEW

	ASK ALL	
Intro_ Q9	(READ OUT) Green products and services are those with a predominant function of reducing environmental risk and minimise pollution and resources. For the purpose of this survey, this may also include products with environmental features (e.g. organically produced, eco-labelled, with significant recycled content, or eco-designed...)	
	ASK ALL	
Q9	**Does your company offer green products or services?**	
	(READ OUT - ONE ANSWER ONLY)	
	Yes	1
	No, but you are planning to do so in the next 2 years	2
	No and you are not planning to do so	3
	Don't know/No answer (DO NOT READ OUT)	4
	FL456 - Q9	
	ASK Q9=1	
Q10	**How much did these green products or services represent in your annual turnover of the latest available fiscal year?**	
	(READ OUT - ONE ANSWER ONLY)	
	Up to 5%	1
	6-10%	2
	11-30%	3
	31-50%	4
	51-75%	5
	More than 75%	6
	Don't know/No answer (DO NOT READ OUT)	7
	FL456 - Q10	
	ASK Q9=1	
Q11	**For how long has your company been selling green products or services?**	
	(READ OUT - ONE ANSWER ONLY)	
	Less than one year	1
	Between 1 and 3 years	2
	More than 3 years	3
	Don't know/No answer (DO NOT READ OUT)	4
	FL456 - Q11	

ASK Q9=1

Q12 **In terms of turnover over the past 2 years, what were the main markets (countries/geographical regions) for your green products or services?**

(DO NOT READ OUT - MULTIPLE ANSWERS POSSIBLE)

National market	1
European Union (EU27) + United Kingdom + Iceland + Lichtenstein + Norway + Switzerland	2
Other European countries excluding Russia	3
Russia	4
North America countries except USA	5
USA	6
South America + Central America excluding Brazil	7
Brazil	8
Africa	9
Middle East	10
China + Hong Kong + Macau	11
South Korea	12
Japan	13
Other Asian countries	14
Australia + New Zealand + Oceania	15
Don't know/No answer	16

FL456 - Q12

ASK IF Q9=1

Q13 **What type of support does your company rely on for the production of its green products or services?**

(READ OUT - MULTIPLE ANSWERS POSSIBLE) (RANDOMISE ITEMS 1 TO 3)

Its own financial resources	1
Its own technical expertise	2
External support	3
Other (DO NOT READ OUT)	4
Don't know/No answer (DO NOT READ OUT)	5

FL456 - Q13

ASK Q13=3

DX1 Which type of external support does your company get for the production of its green products or services?

(READ OUT - MULTIPLE ANSWERS POSSIBLE) (RANDOMISE ITEMS 1 TO 7)

Public funding such as grants, guarantees or loans	1
Private funding from a bank, an investment company or venture capital fund	2
Private funding from friends and relatives	3
Advice or other non-financial assistance from public administration	4
Advice or other non-financial assistance from private consulting and audit companies	5
Advice or other non-financial assistance from business associations and clusters	6
Advice or other non-financial assistance from supply chain partners	7
Other (DO NOT READ OUT)	8
Don't know/No answer (DO NOT READ OUT)	9

FL456 - DX1 (REVISED TREND)

ASK IF CODE 1 OR 4 IN DX1

DX2 How satisfied or dissatisfied are you with the level of public support for your green products or services?

(READ OUT - ONE ANSWER ONLY)

Very satisfied	1
Fairly satisfied	2
Fairly dissatisfied	3
Very dissatisfied	4
Don't know/No answer (DO NOT READ OUT)	5

FL456 - DX2

ASK IF Q9=1

DX3 What type of support would help you the most to expand your range of green products or services ?

(READ OUT - MAX. 2 ANSWERS POSSIBLE) (RANDOMISE ITEMS 1 TO 4)

Financial incentives for developing products, services or new production processes	1
Assistance with identifying potential markets or customers	2
Technical support and consultancy for the development of products, services and production processes	3
Consultancy services for marketing or distribution	4
Other (DO NOT READ OUT)	5
None (DO NOT READ OUT)	6
Don't know/No answer (DO NOT READ OUT)	7

FL456 - DX3

ASK IF CODE 2 TO 3 IN Q9

DX4 **What type of support would help you the most to launch your range of green products or services?**

(READ OUT - MAX. 2 ANSWERS POSSIBLE) (RANDOMISE ITEMS 1 TO 4)

Financial incentives for developing products, services or new production processes	1
Assistance with identifying potential markets or customers	2
Technical support and consultancy for the development of products, services and production processes	3
Consultancy services for marketing or distribution	4
Other (DO NOT READ OUT)	5
None (DO NOT READ OUT)	6
Don't know/No answer (DO NOT READ OUT)	7

FL456 - DX4

ASK ALL

INTRO_DX5 (READ OUT) A green job is one that directly deals with information, technologies, or materials that preserves or restores environmental quality. This requires specialised skills, knowledge, training, or experience (e.g. verifying compliance with environmental legislation, monitoring resource efficiency within the company, promoting and selling green products and services).

ASK ALL

DX5 **In your company, how many of your full time employees, including yourself, work in green jobs some or all of the time?**

(WRITE DOWN NUMBER OF EMPLOYEES)

NUMERIC FIELD, 5 DIGITS, FOLLOWED BY: (full-time employees in green jobs) [VALID RANGE 0-750000, INTEGERS ONLY]

None (DO NOT READ OUT)	997
Don't know/No answer (DO NOT READ OUT)	999

Data annex

Q1 What actions is your company undertaking to be more resource efficient?

	Saving water	Saving energy	Using predominantly renewable energy (e.g. including own production through solar panels, etc.)	Saving materials	Switching to greener suppliers of materials*	Minimising waste	Selling your residues and waste to another company	Recycling, by reusing material or waste within the company	Designing products that are easier to maintain, repair or reuse	Other	None	Don't know/No answer
EU27	46▼-1	61▼-2	19▲6	57▲1	33	64=	24▲4	47▲8	26▲1	2=	9▼-2	2▲1
BE	48▲1	70=	35▲15	61▼-1	36	79▲4	28▲3	38▼-2	25=	5▲4	5▼-4	1▲1
BG	21▼-8	37▲1	4=	27▼-4	8	30▲2	14▼-2	19▲2	6▼-4	6▲5	19▼-15	3▲1
CZ	43▲1	56▼-5	10▲3	51▲4	31	70▲6	26▼-3	45▲11	35▲2	1▼-1	12▼-1	0=
DK	22▼-18	45▼-11	13▲3	32▼-20	19	32▼-17	14▼-13	26▼-3	14▼-12	4▲3	16▲1	5▲3
DE	43▲8	69▼-1	31▼-1	54▼-3	34	57▼-3	27▲4	50▲12	25▲1	2▲1	14▲7	1▲1
EE	30▲21	46▲25	8▲4	47▲31	19	42▲33	19▲13	27▲14	18▲13	0▼-3	23▼-30	1▲1
IE	29▼-30	38▼-31	12▼-6	21▼-37	29	50▼-35	8▼-18	52▼-19	17▼-9	1▲1	9▲4	4▲2
EL	38▲5	52=	12▼-1	50▲4	37	43▲6	22▼-4	47▲17	22▲3	1▲1	13▼-13	0=
ES	70▲15	78▲6	18▲11	84▲15	53	82▲17	34▲14	76▲19	36▲4	1=	4▼-1	0=
FR	37▼-30	41▼-30	7▲2	40▼-19	25	48▼-35	21▲3	42=	24▼-9	1=	11▲6	2▲2
HR	40▼-10	51▼-13	6▼-2	47▼-15	24	59▼-5	21▼-6	33▲5	25▲8	0▼-1	11▲1	1▲1
IT	45▲1	63▲6	25▲10	59▲7	32	85▲11	23▲7	43▲6	27▲4	2=	2▼-7	5▲5
CY	37▲9	56▲8	18▲10	44▲14	22	34▲5	10▼-4	43▼-3	10▲2	0▼-4	16▼-6	0▼-2
LV	40▼-4	60▲1	4▲1	54▼-1	27	46▲11	23▲13	22▲8	22▲6	2▲1	11▼-12	0▼-1
LT	46▲11	57▲15	10▲6	63▲30	35	49▲28	27▲12	15▲9	21▲14	3▲1	8▼-24	0▼-2
LU	44▲14	58▲9	17▲2	55▲2	43	69▲12	26▲1	52▲8	34▲7	5▲4	7▼-7	0▼-2
HU	50▲10	68▲10	17▲9	61▲16	29	58▲18	25▲4	35▲16	27▲11	2▼-1	7▼-11	1▲1
MT	49▲19	37▼-37	24▲9	46▲12	39	48▼-14	27▲7	41▼-10	23▲8	2▼-2	9▼-1	0=
NL	36▲4	63▼-1	45▲19	60▼-2	35	70▲5	25▼-1	53▲16	32▲11	2=	7▼-1	1▲1
AT	45▲2	65▼-6	32=	59▲7	29	67▲7	29▲4	47=	23▼-9	1=	6▼-3	0=
PL	45▼-4	57=	9▲5	55▼-5	25	53▼-2	21▲1	32▲8	17=	1▲1	19▲3	0=
PT	38▼-26	47▼-29	9=	34▼-41	14	26▼-29	16▼-8	50▼-17	12▼-30	6▲5	6▲2	6▲6
RO	60▲37	66▲34	9▲4	67▲38	38	69▲38	26▲14	40▲18	31▲25	1=	13▼-23	0▼-1
SI	34▼-2	52▲4	12▼-4	42▼-10	34	57▲7	22▲1	36▲3	17▼-9	4▲3	12▼-10	0▼-1
SK	73▲28	78▲20	8▲3	77▲34	44	82▲38	26▲11	53▲18	34▲20	0▼-1	3▼-10	0▼-3
FI	31▲5	60▲9	26▲12	58▲5	28	61▲6	23▲4	41▲10	30▲7	2▲1	9▼-8	0▼-1
SE	48▲12	75▲17	43▲8	79▲14	51	85▲9	23▼-3	67▲6	43▲11	1=	5▼-2	0▼-1

Flash Eurobarometer 498 - SMEs, green markets and resource efficiency / Fieldwork: 08/11 - 10/12/2021
(%) Base: n=13 343 - All SMEs
▼▲ Evolution 2021-2017 (comparison with Flash Eurobarometer 456, Sept. 2017)
Note: * new item, not included in 2017

Q1 What actions is your company undertaking to be more resource efficient?

	Saving water	Saving energy	Using predominantly renewable energy (e.g. including own production through solar panels, etc.)	Saving materials	Switching to greener suppliers of materials*	Minimising waste	Selling your residues and waste to another company	Recycling, by reusing material or waste within the company	Designing products that are easier to maintain, repair or reuse	Other	None	Don't know/No answer
EU27	46▼-1	61▼-2	19▲6	57▲1	33	64=	24▲4	47▲8	26▲1	2=	9▼-2	2▲1
UK	46▼-10	63▼-4	18▲2	54▼-8	47	75▼-7	17▼-12	74▲4	26=	1▼-1	5=	0▼-1
TR	65▲8	65▲4	11▲5	74▲9	52	73▲8	24▼-2	56▲18	42▲11	0▼-1	7▼-4	0=
MK	8▼-6	22▲1	8▲3	11▼-15	8	16▼-4	25▲15	11▼-2	8▲5	2▲1	31▼-16	0=
ME	31▼-6	41▼-5	6▲1	33▲2	25	43▲10	20▲1	21▲11	17▲4	2=	15▼-2	4▲2
RS	28▲4	44▲6	7▼-1	38▲6	19	44▲8	28▲3	26▼-1	17▲7	1▼-1	16▼-11	0▼-1
AL	8▼-21	23▼-12	4=	8▼-12	6	10▼-7	12▲9	18▲9	9▼-5	3▼-3	49▲31	0▼-7
IS	22▼-3	50▲2	28▲10	59▼-8	22	64▼-4	28▲1	54▲9	21▼-6	1▼-1	10▲7	0▼-8
NO	29▲22	67▲41	39▲23	65▲37	60	87▲44	31▲21	69▲41	41▲20	1▼-3	2▼-28	1▼-6
MD	52▲28	54▲25	7▼-3	47▲17	23	58▲51	13▲8	21▲11	18▲5	0▼-8	19▼-5	0▼-6
US	37▼-14	51▼-20	17▼-2	47▼-12	32	60▼-16	24▼-7	61▼-5	22▼-21	1▲1	16▲7	2▼-1

Flash Eurobarometer 498 - SMEs, green markets and resource efficiency / Fieldwork: 08/11 - 10/12/2021
(%) Base: n=3 200 - All SMEs
▼▲ Evolution 2021-2017 (comparison with Flash Eurobarometer 456, Sept. 2017)
Note: * new item, not included in 2017

Caution should be exercised when interpreting the results of Albania, Moldova and Montenegro, due to the smaller number of interviews having been conducted in these countries.

Q2 Over the next two years, what are the additional resource efficiency actions that your company is planning to implement ?

	Save water	Save energy	Use predominantly renewable energy (e.g. including own production through solar panels, etc.)	Save materials	Switch to greener suppliers of materials*	Minimise waste	Sell your residues and waste to another company	Recycle, by reusing material or waste within the company	Designing products that are easier to maintain, repair or reuse	Other	None	Don't know/No answer
EU27	41▼-3	53▼-5	30▲9	48▼-2	32	50▼-5	24▲3	39▲3	27▲3	2▲1	20▲1	3▲1
BE	48▲10	59▲4	50▲21	50▲2	44	60▲2	34▲11	39▲10	31▲9	4▲3	18▼-5	1▼-1
BG	17▼-10	28▼-5	9▲3	27=	12	24=	10▼-4	13▼-3	5▼-6	1▼-3	29▼-10	4▲1
CZ	41▲4	56▲6	26▲13	50▲5	32	62▲12	28▲6	42▲9	35▲1	3▲1	19▼-11	1▲1
DK	9▼-8	24▼-7	11▲1	14▼-10	11	15▼-12	9▼-6	14▲1	10▼-2	6▲5	45▼-5	5=
DE	26▼-8	46▼-19	30▼-4	34▼-15	23	32▼-18	18▼-2	29▼-3	19▼-4	5▲4	34▲16	3▲2
EE	23▲14	38▲17	13▲8	35▲20	19	31▲24	18▲12	23▲11	18▲14	1▼-2	36▼-14	1=
IE	10▼-55	24▼-48	14▼-17	23▼-36	19	13▼-65	9▼-18	21▼-48	13▼-18	5▲4	9▼-1	7▲5
EL	40▲12	62▲15	29▲2	48▲13	44	47▲15	22▼-4	44▲16	27▲6	0▼-1	13▼-19	0▼-3
ES	73▲8	86▲6	45▲30	86▲17	66	83▲15	45▲18	78▲14	43▲8	2▲1	4▼-3	0=
FR	38▼-28	42▼-31	16▲3	37▼-25	26	48▼-30	19▼-6	36▼-5	26▼-8	1▼-1	13▲2	4▲4
HR	38▼-10	49▼-13	28▲9	41▼-18	25	50▼-4	21▼-1	34▲5	25▲5	2▲1	16=	1▼-1
IT	42▼-2	51=	33▲5	49▼-2	20	44▼-20	15▲1	34▼-3	30▲9	1▲1	28▲13	3=
CY	30▲25	49▲36	38▲30	37▲31	31	31▲22	18▲14	33▲22	14▲11	0▼-5	21▼-41	0▼-6
LV	43▼-3	59▲2	21▲12	55▲3	30	46▲7	29▲15	22▲6	27▲8	2=	13▼-13	1▼-1
LT	53▲17	61▲16	27▲21	60▲29	37	52▲29	29▲12	19▲12	25▲18	1▼-2	14▼-16	0▼-3
LU	23▼-4	32▼-5	18▲3	20▼-9	19	28▼-6	17▲8	24▲4	22▲8	10▲5	22▼-12	2▼-1
HU	42▲6	59▲10	35▲16	47▲5	32	48▲8	21▲3	27▲10	28▲13	4▲4	16▼-7	2▲1
MT	11▲1	21▲7	28▲4	14▲5	21	17▲1	8▲1	17▲4	8▲3	14▲6	28▼-14	9▼-3
NL	26▼-1	44▼-13	40▲3	37▼-6	26	43▼-4	22▲5	33▲5	25▲2	1▼-3	31▲9	5▲5
AT	31▼-3	53▼-6	29▼-10	43▲4	13	50▼-2	26▲7	39▲4	22▼-3	1=	20▼-1	12▲10
PL	43▼-9	51▼-8	20▲4	47▼-11	25	49▼-4	22▼-3	30=	19▼-2	1▼-1	25▲7	3▲2
PT	9▼-14	19▼-14	22▲7	10▼-15	16	27▲8	9▼-1	14▼-12	10▼-7	6▲4	13▼-31	11▲7
RO	67▲40	76▲38	43▲32	72▲43	65	73▲38	47▲34	56▲31	45▲29	1▼-1	13▼-16	1▼-2
SI	29▲19	44▲30	25▲16	33▲22	35	46▲36	20▲12	28▲21	14▲6	4=	24▼-38	2=
SK	74▲34	77▲22	32▲20	73▲36	49	78▲37	35▲21	54▲29	37▲22	0▼-1	8▼-10	1▼-7
FI	21▼-2	42▲3	22▲4	34▼-1	21	37▲2	20▲7	29▲9	21▲5	3▼-2	35▼-6	2=
SE	43▲13	68▲22	52▲19	61▲15	46	70▲21	23=	55▲12	43▲16	1▼-8	11▼-17	3▲1

Flash Eurobarometer 498 - SMEs, green markets and resource efficiency / Fieldwork: 08/11 - 10/12/2021
(%) Base: n=13 343 - All SMEs
▼▲ Evolution 2021-2017 (comparison with Flash Eurobarometer 456, Sept. 2017)
Note: * new item, not included in 2017

Q2 Over the next two years, what are the additional resource efficiency actions that your company is planning to implement ?

	Save water	Save energy	Use predominantly renewable energy (e.g. including own production through solar panels, etc.)	Save materials	Switch to greener suppliers of materials*	Minimise waste	Sell your residues and waste to another company	Recycle, by reusing material or waste within the company	Designing products that are easier to maintain, repair or reuse	Other	None	Don't know/No answer
EU27	41▼-3	53▼-5	30▲9	48▼-2	32	50▼-5	24▲3	39▲3	27▲3	2▲1	20▲1	3▲1
UK	41▼-14	62▼-6	34▲4	50▼-8	49	66▼-8	22▼-8	59▼-5	26▼-1	1▲1	15▲2	3=
TR	65▲3	65▼-6	27=	71▲3	59	69▲5	32▼-8	58▲10	47▲4	0▼-1	9▼-4	3▲3
MK	8▼-8	22▼-7	19▲14	8▼-17	5	12▼-6	12=	8▼-8	7▲1	5▲4	31▼-14	6▲3
ME	44▲32	51▲32	34▲16	38▲22	24	38▲21	19▲9	14▲3	21▲13	0=	24=	0▼-9
RS	27▲17	43▲17	23▲8	31▲19	22	34▲22	25▲16	28▲16	16▲11	1▼-3	20▼-18	3▼-6
AL	8▼-10	17▲1	12▲8	14▼-3	1	14▼-13	10▲3	5▼-11	7▼-8	0▼-5	59▲37	4▼-8
IS	10▼-18	28▼-23	22▼-4	25▼-36	19	27▼-36	15▼-15	30▼-16	13▼-14	3=	37▲35	1▼-16
NO	35▲29	51▲26	38▲24	46▲28	53	58▲34	31▲24	56▲35	42▲26	11▲7	13▼-33	4▼-5
MD	51▲25	47▲23	32▲13	46▲18	37	45▲28	21▲14	23▲4	20▲3	1▼-5	11▼-7	5▼-8
US	38▼-20	47▼-22	22▼-12	43▼-23	29	51▼-23	25▼-14	51▼-9	28▼-21	6▲6	25▲13	4▼-1

Flash Eurobarometer 498 - SMEs, green markets and resource efficiency / Fieldwork: 08/11 - 10/12/2021
(%) Base: n=3 200 - All SMEs
▼▲ Evolution 2021-2017 (comparison with Flash Eurobarometer 456, Sept. 2017)
Note: * new item, not included in 2017

Caution should be exercised when interpreting the results of Albania, Moldova and Montenegro, due to the smaller number of interviews having been conducted in these countries.

Q3 What impact have the undertaken resource efficiency actions had on the production costs over the past two years? The production costs have…

	Significantly decreased	Slightly decreased	Slightly increased	Significantly increased	Not changed	Don't know/No answer
EU27	4=	27▼-11	21▲8	10▲6	26▼-1	12▼-2
BE	6▲3	27▼-8	19▲6	7=	31▲1	11▼-2
BG	7▲1	34▼-15	16▲1	18▲15	19▲2	6▼-4
CZ	1▼-1	33▼-13	21▲11	6▲5	31▲2	8▼-4
DK	6=	16▼-11	18▲12	4▲2	46▼-2	12▼-1
DE	2▼-2	24▼-13	22▲15	16▲13	27▼-5	10▼-7
EE	4▼-3	28▼-8	10▲2	15▲12	34▼-9	9▲5
IE	7▲5	20▼-13	30▲9	14▲10	17▼-6	13▼-5
EL	4▼-5	37▼-22	22▲16	6▲3	26▲14	5▼-5
ES	6▼-1	24▼-19	25▲9	13▲7	22▲1	10▲3
FR	5=	21▼-10	28▲12	10▲4	24▼-5	12▼-1
HR	6▲3	41▼-4	13▲8	11▲10	21▼-12	8▼-5
IT	1=	32▼-10	17▲5	6▲3	31▲3	13▼-1
CY	3▼-8	31▼-7	21▲12	7▲5	37▲1	1▼-3
LV	2▼-2	28▼-15	19▲6	20▲12	24▲1	8▼-2
LT	1▼-2	42▼-8	8▼-3	2=	28▲4	19▲9
LU	5▲1	23▼-5	21▲4	7▲7	23▼-12	20▲5
HU	3▲2	32▼-17	17▲7	14▲12	28▲3	5▼-7
MT	3▼-4	29▼-10	20▼-2	8▲4	23▲4	18▲9
NL	4▲1	22▼-5	16▲5	8▲4	28▼-4	22▼-1
AT	5▲1	34▼-10	19▲12	5▲3	26▼-7	11▲2
PL	3▲1	26▼-12	16▼-5	16▲11	22▲5	18=
PT	11▲3	32▼-1	18▲3	8▲5	22▼-10	9=
RO	6▼-5	35▼-6	16▲6	13▲8	17▼-12	14▲9
SI	2▲1	28▼-28	21▲15	6▲5	34▲9	9▼-2
SK	3▲1	24▼-11	22▲10	12▲10	26▲1	12▼-12
FI	3▼-4	35▼-14	16▲7	5▲4	37▲6	5=
SE	2▲1	30▼-3	22▲12	6▲4	27▼-7	14▼-6

Flash Eurobarometer 498 - SMEs, green markets and resource efficiency / Fieldwork: 08/11 - 10/12/2021
(%) Base: n=12 107 - SMEs undertaking resource efficiency actions
▼▲ Evolution 2021-2017 (comparison with Flash Eurobarometer 456, Sept. 2017)

Q3 What impact have the undertaken resource efficiency actions had on the production costs over the past two years? The production costs have…

	Significantly decreased	Slightly decreased	Slightly increased	Significantly increased	Not changed	Don't know/No answer
EU27	4=	27▼-11	21▲8	10▲6	26▼-1	12▼-2
UK	4=	17▼-1	26▲4	14▲9	28▼-2	11▼-11
TR	8▼-5	33▲1	14▼-2	22▲6	12▲4	12▼-4
MK	9▲6	34▼-19	13▼-11	18▲13	22▲11	3▲1
ME	14▼-4	50▲8	13▼-5	6▲1	9▼-5	8▲5
RS	7▼-2	43▼-2	18▲15	11▲9	15▼-14	5▼-5
AL	9▲2	24▼-28	15▲13	18▲18	20▼-10	14▲6
IS	6▲4	13▼-11	13=	13▲13	53▲17	3▼-22
NO	4=	19▼-24	24▲13	7▲1	29▼-1	17▲11
MD	2▼-6	29▼-4	20▼-6	22▲15	23▲17	5▼-16
US	3▼-2	20=	29▼-3	21▲18	19▼-7	8▼-7

Flash Eurobarometer 498 - SMEs, green markets and resource efficiency / Fieldwork: 08/11 - 10/12/2021
(%) Base: n=2 824 - SMEs undertaking resource efficiency actions
▼▲ Evolution 2021-2017 (comparison with Flash Eurobarometer 456, Sept. 2017)
Note: * new item, not included in 2017

Caution should be exercised when interpreting the results of Albania, Moldova and Montenegro, due to the smaller number of interviews having been conducted in these countries.

Q4 Over the past two years, how much have you invested on average per year to be more resource efficient?

	Nothing	Less than 1% of annual turnover	1- 5% of annual turnover	6- 10% of annual turnover	11- 30% of annual turnover	More than 30% of annual turnover	Don't know/No answer
EU27	25▼-6	22▼-3	27▲2	8=	3▲1	2▲1	14▲4
BE	24▼-9	18▼-6	36▲9	8▲3	4▲2	1▲1	9=
BG	26▲4	19▼-12	22▲3	13▲2	5▼-1	2▲1	13▲3
CZ	35▲3	23▼-10	29▲11	5▲2	3▲2	1▼-1	5▼-6
DK	23▼-7	12▼-13	20▼-9	6=	3=	4▲2	33▲26
DE	21▲1	25▼-2	29▼-4	9▲3	2=	1▲1	13▲1
EE	35▲6	19▼-5	23=	9▲3	5▲3	1▼-3	6▼-4
IE	9▼-19	15▼-13	33▲8	14▲10	7▲5	3▲2	20▲7
EL	27▲10	22▲3	33▼-8	12▼-1	3▼-2	1=	3▼-3
ES	23▲7	19▼-4	33▼-5	9▲1	4▲1	1▲1	12=
FR	31▼-17	18▼-5	19▲2	6▲3	3▲2	1=	23▲14
HR	15▼-15	28▲4	38▲14	8=	2▲1	1▲1	8▼-4
IT	20▼-11	24=	27▲7	5▼-5	2▲1	2▲2	19▲6
CY	32▲6	23▼-1	34▲13	2▼-12	4▲1	1▲1	5▼-8
LV	32▲2	27▼-3	21▼-6	8▲4	4▲2	1▼-1	7▲2
LT	36▼-2	26▼-8	19▲2	12▲7	3▼-1	1▲1	4▲1
LU	27▼-6	25▼-4	27▲1	4=	1=	0=	16▲10
HU	24▼-4	28=	25▼-1	9▲3	4▲2	2▼-1	8▲1
MT	14▼-5	21▼-11	31▲11	2▼-3	2▲2	0▼-2	30▲9
NL	23▼-11	19▼-7	27▲3	7▼-2	4▲3	3▲1	17▲12
AT	15▼-8	23▲1	39▲4	9▲1	3▲1	0▼-1	11▲3
PL	33▼-4	24▲1	23▼-1	6▼-3	4▲2	2▲1	10▲4
PT	16▼-13	13▼-11	30▲2	10=	6▲4	2▲2	23▲15
RO	24▲2	29▼-9	27▲2	10▲5	5▲4	3▼-3	3▼-1
SI	21▼-2	29▲1	30▼-1	10▲1	5▲2	1=	5▼-1
SK	29=	25▲6	25▼-5	10▲5	3▼-1	4▲3	6▼-9
FI	27▼-1	25▼-3	30▲1	5▼-1	5▲2	3▲2	5▼-1
SE	22▼-15	25▲7	28▲1	10▲4	4=	2=	10▲3

Flash Eurobarometer 498 - SMEs, green markets and resource efficiency / Fieldwork: 08/11 - 10/12/2021
(%) Base: n=12 107 - SMEs undertaking resource efficiency actions
▼▲ Evolution 2021-2017 (comparison with Flash Eurobarometer 456, Sept. 2017)

Q4 Over the past two years, how much have you invested on average per year to be more resource efficient?

	Nothing	Less than 1% of annual turnover	1- 5% of annual turnover	6- 10% of annual turnover	11- 30% of annual turnover	More than 30% of annual turnover	Don't know/No answer
EU27	25▼-6	22▼-3	27▲2	8=	3▲1	2▲1	14▲4
UK	33▲1	24▼-4	21=	5▲2	2=	1▲1	13=
TR	29▼-11	20▲6	20▲5	9▼-2	5=	5=	11▲1
MK	24▲10	21▼-13	25▼-11	13▲7	7=	6▲4	4▲4
ME	24▲9	20▲12	30▼-7	10▼-5	4▲3	6▲2	7▼-14
RS	23▼-10	17▼-2	28▲7	16▲10	8▲5	4▲1	5▼-12
AL	21▲13	13▼-30	24▼-17	31▲27	1▲1	1▲1	8▲5
IS	37▲1	25▼-3	24▲11	3▼-1	0▼-4	7▲6	4▼-10
NO	21▼-9	18▼-8	22▲6	15▲6	6▲1	3▼-4	15▲9
MD	28▼-11	11▼-15	26▲10	12▲3	10▲9	0▼-3	14▲6
US	17▼-6	28▲6	32▲2	13▲5	6=	0▼-2	5▼-5

Flash Eurobarometer 498 - SMEs, green markets and resource efficiency / Fieldwork: 08/11 - 10/12/2021
(%) Base: n=2 824 - SMEs undertaking resource efficiency actions
▼▲ Evolution 2021-2017 (comparison with Flash Eurobarometer 456, Sept. 2017)
Note: * new item, not included in 2017

Caution should be exercised when interpreting the results of Albania, Moldova and Montenegro, due to the smaller number of interviews having been conducted in these countries.

Q5 Which type of support does your company rely on in its efforts to be more resource efficient?

	Its own financial resources	Its own technical expertise	External support	Other	Don't know/No answer
EU27	64▲4	54▼-5	24▲1	2▲1	5▼-1
BE	73▲6	40▼-8	20▼-4	5▲2	10▼-4
BG	62▼-3	59▼-4	21▲8	2▲2	3▲2
CZ	79▲10	72▲2	20▲3	1▼-1	4▲1
DK	45▼-3	59▲4	25▼-2	2▼-1	8=
DE	70▼-4	57▼-11	28▼-10	2▲2	3▼-4
EE	75▼-10	66▲23	8▲4	2▲2	3▼-2
IE	52▼-3	30▼-20	27▲4	5▲3	6▼-6
EL	76=	50▲8	18▲4	1=	1▼-1
ES	72▲31	54▲5	31▲3	2▲2	9▲3
FR	48▼-23	40▼-19	20▼-4	5▲5	8▲1
HR	74▲1	50▼-13	11▼-1	1▼-1	2=
IT	50▲7	59▼-1	27▲9	0=	2▼-2
CY	63▼-5	37▼-4	19▲7	5▼-3	7▲2
LV	64▼-4	45▼-20	16▲9	2=	4▼-1
LT	74▼-6	49▼-5	14▲6	4▲3	2=
LU	60▲1	35▼-3	28▲9	3▼-4	3▼-2
HU	67▲6	42▼-17	29▲11	2▼-1	4▲1
MT	69▼-15	50▼-9	29▲5	4▲4	5▲2
NL	63▲11	45▼-13	25▼-5	1▼-1	6▼-3
AT	79▼-2	69▲1	42▲10	2▲1	4▼-2
PL	69▲2	68▼-14	12▼-1	1▲1	2=
PT	58▼-12	41▼-10	14▲2	2▲2	8▲4
RO	92▲8	60▲35	15▲12	0▼-1	2▲1
SI	70▲10	66▲8	17▼-1	3▲1	1▼-1
SK	77▲10	68▲9	24▲13	1=	4=
FI	56▼-17	62▼-4	23▲2	2▲2	5▲1
SE	66▲14	57▲3	24▲6	1▼-1	9▼-1

Flash Eurobarometer 498 - SMEs, green markets and resource efficiency / Fieldwork: 08/11 - 10/12/2021
(%) Base: n=12 107 - SMEs undertaking resource efficiency actions
▼▲ Evolution 2021-2017 (comparison with Flash Eurobarometer 456, Sept. 2017)

Q5 Which type of support does your company rely on in its efforts to be more resource efficient?

	Its own financial resources	Its own technical expertise	External support	Other	Don't know/No answer
EU27	64▲4	54▼-5	24▲1	2▲1	5▼-1
UK	65▲8	58▲11	27▲5	0▼-2	6▼-8
TR	72▼-1	35▲4	16▲9	0=	6▲2
MK	83▼-3	19▼-15	8▼-1	1▼-2	1▲1
ME	72▲6	51▲5	12=	0=	3▼-3
RS	64▼-2	48▲1	27▲23	0▼-3	2▼-6
AL	72▼-28	36▲30	1▼-10	0=	0=
IS	78▲30	68▲12	21▲5	3=	1▼-21
NO	50▲6	49▲2	43▲24	4▼-1	9▼-1
MD	82▲6	29▲2	13▲1	0=	4▲4
US	62▼-7	54▼-21	35▼-2	0▼-1	8▼-4

Flash Eurobarometer 498 - SMEs, green markets and resource efficiency / Fieldwork: 08/11 - 10/12/2021
(%) Base: n=2 824 - SMEs undertaking resource efficiency actions
▼▲ Evolution 2021-2017 (comparison with Flash Eurobarometer 456, Sept. 2017)
Note: * new item, not included in 2017

Caution should be exercised when interpreting the results of Albania, Moldova and Montenegro, due to the smaller number of interviews having been conducted in these countries.

Q6 More precisely, which type of external support is it?

Caution should be exercised when interpreting the results due to low base sizes (<100)

	Public funding such as grants, guarantees or loans	Private funding from a bank, an investment company or venture capital fund	Private funding from friends and relatives	Advice or other non-financial assistance from public administration	Advice or other non-financial assistance from private consulting and audit companies	Advice or other non-financial assistance from business associations and clusters	Advice or other non-financial assistance from supply chain partners*	Other	Don't know/No answer
EU27	36▲11	28▼-4	10▲2	23=	39▼-9	29▼-1	30	6=	5▲1
BE	62▲32	33▼-15	14▲2	33▲4	38▲6	40▲5	24	4▼-4	6=
BG	47▲16	24▼-11	1▼-8	15▲3	19▼-11	14=	20	9▼-3	0=
CZ	30▲11	29▼-30	19▼-1	28▼-4	36▼-20	32▼-1	51	0=	5▲3
DK	13▲6	8▼-17	1▼-3	18=	34▼-31	36▼-18	30	15▲9	10▲9
DE	36▲6	22▼-9	15▲8	31▲2	24▼-12	26▼-10	40	10▲1	8▲2
EE	46▼-7	45▲17	17▲17	30▲30	10▲10	11▲11	33	1▲1	1▼-19
IE	50▲38	29▲2	11▲3	28▼-4	20▼-23	19▼-40	26	0▼-5	7▲5
EL	45▲26	24▼-4	11▲4	17▲5	29▼-30	30▲6	50	5▲5	4=
ES	30▲21	39▲2	15▲12	22▲13	48▼-13	41▲12	31	4▲3	2▲2
FR	50▲16	33▼-3	3▼-8	26▼-21	25▼-22	33▼-3	24	4▲4	7▲2
HR	41▼-9	14▲1	12▲11	23▼-2	23▲4	12▼-7	37	7▲3	17▲14
IT	22▲8	20▲5	11▲7	13▲7	64▼-4	17▲3	13	6▼-3	0▼-3
CY	32▲23	24▲8	4▲4	26▲26	38▲14	26▼-27	32	9▼-4	0=
LV	40▲14	35▲4	11▼-9	22▼-10	20▼-10	13▼-29	35	10▲8	2▲2
LT	37▲17	32▲6	7▲2	29▲5	30▲6	33▼-8	35	9▲9	6▲5
LU	41▲6	11▲8	11▲11	52▼-8	25▲10	28▲3	28	4▼-6	4▲4
HU	78▲58	42=	3▼-3	20▲5	24▼-1	19▲1	24	9▼-2	1▲1
MT	38▲21	44▼-34	4▲4	16▲8	20▲4	11▲4	10	12▲10	0=
NL	41▲10	22▼-2	7▼-10	27▲3	28▼-13	21▼-9	29	6▼-7	12▲9
AT	38▲3	30▲7	7▼-6	36▲13	43▲3	50▲6	14	11▲2	5▼-7
PL	15▼-28	29▼-20	4▼-6	26▼-6	23▼-3	21▲8	34	7▼-2	10▲10
PT	31▼-1	27▼-23	1▼-3	11▼-3	25▼-13	15▲2	14	16▲10	3▲3
RO	41▼-29	32▲30	31▼-4	17▲8	43▲42	31▼-10	53	7▼-12	1▲1
SI	32▲5	18▲7	8=	10▲3	27=	21=	23	11▲1	3▼-4
SK	43▲12	23▲14	15▼-2	38▲16	32▲5	38▲22	62	1▼-27	2▼-5
FI	16▼-4	16▼-25	4▼-5	36▲10	35▼-8	31=	52	5▼-7	1▼-2
SE	42▲17	27▲6	0▼-14	30▲11	41▼-1	43▲11	64	6▼-7	6▲3

Flash Eurobarometer 498 - SMEs, green markets and resource efficiency / Fieldwork: 08/11 - 10/12/2021
(%) Base: n=3 206 - SMEs undertaking resource efficiency actions via external support
▼▲ Evolution 2021-2017 (comparison with Flash Eurobarometer 456, Sept. 2017)
Note: * new item, not included in 2017

Q6 More precisely, which type of external support is it?

Caution should be exercised when interpreting the results due to low base sizes (<100)

	Public funding such as grants, guarantees or loans	Private funding from a bank, an investment company or venture capital fund	Private funding from friends and relatives	Advice or other non-financial assistance from public administration	Advice or other non-financial assistance from private consulting and audit companies	Advice or other non-financial assistance from business associations and clusters	Advice or other non-financial assistance from supply chain partners*	Other	Don't know/No answer
EU27	36▲11	28▼-4	10▲2	23=	39▼-9	29▼-1	30	6=	5▲1
UK	35▲17	19▲3	11▲6	37▲7	22▼-16	39▼-12	50	10▲5	1▼-11
TR	36▲3	24▲6	9▼-34	11▼-28	19▼-31	27▼-14	23	5▲4	19▲19
MK	8▼-30	38▲33	22▼-6	3=	12▲9	14▲13	6	6▲5	13▼-17
ME	53▲12	17▼-44	1▼-31	45▲40	30▲30	7▼-11	7	0=	0=
RS	74▲59	29▼-33	7▲4	27▲15	13▼-8	22▲16	24	3▲3	5▼-6
AL	8▲1	12▼-37	66▲54	8▼-44	0=	8▲2	0	0=	8▲7
IS	25▲24	18▼-32	15▲4	13▼-2	35▼-13	25▲2	36	5▼-1	0▼-16
NO	42▲7	23▲7	4▲4	50▲38	45▲26	42▲17	48	4▼-1	0▼-21
MD	27▼-60	91▲91	33▲26	4▲2	35▲23	36▲36	5	0▼-1	0=
US	35▲9	29▼-4	5▼-6	43▲4	24▼-25	45▼-18	60	3▼-2	2▼-6

Flash Eurobarometer 498 - SMEs, green markets and resource efficiency / Fieldwork: 08/11 - 10/12/2021
(%) Base: n=781 - SMEs undertaking resource efficiency actions via external support
▼▲ Evolution 2021-2017 (comparison with Flash Eurobarometer 456, Sept. 2017)
Note: * new item, not included in 2017

Q7 Did your company encounter any of the following difficulties when trying to set up resource efficiency actions?

	Complexity of administrative or legal procedures	Difficulty to adapt environmental legislation to your company	Technical requirements of the legislation not being up to date	Difficulty in choosing the right resource efficiency actions for your company	Cost of environmental actions	Lack of specific environmental expertise	Lack of supply of required materials, parts, products or services	Lack of demand for resource efficient products or services	Complexity associated with environmental labelling and certification*	Other	None	Don't know/ No answer
EU27	34▼-1	21▼-1	18▼-3	21=	27▲2	23▲2	24▲9	20▲3	19	1=	32▼-5	3▲1
BE	36▲3	22▲4	25▲3	23=	20▼-1	19▲2	28▲13	21▲2	20	1=	34▼-6	4▲1
BG	27▼-6	11▼-2	17▼-2	9=	10▼-4	10▼-1	11=	8▼-7	7	4▼-1	35▲5	8▲4
CZ	47▼-4	16▲2	22▲1	18▲3	25▼-1	24▲2	30▲16	23▲10	18	1=	23▼-4	1▼-1
DK	10▼-11	10▼-4	9▼-8	11▼-4	15▼-11	10▼-3	17▲8	8▼-5	12	5▲4	43=	6▲2
DE	29▲6	16=	16▲4	16=	22▲4	19▲5	30▲12	19▲5	26	2▲1	37▼-7	3▲2
EE	16▲7	12▲5	12▲5	13▲11	18▲9	14▲11	21▲14	22▲13	17	0▼-3	43▼-21	4▲1
IE	9▼-8	6▼-10	5▼-7	12▼-11	22▼-3	8▼-16	21▲6	9▼-11	8	1=	12▼-29	10▲1
EL	40▼-3	18▼-2	25▼-7	22▲1	36▲14	30▲7	29▲11	23▼-3	28	0▼-1	28▼-4	0▼-2
ES	53▲16	32▲2	28▲5	34▲10	45▲14	47▲15	39▲17	38▲13	29	0=	18▼-17	1▼-3
FR	24▼-29	16▼-31	14▼-33	19▼-19	23▼-21	16▼-18	23▲6	15▼-13	14	2=	33▲13	5▲3
HR	41▼-5	21▲9	27▼-1	14▲1	17▲3	18▲5	21▲13	23▲11	11	1▼-1	25▼-5	3▼-3
IT	33▲5	19▲6	15▲7	16▲6	24▲9	17▲5	9▲1	12▲5	14	1▼-1	45▼-7	1▼-1
CY	34▲23	11▲5	16▲8	21▲19	39▲32	22▲14	27▲25	18▲13	19	0▼-8	33▼-27	2=
LV	33▲1	18▲6	23▲3	24▲8	27▲9	24▲9	30▲16	22=	17	1▼-3	21▼-8	3▼-1
LT	28▲14	11▲3	11▲4	20▲12	14▲10	20▲12	26▲18	20▲13	12	0▼-3	33▼-16	1▼-4
LU	31▲2	25▲6	21▲1	22▲6	27▲6	17=	23▲9	20▼-1	19	1▼-2	23▼-12	7▲2
HU	33▲5	21=	14=	23▲9	25▲4	15▲4	24▲13	16▲6	11	1▼-1	29▼-6	4▲1
MT	20▲5	9▲1	17▲8	11▲7	13▲1	15▲8	22▲15	12▲1	9	5▼-5	41▼-11	5=
NL	14▼-8	12▼-2	12▼-2	14▼-2	19=	18▲5	17▲6	10▼-2	17	0▼-2	49▲5	3▲2
AT	35▲5	21▲2	17▼-1	18▼-2	29▲6	21▲3	17▲5	20▲3	15	0=	36▼-6	1▼-1
PL	44▼-9	40▲9	19▼-5	26▼-1	27=	26▼-2	23▲8	24▲3	25	1▲1	20▼-4	4▲4
PT	20▼-5	17▼-2	10▼-3	13▼-8	17▼-6	10▼-8	16▲5	10▼-3	9	5▲2	25▼-22	13▲12
RO	47▲11	36▲14	33▲6	29▲13	31▼-1	34▲17	30▲16	32▲15	27	0▼-2	28▲5	1▲1
SI	19▼-7	12▼-2	13▲2	12▲4	24▲6	13▼-4	20▲6	16▲4	14	6▲3	41▼-7	1▼-1
SK	51▲22	23▲9	20▲12	18▲13	30▲18	22▲14	30▲21	25▲16	25	1▼-1	23▼-17	1▼-8
FI	22▲2	18▲5	20▲3	22▼-4	23▲5	14=	18▲3	18=	23	1▼-1	28▼-10	3▲1
SE	29▲5	21▲13	20▲12	33▲9	35▲10	22▲8	30▲18	25▲3	23	0▼-3	30▼-7	1▼-3

Flash Eurobarometer 498 - SMEs, green markets and resource efficiency / Fieldwork: 08/11 - 10/12/2021
(%) Base: n=12 107 - SMEs undertaking resource efficiency actions
▼▲ Evolution 2021-2017 (comparison with Flash Eurobarometer 456, Sept. 2017)
Note: * new item, not included in 2017

Q7 Did your company encounter any of the following difficulties when trying to set up resource efficiency actions?

	Complexity of administrative or legal procedures	Difficulty to adapt environmental legislation to your company	Technical requirements of the legislation not being up to date	Difficulty in choosing the right resource efficiency actions for your company	Cost of environmental actions	Lack of specific environmental expertise	Lack of supply of required materials, parts, products or services	Lack of demand for resource efficient products or services	Complexity associated with environmental labelling and certification*	Other	None	Don't know/ No answer
EU27	34▼-1	21▼-1	18▼-3	21=	27▲2	23▲2	24▲9	20▲3	19	1=	32▼-5	3▲1
UK	15▲2	17▲5	10▲2	16▲7	26▲13	24▲9	28▲20	23▲7	15	1▼-1	34▼-23	4▼-2
TR	38▼-10	31▼-1	22▼-8	30▼-8	41▲4	26▼-12	36▲4	28▼-7	27	0=	27▲2	4▲3
MK	24▼-8	8▼-21	14▲3	10▼-8	12▼-3	10▼-4	19▼-3	12▼-6	7	3=	31▲3	4▲2
ME	31▲6	10▲2	22▲13	11▼-2	13▼-5	23▲7	23▲11	24▲7	17	1▲1	38=	2▼-7
RS	38▲11	20▲14	25▲20	17▲9	14▲6	22▲15	27▲20	20▲11	13	2▼-1	24▼-12	3▼-9
AL	13=	7▲1	2▼-2	12▲7	16▼-14	21▼-4	27▲20	9▼-31	0	8▲8	35▲34	0▼-8
IS	23▼-17	8▼-3	13▼-16	10▼-13	18▼-5	19▼-3	11▼-6	10▼-19	21	2▼-1	48▲32	0▼-16
NO	22▲6	21▲9	26▲15	31▲13	29▲5	27▲10	36▲21	31▲4	26	0▼-6	19▼-14	4▼-3
MD	26▲5	19▲7	21▲4	24▲23	32▲13	26▲18	35▲12	32▲16	9	1▼-1	18=	5▼-11
US	22▲5	14=	16▼-6	19▲3	31▲11	19▲2	36▲16	20▼-4	16	2▼-1	33▼-8	2▼-5

Flash Eurobarometer 498 - SMEs, green markets and resource efficiency / Fieldwork: 08/11 - 10/12/2021
(%) Base: n=2 824 - SMEs undertaking resource efficiency actions
▼▲ Evolution 2021-2017 (comparison with Flash Eurobarometer 456, Sept. 2017)
Note: * new item, not included in 2017

Caution should be exercised when interpreting the results of Albania, Moldova and Montenegro, due to the smaller number of interviews having been conducted in these countries.

Q8 Which of the following would help your company the most to be more resource efficient?

	A tool to self-assess how resource efficient your company is with respect to other companies	Consultancy on how to improve resource efficiency in your company	Grants or subsidies	Advice on funding possibilities and financial planning for resource efficiency investments	Demonstration of new technologies or processes to improve resource efficiency	Database with case studies that show the benefits of resource efficiency for companies	Better cooperation between companies across sectors so that new processes to re-use waste and by-products can be develop	Clearer rules on the use of secondary raw materials	Other	None	Don't know/No answer
EU27	15▲2	25▲1	36=	20▼-1	22▼-1	16=	26▲6	19▲2	1=	17▼-3	4▲1
BE	25▲4	22▲5	36▲3	20▼-7	23▲3	19▲6	30▲4	18▲7	2▲1	16▼-4	2▼-3
BG	6▲3	20▲3	35▲2	14▼-3	19=	15▲1	19▲2	6▼-5	3▼-1	13▼-7	5▲2
CZ	7▼-1	18▲1	32▼-5	22▲4	34▲4	16=	31▲4	22▲1	3▲2	15▼-9	3▲2
DK	9▼-10	23▼-7	29▲1	13▼-4	17▼-5	8▼-9	17=	4▼-2	4▲2	24▼-2	9▲3
DE	20▼-2	24▲3	31▲1	18▼-1	23▼-7	18▼-1	19▲1	18▲5	2▲2	25▲2	2▼-1
EE	6▲1	18▲12	29▲11	21▲11	21▲11	9▲7	25▲17	7▲3	1▼-1	28▼-28	6▲3
IE	20▼-2	19▼-3	45▲11	17▼-12	27▲3	14▼-7	23▲2	18▲5	2▲2	8▼-7	4▼-6
EL	18▲4	33▲6	54▲8	32▲6	23▲2	17▲5	23▲4	12▲1	0▼-1	13▼-2	0▼-1
ES	19▲11	33▲3	51▲9	27=	22▼-4	19▼-5	35▲14	24▲7	1▲1	6▼-6	2▲1
FR	10▼-5	20▼-11	35▼-10	15▼-14	16▼-11	12▼-7	20▼-11	11▼-10	1=	23▲13	7▲6
HR	7▼-1	24▼-1	45▲4	28▲7	21▼-2	10▼-5	27▲8	12▼-7	0▼-1	13▼-3	3=
IT	15▲4	29▲8	22▼-9	20▲6	21▲10	15▲7	31▲19	28▲8	1=	16▼-11	4▲1
CY	18▲14	32▲14	50▲16	20▲3	21▲3	11▲6	25▲14	9▲7	0▼-3	19▼-17	0▼-4
LV	13▲4	21▲2	36▲14	26▲1	25▲5	16▲2	21▲10	21▲11	1▼-1	11▼-21	2=
LT	15▲8	26▲12	36▲18	26▲7	24▲6	13▲8	22▲9	15▲4	2▲1	18▼-14	1▼-4
LU	14▲3	28▲4	27=	27▲6	28▲7	17▲6	24▼-1	17▲2	5=	14▼-7	3=
HU	10▲6	17▲5	45=	21▲7	31▲10	17▲12	20▲5	12▲3	0▼-3	13▼-13	3▲3
MT	11▲6	19▼-12	60=	36▲3	21▲12	18▲15	25▲19	8▲1	3=	16▼-5	6=
NL	22▲6	26▲1	35▲2	15▼-9	21▼-2	15=	32▲6	9▼-8	1=	23▲2	5▲5
AT	22▼-5	23▼-1	30▼-5	26▲7	23▼-6	23▼-6	20▲1	16▼-3	4▲2	14▼-3	2=
PL	11▼-1	18▼-5	32▼-13	16▼-9	20▼-7	14▲2	22▲4	31▲3	1=	20▲3	2=
PT	8▼-6	25▲7	26▲6	21▼-2	17▼-12	9▼-6	21▼-2	19▲5	4▲3	9▼-11	11▲7
RO	11▲5	29▲6	52▲24	32▲12	24▲14	22▲12	33▲18	20=	0▼-2	9▼-14	2▼-2
SI	4▼-4	23▼-3	55▲11	26▲5	15▼-14	9▼-4	16▼-12	9▼-1	3▲1	18=	3▲3
SK	8▲4	22▲5	53▲25	28▲18	26▲10	17▲7	24▲11	24▲12	0▼-1	11▼-13	3▼-3
FI	19▲3	17▼-6	28▲4	16▲3	22▲1	14▼-5	31▼-2	15▲3	2▲1	21▲1	2▼-3
SE	26▲1	34▲4	36▲8	23▲7	25▼-1	17▲4	34▲11	17▲9	1▼-2	10▼-10	2▼-1

Flash Eurobarometer 498 - SMEs, green markets and resource efficiency / Fieldwork: 08/11 - 10/12/2021
(%) Base: n=13 343 - All SMEs
▼▲ Evolution 2021-2017 (comparison with Flash Eurobarometer 456, Sept. 2017)

Q8 Which of the following would help your company the most to be more resource efficient?

	A tool to self-assess how resource efficient your company is with respect to other companies	Consultancy on how to improve resource efficiency in your company	Grants or subsidies	Advice on funding possibilities and financial planning for resource efficiency investments	Demonstration of new technologies or processes to improve resource efficiency	Database with case studies that show the benefits of resource efficiency for companies	Better cooperation between companies across sectors so that new processes to re-use waste and by-products can be develop	Clearer rules on the use of secondary raw materials	Other	None	Don't know/No answer
EU27	15▲2	25▲1	36=	20▼-1	22▼-1	16=	26▲6	19▲2	1=	17▼-3	4▲1
UK	22▲11	17▲5	45▲12	32▲7	20=	12▼-1	30▲9	15▲3	0▼-2	14▼-16	2▼-4
TR	22▲1	21▼-6	22▼-5	26▼-5	29▲2	23▼-4	28▼-1	19▲7	0▼-3	14▲6	4▲2
MK	4▼-3	17▼-9	53▲12	22▲6	14▲5	6▼-1	14▼-3	12▲8	2▲2	10▼-20	2=
ME	10▲8	24▲9	55▲8	30▲20	11▼-10	3▼-5	17▼-8	19▲6	0▼-1	16▲9	2▼-4
RS	7▲4	25▲10	56▲32	16▲4	22▲5	13▲9	25▲8	18▲5	1▼-4	11▼-9	1▼-6
AL	6▼-1	21▲10	18▲13	19▲5	12▼-4	4▼-1	22▲19	7▼-4	4▼-3	31▲24	0▼-31
IS	12▼-4	31▲13	31▲19	14▲1	23▼-1	14▼-1	35▲11	12▲1	1▼-2	27▲20	1▼-26
NO	18▲10	19▲9	34▲19	30▲18	27▲6	17▲7	42▲24	22▲12	1▼-4	9▼-25	4▼-6
MD	2▼-6	32▲18	48▼-2	27▲17	29▲15	29▲16	19▼-2	22▲16	7▲4	6▼-9	3▲2
US	17▼-1	19▲5	38▲18	17▼-6	22▼-2	9▼-6	22▼-5	10▼-2	1▲1	20▲2	3▼-8

Flash Eurobarometer 498 - SMEs, green markets and resource efficiency / Fieldwork: 08/11 - 10/12/2021
(%) Base: n=3 200 - All SMEs
▼▲ Evolution 2021-2017 (comparison with Flash Eurobarometer 456, Sept. 2017)
Note: * new item, not included in 2017

Caution should be exercised when interpreting the results of Albania, Moldova and Montenegro, due to the smaller number of interviews having been conducted in these countries.

Q14 Does your company have a concrete strategy in place to reduce your carbon footprint and become climate neutral or negative?

	Yes	No, but you are planning to define a strategy	No, and you are not planning to do so	You are already climate neutral	Don't know/No answer
EU27	20	19	53	4	4
BE	16	26	50	2	7
BG	13	13	65	2	6
CZ	12	17	68	0	2
DK	22	12	57	3	7
DE	26	16	51	5	3
EE	11	18	60	5	6
IE	21	36	20	8	15
EL	16	33	44	3	4
ES	15	14	66	1	3
FR	24	16	53	4	4
HR	10	31	45	8	7
IT	21	28	45	6	0
CY	6	16	54	19	6
LV	11	19	64	4	2
LT	18	24	44	12	2
LU	25	30	39	4	2
HU	15	21	55	5	4
MT	20	51	23	0	5
NL	27	21	45	3	5
AT	23	8	34	30	6
PL	10	12	70	3	5
PT	24	23	28	6	19
RO	19	37	39	4	1
SI	16	16	59	7	1
SK	12	20	61	2	4
FI	20	16	57	4	3
SE	38	7	48	5	3

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(%) Base: n=13 343 - All SMEs

Q14 Does your company have a concrete strategy in place to reduce your carbon footprint and become climate neutral or negative?

	Yes	No, but you are planning to define a strategy	No, and you are not planning to do so	You are already climate neutral	Don't know/No answer
EU27	20	19	53	4	4
UK	20	27	47	1	4
TR	12	13	69	1	6
MK	19	25	31	19	6
ME	9	30	49	8	4
RS	13	33	34	13	7
AL	16	20	42	15	7
IS	34	23	38	3	2
NO	28	25	39	3	5
MD	2	39	43	12	4
US	15	16	61	3	5

Flash Eurobarometer 498 - SMEs, green markets and resource efficiency / Fieldwork: 08/11 - 10/12/2021
(%) Base: n=3 200 - All SMEs
▼▲ Evolution 2021-2017 (comparison with Flash Eurobarometer 456, Sept. 2017)
Note: * new item, not included in 2017

Caution should be exercised when interpreting the results of Albania, Moldova and Montenegro, due to the smaller number of interviews having been conducted in these countries.

Q15 What actions is your company undertaking to be become climate neutral?

Caution should be exercised when interpreting the results due to low base sizes (<100)

	Generally reducing carbon emissions of your company	Adopting/purchasing new technological solutions to reduce emissions	Developing new technological solutions to reduce emissions	Offsetting carbon emissions by purchasing carbon credits or funding an equivalent carbon saving elsewhere	Other	None	Don't know/No answer
EU27	53	49	34	12	5	8	4
BE	68	62	31	0	8	9	2
BG	33	60	22	5	1	4	0
CZ	89	61	47	13	4	4	0
DK	58	37	23	4	11	2	3
DE	67	52	25	24	3	14	1
EE	72	53	29	32	0	4	3
IE	58	45	25	30	0	0	5
EL	66	69	43	2	0	11	0
ES	71	69	41	11	5	1	4
FR	56	29	36	8	3	14	6
HR	45	59	18	4	0	7	6
IT	13	32	27	8	15	5	8
CY	11	20	16	3	10	47	11
LV	54	43	36	11	1	13	4
LT	63	36	16	1	2	20	0
LU	39	48	34	25	1	2	4
HU	58	59	30	18	10	4	8
MT	32	45	16	6	1	0	9
NL	40	54	44	8	0	10	3
AT	23	30	18	16	3	14	2
PL	63	80	40	10	1	0	3
PT	37	36	25	9	8	7	9
RO	84	78	51	18	3	1	0
SI	54	60	36	16	4	1	0
SK	58	70	44	9	0	4	0
FI	50	52	32	6	8	11	0
SE	87	60	43	14	2	5	0

Flash Eurobarometer 498 - SMEs, green markets and resource efficiency / Fieldwork: 08/11 - 10/12/2021
(%) Base: n=2 930 – SMEs with a concrete strategy in place to reduce carbon footprint

Q15 What actions is your company undertaking to be become climate neutral?

Caution should be exercised when interpreting the results due to low base sizes (<100)

	Generally reducing carbon emissions of your company	Adopting/purchasing new technological solutions to reduce emissions	Developing new technological solutions to reduce emissions	Offsetting carbon emissions by purchasing carbon credits or funding an equivalent carbon saving elsewhere	Other	None	Don't know/No answer
EU27	53	49	34	12	5	8	4
UK	75	58	38	26	1	2	3
TR	81	65	59	40	0	11	2
MK	19	43	34	1	4	12	4
ME	31	47	22	15	0	22	0
RS	32	28	38	4	8	23	5
AL	20	63	27	10	0	0	0
IS	58	39	28	34	4	10	0
NO	71	68	43	28	2	5	4
MD	19	35	39	0	3	23	0
US	56	76	37	21	0	12	3

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(%) Base: n=685 – SMEs with a concrete strategy in place to reduce carbon footprint

Q9 Does your company offer green products or services?

	Yes	No, but you are planning to do so in the next 2 years	No and you are not planning to do so	Don't know/No answer
EU27	32▲7	11▲3	54▼-9	3▼-1
BE	35▲7	13▲5	45▼-12	8=
BG	23▲8	11▼-1	64▲1	2▼-9
CZ	19▼-2	8▲1	72▲5	1▼-4
DK	37▲5	3=	54▼-9	6▲4
DE	30▼-1	9▲5	59▼-3	2▼-1
EE	27▲9	9▼-5	58▼-4	5=
IE	29▲6	27▲18	37▼-20	7▼-4
EL	37▲11	25▲9	38▼-13	0▼-6
ES	33▲4	10▼-1	55▼-2	3▼-1
FR	38▲15	10▼-5	50▼-10	2▼-1
HR	27▲6	18▲5	45▼-14	10▲3
IT	28▲12	12▲8	58▼-21	2▲1
CY	32▲14	18▲9	49▼-13	2▼-9
LV	22▲2	12▲7	63▼-4	3▼-5
LT	31▲12	11▲7	54▼-16	5▼-2
LU	41▲16	12▲4	46▼-14	2▼-5
HU	21▲10	9▲5	64▼-17	6▲2
MT	29▲4	11▲5	57▼-5	3▼-3
NL	45▲8	5▼-2	48▼-1	2▼-5
AT	44▲2	10▼-2	45▲4	2▼-3
PL	25▼-1	9▼-1	62▲2	4=
PT	27▼-2	21▲10	33▼-19	20▲11
RO	24▲12	30▲11	43▼-23	4=
SI	37▲14	9▼-1	53▼-11	1▼-3
SK	41▲11	13▲8	44▼-16	3▼-2
FI	41▲4	7=	50▼-3	2=
SE	43▲4	5=	47▼-4	5▼-1

Flash Eurobarometer 498 - SMEs, green markets and resource efficiency / Fieldwork: 08/11 - 10/12/2021
(%) Base: n=13 343 - All SMEs
▼▲ Evolution 2021-2017 (comparison with Flash Eurobarometer 456, Sept. 2017)

Q9 Does your company offer green products or services?

	Yes	No, but you are planning to do so in the next 2 years	No and you are not planning to do so	Don't know/No answer
EU27	32▲7	11▲3	54▼-9	3▼-1
UK	34▲15	14▲5	48▼-18	4▼-2
TR	19▲7	12▼-2	64▼-5	5▲1
MK	36▲27	25▲13	34▼-41	5▲1
ME	26▲6	19▲10	49▼-16	6=
RS	25▲7	25▲15	47▼-19	4▼-2
AL	21▼-21	20▲20	49▼-3	10▲4
IS	48▲14	10▲4	40▼-1	3▼-16
NO	55▲13	17▲10	27▼-21	2▼-2
MD	38▲21	23▼-1	35▼-16	4▼-4
US	30▼-2	11▲1	55▲5	4▼-3

Flash Eurobarometer 498 - SMEs, green markets and resource efficiency / Fieldwork: 08/11 - 10/12/2021
(%) Base: n=3 200 - All SMEs
▼▲ Evolution 2021-2017 (comparison with Flash Eurobarometer 456, Sept. 2017)
Note: * new item, not included in 2017

Caution should be exercised when interpreting the results of Albania, Moldova and Montenegro, due to the smaller number of interviews having been conducted in these countries.

Q10 How much did these green products or services represent in your annual turnover of the latest available fiscal year?

	Up to 5%	6-10%	11-30%	31-50%	51-75%	More than 75%	Don't know/No answer
EU27	29▼-4	14▼-1	14▼-2	7▲1	6=	17▲3	13▲3
BE	37▲4	18▼-3	11▼-4	3▼-6	7=	16▲9	8=
BG	44▲3	13▲8	9▼-13	3▲3	5▲4	14▼-10	12▲4
CZ	46▲19	6▼-5	15▲2	8▲1	13▲6	8▼-13	4▼-10
DK	16=	6▼-12	16▼-11	6▼-1	3▼-7	32▲14	23▲17
DE	22▼-4	14▲8	14▼-6	9▼-2	7▼-4	24▲13	10▼-5
EE	25▼-1	10▲3	12▼-1	13▲3	4▼-6	24▲3	11▼-2
IE	26▼-16	22▲4	14▼-2	3▼-3	7▲4	9▲3	19▲11
EL	19▼-14	14▼-3	16=	7▲1	13▲5	24▲13	6▼-2
ES	30▼-8	24▲5	15▲4	9▲1	4▼-1	10▼-3	9▲2
FR	27▼-17	11▼-2	13▼-10	10▲8	5▲2	9▲4	25▲15
HR	35▲11	13▲3	12▲1	10▼-2	12▲3	11▼-10	7▼-6
IT	35=	14▼-1	13▼-5	0=	5▲2	20▲3	12▲1
CY	24▼-14	16▲5	24▲9	6▲6	2▲2	21▼-13	7▲4
LV	29▼-1	11▲2	10▲7	11▲6	6▼-2	24▼-9	10▼-2
LT	25▼-14	21▲4	10▼-4	9▲9	9▼-2	19▲3	7▲4
LU	32▼-9	23▲8	9▼-4	0=	3▼-4	9▼-13	25▲22
HU	44▲12	11▼-2	20▲4	2▼-11	5▲3	10▼-4	7▼-2
MT	34▼-19	19▲6	13▲3	4▼-3	9▲9	13▲10	8▼-6
NL	27▼-6	7▼-13	16▲5	8▲3	5▲2	26▲6	11▲2
AT	25▼-2	21▲6	7▼-1	8▼-5	8▼-2	18▲2	14▲1
PL	34▲3	8▼-4	18▲5	6▼-5	2▼-8	17▲2	16▲7
PT	20▼-18	24▲7	9▼-2	7▲1	3▲3	28▲14	9▼-4
RO	42▼-8	12▼-4	11▼-3	5▲3	4▲3	18▲6	9▲3
SI	41▼-5	14▲1	13▲1	7▲5	3▲3	17▼-6	4=
SK	31▼-5	14▲2	15▲6	7▲1	9▲4	18▼-4	7▼-5
FI	27▼-12	16▼-2	17▲3	12▲7	8▲4	18▲2	3▼-2
SE	25▲1	9▼-11	13▲1	10▲2	9▲1	20=	15▲5

Flash Eurobarometer 498 - SMEs, green markets and resource efficiency / Fieldwork: 08/11 - 10/12/2021
(%) Base: n=4 537 - SMEs offering green products or services
▼▲ Evolution 2021-2017 (comparison with Flash Eurobarometer 456, Sept. 2017)

Q10 How much did these green products or services represent in your annual turnover of the latest available fiscal year?

	Up to 5%	6-10%	11-30%	31-50%	51-75%	More than 75%	Don't know/No answer
EU27	29▼-4	14▼-1	14▼-2	7▲1	6=	17▲3	13▲3
UK	24▼-16	11▲5	13▼-3	12▲7	11▲5	15▲2	14=
TR	43▲8	11▼-13	4▲3	13▲6	9▼-12	6▼-5	15▲13
MK	39▼-1	18▼-2	12▼-8	7▲6	5▲5	12▼-8	8▲8
ME	34▲8	9▲1	19▲11	9▼-10	14▲6	14▼-14	0▼-2
RS	22▲2	17▲10	12▼-2	5▼-8	14▲2	22▼-4	8▲1
AL	10▼-74	27▲27	3▲2	26▲26	13▲13	7▲7	15▼-1
IS	25▼-1	13▼-18	19▲10	2▲2	4▲3	31▲18	6▼-13
NO	25▼-2	11▼-4	10▲2	14▲8	9▲4	15▼-12	17▲5
MD	32▲32	2▼-17	19▼-4	1▼-21	10▲10	13▼-10	22▲11
US	44=	11▼-8	13▼-1	8=	4▼-2	13▲8	7▲3

Flash Eurobarometer 498 - SMEs, green markets and resource efficiency / Fieldwork: 08/11 - 10/12/2021
(%) Base: n=1 139 - SMEs offering green products or services
▼▲ Evolution 2021-2017 (comparison with Flash Eurobarometer 456, Sept. 2017)
Note: * new item, not included in 2017

Caution should be exercised when interpreting the results of Albania, Moldova and Montenegro, due to the smaller number of interviews having been conducted in these countries.

Q11 For how long has your company been selling green products or services?

	Less than one year	Between 1 and 3 years	More than 3 years	Don't know/No answer
EU27	8▲2	26▲3	64▼-5	3=
BE	5▼-7	27▲10	67▼-4	1▲1
BG	19▲18	29▼-1	52▼-17	0▼-1
CZ	5▼-5	32▲9	57▼-6	6▲2
DK	8▼-1	24▲9	63▼-13	5▲4
DE	7▲3	16▼-1	76=	1▼-2
EE	8▼-2	31▲1	54▼-6	7▲7
IE	21▲19	33▲16	42▼-33	4▼-2
EL	8▲4	29▼-2	62▼-2	0=
ES	7=	30▲6	63▼-4	1▼-2
FR	3▼-3	23▼-2	69▲5	5=
HR	4▲3	19=	73▼-5	4▲1
IT	8▲1	18=	67▼-8	7▲7
CY	7▲6	42▲22	51▼-22	0▼-6
LV	11▲5	33▲7	55▼-14	1▲1
LT	9▲2	39▲2	49▼-6	3▲2
LU	4▼-2	17▼-9	77▲9	2▲2
HU	7=	35▼-10	48=	11▲11
MT	3▼-9	24▲11	69▼-2	4=
NL	13▲8	40▲15	43▼-18	4▼-5
AT	3▲1	22▲6	71▼-4	4▼-2
PL	6▲3	23▲5	68▼-2	3▼-6
PT	19▲12	37▲11	36▼-27	9▲3
RO	17▲3	40▲20	42▼-18	1▼-4
SI	10▲4	28▼-10	61▲5	2▲2
SK	5▲5	28▲9	65▼-13	1▼-2
FI	6▲3	17▼-4	76▲5	1▼-4
SE	8▲3	18▼-11	73▲8	1▲1

Flash Eurobarometer 498 - SMEs, green markets and resource efficiency / Fieldwork: 08/11 - 10/12/2021
(%) Base: n=4 537 - SMEs offering green products or services
▼▲ Evolution 2021-2017 (comparison with Flash Eurobarometer 456, Sept. 2017)

Q11 For how long has your company been selling green products or services?

	Less than one year	Between 1 and 3 years	More than 3 years	Don't know/No answer
EU27	8▲2	26▲3	64▼-5	3=
UK	4▼-4	23▲4	67▲2	5▼-2
TR	13▼-20	22▲2	60▲13	5▲5
MK	13▲10	13▼-7	66▼-12	9▲9
ME	1▼-7	15▼-9	83▲24	0▼-8
RS	4▲3	21=	71▼-1	4▼-3
AL	29▲20	2▼-15	70▲4	0▼-9
IS	1▼-2	24▼-4	75▲21	0▼-15
NO	6▼-3	23▲4	68▼-3	3▲2
MD	1▼-18	18▼-11	72▲19	9▲9
US	8▼-5	18▼-11	72▲16	2=

Flash Eurobarometer 498 - SMEs, green markets and resource efficiency / Fieldwork: 08/11 - 10/12/2021
(%) Base: n=1 139 - SMEs offering green products or services
▼▲ Evolution 2021-2017 (comparison with Flash Eurobarometer 456, Sept. 2017)
Note: * new item, not included in 2017

Caution should be exercised when interpreting the results of Albania, Moldova and Montenegro, due to the smaller number of interviews having been conducted in these countries.

Q12 In terms of turnover over the past 2 years, what were the main markets (countries/ geographical regions) for your green products or services?

	National market	EU27 + UK + Iceland + Lichtenstein + Norway + Switzerland	Other European countries excluding Russia	Russia	North America countries except USA	USA	South America + Central America excluding Brazil	Brazil	Africa	Middle East	China + Hong Kong + Macau	South Korea	Japan	Other Asian countries	Australia + New Zealand + Oceania	Don't know/No answer
EU27	86▼-6	18▼-1	5▲2	2=	2▲1	3▲1	1▼-1	1▲1	2=	2▲1	2▲1	1=	1=	1=	1=	5▲5
BE	89▼-3	15▼-4	4▲1	2▲2	2▲1	2▲2	1▲1	1▲1	1▲1	3▲2	2▲1	2▲1	2▲1	2▼-1	2▲2	4▲4
BG	93▲6	14▼-1	3▲2	2▲2	0=	0=	0=	0=	0=	0=	0=	0=	0=	0=	0=	1▲1
CZ	91▲1	17▼-10	3▼-3	1▲1	0=	6▲6	1▲1	0=	0▼-2	0=	3▲3	0=	1▲1	0=	0=	1▲1
DK	87▼-6	13▼-8	3▼-1	1▼-2	0=	2▲1	0=	1▼-2	1▲1	2▲2	2▲2	0=	1▼-1	3▲1	0=	7▲7
DE	71▼-18	17▼-2	3▼-7	2=	1=	4▲1	0▼-1	0▼-1	0▼-1	0=	6▲3	2▲1	3▲2	1▼-1	0▼-2	15▲15
EE	85▼-10	25▼-2	16▲11	8▲3	2▲2	2▼-1	3▲3	0=	0▼-2	2=	2▲2	0=	2▲2	2=	2▲2	3▲3
IE	80▼-2	33▲10	9▲2	6▲6	1▼-3	8▼-3	3▲2	0=	5▲3	7▲6	4▲4	3▲2	2▲1	0▼-2	2▼-3	2▲2
EL	75▼-10	41▲14	7▲4	0▼-2	2▲2	9▲7	1▼-1	1▼-1	0▼-2	3▲1	3▼-2	1▼-1	1▼-1	2▼-1	3▲3	1▲1
ES	93▼-1	12▼-1	5▼-1	2▲2	0=	1▼-1	2▼-3	1▲1	1▼-2	3▲3	3=	1▲1	0▼-2	0=	0=	2▲2
FR	87▼-5	17▼-5	3▲3	0▼-2	2▲2	0▼-2	1▼-1	0=	4▼-1	0=	0▼-3	0▼-3	0▼-6	2=	0=	6▲6
HR	88▼-7	22▼-6	10▲4	0=	3▲3	3▲3	0=	0=	0=	0=	0=	0=	0=	0=	2▲2	5▲5
IT	93▼-5	17▲2	5▲5	4=	6▲5	7▲5	3▼-1	6▲2	3▲3	4▲4	5▲4	0=	5▲5	0=	1▼-3	3▲3
CY	64▲2	55▼-12	4▼-15	5▲4	0=	5▼-8	0=	0=	2▲2	0▼-14	1▲1	0=	0=	0▼-6	5▲5	0=
LV	68▼-16	37▲4	2=	0▼-2	2▲2	6▲4	0=	0=	0=	0=	0=	0=	0▼-2	1▲1	0=	1▲1
LT	80▼-11	10▼-22	9▲3	0=	0=	3=	0=	0=	0=	0=	0=	0=	0▼-3	0=	0▼-3	13▲13
LU	80▼-3	32▼-10	12▲10	2▲2	3▲1	5▲5	2▲2	0=	3▼-9	4▲4	5▲3	0=	0=	0=	0=	3▲3
HU	65▼-21	19▼-1	14▲10	0=	0=	0=	0=	0=	0=	0=	0=	0=	0=	0=	0=	12▲12
MT	75▼-10	18▲1	6▼-3	0▼-2	0▼-2	7▲5	5▲3	2=	3▲2	0▼-2	4▲2	2=	5▲3	0▼-2	4▲2	4▲4
NL	80▼-15	19▼-8	9▲8	0▼-1	1▼-1	2=	0▼-2	0=	1=	3▲2	1▲1	0=	0▼-1	1▼-2	0=	10▲10
AT	81▼-5	30▲3	8▲3	2▲1	1▲1	0=	0=	0=	0=	0=	4▲1	0▼-1	1=	0▼-1	0▼-1	0=
PL	98▲6	14▼-7	6▲2	4▲3	3▲2	3▲3	0=	2▲2	0▼-2	0=	0=	0=	0=	1▲1	1▲1	0=
PT	82▼-12	29▲17	14▲14	2▲2	3▲3	3▲3	4▲4	4▲4	9▲5	4▲4	3▲3	2▲2	2▲2	0=	3▲3	3▲3
RO	90▼-5	12▲7	6▼-2	1▲1	1▲1	3▲3	1▲1	1▲1	1▲1	1▲1	1▲1	1▲1	1▲1	1▼-4	1▲1	5▲5
SI	73▼-14	40▲22	1▼-2	1▼-4	0=	1▼-2	0▼-3	0=	0=	0▼-6	0▼-4	0=	0=	0▼-3	0=	0=
SK	89▼-5	25▲13	8▲8	1▼-1	2▲2	2▲1	0=	0=	0=	0▼-2	1▲1	0=	2▲2	1▲1	1▲1	0=
FI	86▼-14	15▲11	3▲1	3▲2	1▼-1	1▼-1	1▼-1	0=	0=	0▼-1	0▼-2	0=	0=	0=	0▼-1	4▲4
SE	92▲1	8▼-12	5▼-4	0▼-4	0▼-4	2▼-2	0▼-4	0▼-2	0▼-2	0▼-2	0▼-4	0▼-3	0▼-3	0▼-3	0▼-2	7▲7

Flash Eurobarometer 498 - SMEs, green markets and resource efficiency / Fieldwork: 08/11 - 10/12/2021
(%) Base: n=4 537 - SMEs offering green products or services
▼▲ Evolution 2021-2017 (comparison with Flash Eurobarometer 456, Sept. 2017)

Q12 In terms of turnover over the past 2 years, what were the main markets (countries/ geographical regions) for your green products or services?

	National market	EU27 + UK + Iceland + Lichtenstein + Norway + Switzerland	Other European countries excluding Russia	Russia	North America countries except USA	USA	South America + Central America excluding Brazil	Brazil	Africa	Middle East	China + Hong Kong + Macau	South Korea	Japan	Other Asian countries	Australia + New Zealand + Oceania	Don't know/No answer
EU27	86▼-6	18▼-1	5▲2	2=	2▲1	3▲1	1▼-1	1▲1	2=	2▲1	2▲1	1=	1=	1=	1=	5▲5
UK	61▼-31	32▲18	2▲1	2▲1	2▲2	4▼-1	2▲2	2▲2	3▲3	2▲1	4▲2	1▲1	2▲2	3▼-1	2▲2	12▲12
TR	24▼-66	21▲12	3▼-5	8▲8	2▲2	3▲3	0=	0=	13▲13	5▲4	3▲2	0=	0=	16▲16	5▼-4	32▲32
MK	92▼-4	7▼-3	5▲2	0=	0=	2▲2	0=	0=	2▲2	1▲1	0=	0=	1▲1	1▲1	0=	1▲1
ME	98▲6	7▼-4	1▼-21	0=	0=	0=	0=	0=	0=	0=	0=	0=	0=	0=	0=	0=
RS	93▲2	18▲12	18▲12	0▼-13	0=	2▲2	0=	0=	2▲2	0=	0=	0=	0=	0=	2▲2	3▲3
AL	66▼-34	24▲24	14▲14	0=	0=	0=	0=	0=	0=	0=	0=	0=	0=	0=	0=	0=
IS	87▼-7	23▲13	10▲5	5▲1	8▼-1	11=	7▲2	3▼-1	7▲2	7▲3	8▲4	8▲3	8▲3	7▲3	7▲3	0=
NO	90▲1	24▲8	4▼-6	3▼-2	3▼-1	3▼-1	3▼-1	3▼-3	6▼-1	3▼-1	3▼-4	3▼-1	3▼-3	3▼-5	3▲1	2▲2
MD	90▼-10	11▼-8	3▲3	1▲1	0▼-1	0=	0=	0=	0=	0=	0=	0=	0=	0=	0=	0=
US	91▼-5	0=	1▲1	0=	5▲1	-	2▲2	1▲1	0=	1▲1	0▼-1	0=	2▲2	3▲3	1▲1	6▲6

Flash Eurobarometer 498 - SMEs, green markets and resource efficiency / Fieldwork: 08/11 - 10/12/2021
(%) Base: n=1 139 - SMEs offering green products or services
▼▲ Evolution 2021-2017 (comparison with Flash Eurobarometer 456, Sept. 2017)
Note: * new item, not included in 2017

Caution should be exercised when interpreting the results of Albania, Moldova and Montenegro, due to the smaller number of interviews having been conducted in these countries.

Q13 What type of support does your company rely on for the production of its green products or services?

	Its own financial resources	Its own technical expertise	External support	Other	Don't know/No answer
EU27	62▲1	56▼-2	24▼-4	2▲1	7▲2
BE	67▲2	57▼-2	26▼-9	4▲2	5▼-5
BG	70▲9	52▼-22	17▲5	6▲2	3▲2
CZ	73▼-1	79▲10	31▲7	0=	4▲2
DK	39▲11	57▼-7	28▼-1	5▲1	12▲6
DE	59▼-11	65▼-5	25▼-21	4▲4	4▲1
EE	79▼-5	71▲25	9▲6	3▲3	9▲3
IE	63▲2	32▼-15	26▲1	5▲5	3▼-2
EL	72▲6	51▲8	14▼-1	3▼-1	1▼-6
ES	71▲29	65▲20	37▲13	0▼-4	4▼-1
FR	45▼-28	37▼-24	26▼-9	3▲3	16▲11
HR	72▲3	64=	19▲5	5▲5	5▼-2
IT	53▼-12	66▲15	27▼-9	0=	3=
CY	57▼-5	55▲31	17▼-3	3▼-4	7=
LV	79▲3	44▼-22	13▼-2	1▼-1	0▼-5
LT	69▼-10	43=	10▲2	7▲6	3=
LU	53▼-22	35▲12	26▲2	8▲7	9▲7
HU	69▲20	48▼-17	26▲6	3▼-6	7▲7
MT	60▼-20	39▲4	20▼-9	8▲8	13▲4
NL	65▲13	50=	20▼-10	1=	9▼-1
AT	69▼-8	70▼-4	47▲7	6▲3	4▼-2
PL	72▲13	57▼-16	9▼-6	0=	7▲7
PT	62▲5	40▼-17	5▼-1	1▲1	12▲4
RO	89▲6	62▲41	10▲6	3▲3	0▼-10
SI	67▲11	56▲1	17▼-6	2▼-6	4▲4
SK	79▲11	66▲12	24▲15	0▼-6	6▲4
FI	65▲15	71▲1	22▼-5	2▼-1	2▲1
SE	53▲15	47▼-9	28▲4	3▼-2	9▲2

Flash Eurobarometer 498 - SMEs, green markets and resource efficiency / Fieldwork: 08/11 - 10/12/2021
(%) Base: n=4 537 - SMEs offering green products or services
▼▲ Evolution 2021-2017 (comparison with Flash Eurobarometer 456, Sept. 2017)

Q13 What type of support does your company rely on for the production of its green products or services?

	Its own financial resources	Its own technical expertise	External support	Other	Don't know/No answer
EU27	62▲1	56▼-2	24▼-4	2▲1	7▲2
UK	56▲1	53=	42▼-2	0=	10▲6
TR	72▼-20	44▲15	12▲12	0=	9▲9
MK	86▼-11	18▼-10	8▲7	1▲1	4▲4
ME	67▼-10	51▲11	14▼-4	0=	11▲11
RS	80▲11	56▲28	13▼-13	4▲4	1▼-1
AL	67▼-33	29▲29	37▲37	0=	0=
IS	82▲30	63▲6	36▲4	0▼-3	0▼-12
NO	53▲2	54=	33▲17	4▲4	8▼-11
MD	87▲22	51▲24	2▼-9	0=	1▼-16
US	51▼-26	35▼-35	47=	5▲3	3▼-1

Flash Eurobarometer 498 - SMEs, green markets and resource efficiency / Fieldwork: 08/11 - 10/12/2021
(%) Base: n=1 139 - SMEs offering green products or services
▼▲ Evolution 2021-2017 (comparison with Flash Eurobarometer 456, Sept. 2017)
Note: * new item, not included in 2017

Caution should be exercised when interpreting the results of Albania, Moldova and Montenegro, due to the smaller number of interviews having been conducted in these countries.

DX1 Which type of external support does your company get for the production of its green products or services?

Caution should be exercised when interpreting the results due to low base sizes (<100)

	Public funding such as grants, guarantees or loans	Private funding from a bank, an investment company or venture capital fund	Private funding from friends and relatives	Advice or other non-financial assistance from public administration	Advice or other non-financial assistance from private consulting and audit companies	Advice or other non-financial assistance from business associations and clusters	Advice or other non-financial assistance from supply chain partners*	Other	Don't know/No answer
EU27	20▲8	20=	8▼-5	13▼-3	21▼-8	23▼-4	35	12▼-6	11▼-1
BE	19▲12	15▼-2	14▲1	5▼-12	14▼-15	18▼-17	37	11▲6	18▼-6
BG	40▲20	3▼-33	0=	16▲16	2▼-4	3▼-2	36	21▼-15	1▼-1
CZ	23▲15	15▲2	35▲15	27▲27	40▼-1	12▼-44	86	6▼-3	0▼-7
DK	1▼-2	8▼-10	0=	11▼-9	19▼-12	38▼-20	26	12▼-6	20▲11
DE	17▼-9	19▼-6	11▲8	11▼-9	6▼-19	24▼-2	58	9▼-2	0▼-20
EE	35▲23	23▼-65	3▲3	5▲5	0=	5▲4	29	2▼-86	11▲11
IE	24▲11	28▲20	15▲11	40▲21	30▲22	67▲15	19	8▼-12	9▲3
EL	24▲19	50▲34	6▲6	1▼-3	12▼-75	9▼-7	48	3▼-8	1▲1
ES	12▲12	32▲11	3▼-15	16▲7	38▼-6	48▲18	37	10▼-13	1▲1
FR	15▲10	11▲1	1▼-8	7▼-15	9▼-17	11▼-27	14	28▲7	25▲8
HR	5▼-17	14▲12	0▼-21	1▼-16	7▼-26	1▼-16	58	19▲16	1▼-10
IT	32▲21	22▼-3	14▲3	9▼-8	24▼-3	13▲2	17	8▼-11	16▲16
CY	12▲8	30▼-23	24▲24	15▲11	51▲51	42▲40	66	14▼-27	1▼-1
LV	32▲31	13▼-12	1▼-19	26▲13	30▲13	29▲13	57	1▼-1	2▼-10
LT	47▼-2	18▲13	14▲6	17▲13	29▲27	32▲27	46	13▲13	11▼-30
LU	25▲14	8▼-2	0=	55▲9	15▼-13	46▼-19	18	18▼-8	4▲4
HU	25▲25	53▲34	13▲13	1▲1	28▲27	15▼-21	34	15▼-12	12▼-6
MT	20▼-22	55▲28	14▲14	20▲20	0=	0=	2	14▲14	9▼-33
NL	31▲20	1▼-14	7▼-19	17▲7	18▼-5	16▲1	42	17▼-6	15▼-2
AT	23=	25▲5	2▼-5	31▲3	38▲8	46▲13	7	4▼-10	7▲2
PL	35▲21	3▼-45	0▼-58	2▼-16	2▼-14	15▲6	33	0▼-8	32▲32
PT	9▼-1	53▲25	5▼-17	40▼-1	39▲1	35▼-1	5	0▼-5	0=
RO	40▲40	37▲37	9▲9	9▼-5	31▼-47	4▼-65	53	8▲4	4▲4
SI	31▲18	3▼-1	4▲4	4▼-3	15▲6	15▼-16	42	27▼-16	0▼-9
SK	22▲21	31▲12	16▲15	15▲15	16▲14	20▲1	58	9▼-49	14▼-6
FI	14▲3	10▲1	1▼-9	12▼-6	9▼-28	15▼-7	68	2▼-21	14▼-2
SE	12▼-7	6▲2	0▼-4	14▲6	22▼-7	16▼-16	59	9▼-29	5▼-15

Flash Eurobarometer 498 - SMEs, green markets and resource efficiency / Fieldwork: 08/11 - 10/12/2021
(%) Base: n=1 150 - SMEs offering green products/services via external support
▼▲ Evolution 2021-2017 (comparison with Flash Eurobarometer 456, Sept. 2017)
Note: * new item, not included in 2017

DX1 Which type of external support does your company get for the production of its green products or services?

Caution should be exercised when interpreting the results due to low base sizes (<100)

	Public funding such as grants, guarantees or loans	Private funding from a bank, an investment company or venture capital fund	Private funding from friends and relatives	Advice or other non-financial assistance from public administration	Advice or other non-financial assistance from private consulting and audit companies	Advice or other non-financial assistance from business associations and clusters	Advice or other non-financial assistance from supply chain partners*	Other	Don't know/No answer
EU27	20▲8	20=	8▼-5	13▼-3	21▼-8	23▼-4	35	12▼-6	11▼-1
UK	9▲9	9▲5	9▲6	20▼-20	16=	23▼-17	59	4▼-13	15▲2
TR	28▼-55	56▲56	1▲1	23▼-59	15▼-3	11▲11	40	9▲9	0=
MK	40▼-60	36▼-14	19▲19	23▲23	21▼-30	22▲22	34	0=	12▲12
ME	0=	2▼-84	0▼-43	12▲12	38▲38	10▼-4	12	62▲62	0=
RS	37▲37	18▼-7	27▲27	30▲2	17▼-11	30▲2	20	0▼-72	3▲3
AL	35▲35	3▲3	0=	3▲3	39▲39	22▲22	61	3▲3	0=
IS	21▲19	10▲4	11▲11	10▼-4	13▲7	30▲15	35	6▲1	0▼-60
NO	21▼-25	42▲26	11▲11	32▲15	26▲9	44▲7	32	13▼-12	8▲7
MD	0▼-2	8▲8	0▼-48	31▲31	0▼-45	31▲26	31	8▲8	54▲54
US	9▼-12	20▼-4	5▼-10	18▼-26	15▼-30	31▼-32	53	5▲2	16▼-2

Flash Eurobarometer 498 - SMEs, green markets and resource efficiency / Fieldwork: 08/11 - 10/12/2021
(%) Base: n=329 - SMEs offering green products/services via external support
▼▲ Evolution 2021-2017 (comparison with Flash Eurobarometer 456, Sept. 2017)
Note: * new item, not included in 2017

DX2 How satisfied or dissatisfied are you with the level of public support for your green products or services?

Caution should be exercised when interpreting the results due to low base sizes (<50)

	Very satisfied	Fairly satisfied	Fairly dissatisfied	Very dissatisfied	Don't know/No answer
EU27	9▲4	63▲5	16▼-9	5▼-1	8▲2
BE	1▲1	59▼-10	2▼-3	36▲31	1▼-19
BG	0=	1▲1	38▲38	61▼-39	0=
CZ	1▲1	81▲75	18▼-74	0=	0▼-2
DK	8▲8	12▼-67	0=	0=	79▲58
DE	3▼-6	51▼-9	39▲24	7=	0▼-8
EE	0=	91▼-2	0=	4▲4	4▼-2
IE	40▲3	15▼-35	21▲7	0=	25▲25
EL	50▲50	44▼-56	6▲5	0=	0=
ES	26▲26	49▼-51	18▲18	7▲7	0=
FR	2▲2	52▼-8	0▼-40	0=	46▲46
HR	0=	49▼-3	51▲4	0=	0=
IT	0=	98▲34	2▼-34	0=	0=
CY	0=	75▲7	21▲21	4▼-28	0=
LV	19▲19	11▲8	40▼-57	30▲30	0=
LT	4▲4	60▲54	32▼-58	2▲2	2▼-3
LU	16▲16	77▲19	8▼-34	0=	0▼-1
HU	1▲1	52▲52	24▼-76	22▲22	2▲2
MT	0▼-51	51▲5	49▲47	0=	0=
NL	17▲17	58▼-29	15▲2	1▲1	9▲9
AT	6▼-9	50▲7	34▲1	1▲1	10=
PL	1▲1	95▲82	3▼-53	1▼-31	1▲1
PT	1▲1	95▲73	3▲1	0=	1▼-75
RO	0▼-100	13▲13	77▲77	7▲7	3▲3
SI	1▲1	82▲30	15▼-30	0=	1▼-2
SK	0=	34▲6	54▼-17	12▲12	0=
FI	8▲8	38▼-38	16▲16	36▲36	3▼-21
SE	0=	80▲61	17▼-42	1▼-20	2▲2

Flash Eurobarometer 498 - SMEs, green markets and resource efficiency / Fieldwork: 08/11 - 10/12/2021
(%) Base: n=432 - SMEs offering green products/services via public support
▼▲ Evolution 2021-2017 (comparison with Flash Eurobarometer 456, Sept. 2017)

DX2 How satisfied or dissatisfied are you with the level of public support for your green products or services?

Caution should be exercised when interpreting the results due to low base sizes (<50)

	Very satisfied	Fairly satisfied	Fairly dissatisfied	Very dissatisfied	Don't know/No answer
EU27	9▲4	63▲5	16▼-9	5▼-1	8▲2
UK	18▲18	76▲16	4▼-17	0=	3▼-17
TR	58▲58	39▼-61	3▲3	0=	0=
MK	8▲8	59▲9	33▲33	0▼-50	0=
ME	0=	100▲100	0=	0=	0=
RS	3▲3	49▲49	25▲25	24▼-76	0=
AL	0=	100▲100	0=	0=	0=
IS	56▼-36	43▲43	0▼-8	1▲1	0=
NO	53▲53	45▼-42	1▲1	1▲1	0▼-14
MD	0=	0▼-100	100▲100	0=	0=
US	18=	50▼-20	19▲7	12▲12	1▲1

Flash Eurobarometer 498 - SMEs, green markets and resource efficiency / Fieldwork: 08/11 - 10/12/2021
(%) Base: n=110 - SMEs offering green products/services via public support
▼▲ Evolution 2021-2017 (comparison with Flash Eurobarometer 456, Sept. 2017)

DX3 What type of support would help you the most to expand your range of green products or services?

	Financial incentives for developing products, services or new production processes	Assistance with identifying potential markets or customers	Technical support and consultancy for the development of products, services and production processes	Consultancy services for marketing or distribution	Other	None	Don't know/No answer
EU27	43▼-2	27▼-2	28▲3	22▼-2	3▲1	13▼-1	6▲2
BE	28=	29▼-6	34▲12	32▲7	5▲4	11▼-10	7=
BG	55▲11	21▼-7	12▲6	25▼-11	4▲3	11▼-13	7▲7
CZ	32▼-11	25▲13	30▲1	24▼-1	3▲1	17▼-6	0=
DK	26▼-11	19▼-22	26▼-3	17▼-9	2▲1	21▲3	13▲11
DE	39=	28▼-5	30▲6	22▼-15	3▲3	20▲8	1▼-1
EE	43▲2	19▼-12	23▲10	23▲4	6▲2	16▼-8	6▼-1
IE	44▲2	32▼-14	22▼-8	18=	2▲1	6▼-1	15▲9
EL	59▼-6	43▲7	33▲2	23▼-4	0=	2▼-1	1▲1
ES	57▲12	43▲19	41▲16	21▲4	0=	5▼-12	2▼-2
FR	25▼-12	22▼-9	31▲2	19▼-8	3▲2	16▼-1	10▲7
HR	64▲1	10▼-5	33▲1	20▲2	4▲3	4▼-4	3▲1
IT	47▼-11	18▼-8	14▲4	25▲3	5=	11▲2	12▲4
CY	70=	34▲25	27▼-2	30▲22	0▼-7	5▼-3	2▼-4
LV	48▲15	24=	17▼-14	25▼-1	0▼-2	14▼-7	4▲2
LT	58▲19	21▲8	24▼-11	17▼-1	2▼-1	14▼-2	1▼-4
LU	37▼-19	29▲1	32▼-2	33▲18	2▲2	8▼-5	5▲5
HU	44▼-9	15▼-3	14▼-14	28▼-1	2▼-2	17▲8	9▲9
MT	47▼-5	20▲2	26▼-2	32▲9	7▲4	18▼-1	0=
NL	35▼-5	22▼-9	26▼-3	25▲1	1=	23▲13	6▲2
AT	42▲1	30▼-7	27▲6	25▼-9	1=	17▲2	5▼-1
PL	52▼-11	22▼-2	31▲3	13▼-2	1=	14▼-2	6▲4
PT	35▼-11	25▲3	27▼-11	24▲9	5▲1	10▼-8	1▼-3
RO	61▲8	31▼-8	24▲2	40▲21	2▲2	8▼-7	1▲1
SI	65▼-1	22▼-6	19▼-15	17▲3	4▲2	7▼-2	2▲2
SK	60▲31	31▲2	26▲15	21▲10	1▼-2	11▼-11	1▼-10
FI	46▲8	27▼-6	28▲4	20▼-11	2=	14▲1	0▼-2
SE	36▼-1	29▼-2	36▼-1	19▲2	1▼-1	17▲1	1=

Flash Eurobarometer 498 - SMEs, green markets and resource efficiency / Fieldwork: 08/11 - 10/12/2021
(%) Base: n=4 537 - SMEs offering green products or services
▼▲ Evolution 2021-2017 (comparison with Flash Eurobarometer 456, Sept. 2017)

DX3 What type of support would help you the most to expand your range of green products or services?

	Financial incentives for developing products, services or new production processes	Assistance with identifying potential markets or customers	Technical support and consultancy for the development of products, services and production processes	Consultancy services for marketing or distribution	Other	None	Don't know/No answer
EU27	43▼-2	27▼-2	28▲3	22▼-2	3▲1	13▼-1	6▲2
UK	35▼-2	30▲9	33▲8	18▼-1	0▼-2	17▼-5	6▼-2
TR	41▲7	34▲20	45▲8	15▼-35	0=	9▲1	4▼-4
MK	68▲10	18▲15	17▼-37	22=	4▲4	3=	0=
ME	89=	27▲10	11▼-19	7▼-10	0=	0=	0=
RS	65▲7	46▲31	22▲6	10▼-12	1=	8▲2	0=
AL	55▲46	17▲17	27▲6	4▲3	1▼-9	20▼-33	20▲12
IS	48▲10	21▼-7	27▼-17	21▲5	0=	28▲26	0▼-17
NO	53▲4	23▲3	28▲8	23▲6	3▲1	11▼-7	6▲2
MD	59▲18	25▼-20	43▲16	34▲3	0▼-10	0=	10▲10
US	41▼-12	34▼-4	34▲6	16▼-16	1▲1	12▲9	4=

Flash Eurobarometer 498 - SMEs, green markets and resource efficiency / Fieldwork: 08/11 - 10/12/2021
(%) Base: n=1 139 - SMEs offering green products or services
▼▲ Evolution 2021-2017 (comparison with Flash Eurobarometer 456, Sept. 2017)
Note: * new item, not included in 2017

Caution should be exercised when interpreting the results of Albania, Moldova and Montenegro, due to the smaller number of interviews having been conducted in these countries.

DX4 What type of support would help you the most to launch your range of green products or services?

	Financial incentives for developing products, services or new production processes	Assistance with identifying potential markets or customers	Technical support and consultancy for the development of products, services and production processes	Consultancy services for marketing or distribution	Other	None	Don't know/No answer
EU27	31▲3	18▲1	19▲1	14▲1	2=	39▼-3	4=
BE	28▲5	24▲9	31▲15	13▼-5	1=	32▼-14	2▼-3
BG	31▼-1	12▲4	15▲5	14▼-6	1▼-1	33▼-3	9▲1
CZ	26▲6	17▲4	17=	15▲5	2▲2	45▼-9	4▲3
DK	19=	13▼-5	14▼-1	7▼-2	2▼-1	49▼-5	8▼-1
DE	23▲2	22▲3	18▲5	18▲5	2▲1	44▼-7	3=
EE	29▲21	20▲16	10▲7	11▲6	1▲1	48▼-35	2=
IE	42▲8	22▲4	22▲1	22▲5	5▲5	17▼-14	4▼-9
EL	51▲7	29▲11	30▲7	23▲4	0▼-1	18▼-11	1=
ES	44▲21	31▲1	28▼-3	10▼-5	1▲1	26▼-8	4▲1
FR	20▼-14	19▼-4	12▼-15	16▼-5	2=	47▲16	4▲1
HR	48▲17	10▼-4	18▲1	11▼-2	2▼-2	30▼-8	3▼-3
IT	27▲5	7▼-1	13▲7	9▲6	4=	53▼-5	4▼-2
CY	48▲23	19▲6	17▲4	12▼-1	0▼-5	36▼-15	2▼-2
LV	46▲18	19▲7	17▲3	15▲6	1▼-1	27▼-20	0▼-6
LT	41▲15	19▲9	20▲9	14▲3	1▼-1	31▼-15	1▼-4
LU	22▲3	21▼-1	23▲10	13▲2	8▼-1	43▲4	2▼-2
HU	40▲13	12▲7	22▲10	13▲2	1▼-1	37▼-18	3▲1
MT	17▲5	4▲1	14▲6	8▲3	3▲1	62▼-9	11▲1
NL	13▼-11	16=	17▼-3	17▲6	0▼-2	47▲2	6▲1
AT	34▼-5	19▼-6	16▼-3	27▲4	2=	37▲3	3=
PL	33▼-17	10▼-11	17▼-6	13=	2▼-1	43▲16	5▲4
PT	40▲14	18=	27▲2	13▲1	5▲5	17▼-22	7▲1
RO	54▲18	28▲13	31▲7	29▼-4	0▼-2	14▼-12	2▼-1
SI	42▼-3	14=	20▼-5	11▼-3	2=	39▲3	0▼-2
SK	39▲8	26▲9	23▲10	13▲3	2▲1	29▼-5	4▼-5
FI	34▲3	13=	20▼-4	10▼-9	2=	36▲2	5▲1
SE	33▲14	26▲7	25=	14▲2	0=	31▼-11	4▼-1

Flash Eurobarometer 498 - SMEs, green markets and resource efficiency / Fieldwork: 08/11 - 10/12/2021
(%) Base: n=8 210 - SMEs not offering green products or services
▼▲ Evolution 2021-2017 (comparison with Flash Eurobarometer 456, Sept. 2017)

DX4 What type of support would help you the most to launch your range of green products or services?

	Financial incentives for developing products, services or new production processes	Assistance with identifying potential markets or customers	Technical support and consultancy for the development of products, services and production processes	Consultancy services for marketing or distribution	Other	None	Don't know/No answer
EU27	31▲3	18▲1	19▲1	14▲1	2=	39▼-3	4=
UK	38▲15	17▲2	22▲13	17▲11	1▼-2	38▼-13	3▼-8
TR	43▼-13	27▼-8	26▼-7	22▲4	0=	25▲17	3▼-4
MK	46▲3	11▲4	18▼-1	20▼-4	1▲1	18▼-17	7▲4
ME	46▲14	32▲12	16=	17▲6	0▼-3	19▼-4	6▼-10
RS	48▲17	27▲7	18▲16	15▲11	1▼-4	23▼-19	5▼-4
AL	42▲42	9▼-3	9▲9	22▲19	4=	40▼-38	0▼-3
IS	28▼-13	12▲1	33▲13	15▼-4	1▲1	38▲25	1▼-23
NO	43▲22	11▼-1	23▲11	23▲14	0▼-2	26▼-22	6▼-3
MD	46▲6	48▲32	22▼-11	38▲19	0▼-4	8▲1	0▼-5
US	40▲4	14▼-9	16▼-11	7▼-6	1▲1	38▲14	5▼-5

Flash Eurobarometer 498 - SMEs, green markets and resource efficiency / Fieldwork: 08/11 - 10/12/2021
(%) Base: n=1 913 - SMEs not offering green products or services
▼▲ Evolution 2021-2017 (comparison with Flash Eurobarometer 456, Sept. 2017)
Note: * new item, not included in 2017

Caution should be exercised when interpreting the results of Albania, Moldova and Montenegro, due to the smaller number of interviews having been conducted in these countries.

DX5 In your company, how many of your full time employees, including yourself, work in green jobs some or all of the time?

	0 employees	1-5 employees	6-9 employees	10-50 employees	51-100 employees	101+ employees	Don't know/No answer
EU27	58▲4	33▼-2	3=	1▼-2	0=	0=	5=
BE	71▲12	24▼-5	2=	1▼-1	0=	0=	4▼-6
BG	59▼-3	31▲14	3▲1	2▼-1	0=	0=	5▼-11
CZ	58▼-11	36▲20	2▲1	1=	0▼-1	0=	3▼-7
DK	63▼-5	28▲3	1▼-2	2▼-2	0=	0=	6▲5
DE	65▲11	24▼-4	4▼-1	3=	0=	0=	4▼-5
EE	71▼-11	22▲9	1=	1▲1	0=	0=	5▲1
IE	54▲6	24▼-1	2▼-3	3▼-2	0=	0▼-1	16=
EL	61▲11	32▼-2	6▼-1	0▼-4	0▼-1	0=	1▼-2
ES	58▲12	37▼-4	3=	1▼-4	0=	0=	2▼-4
FR	66▼-2	19▼-6	5▲2	1=	0=	0=	8▲6
HR	45▲11	42▼-11	7▲5	2▼-1	0=	0=	3▼-5
IT	45▲3	49▼-2	1▼-1	1▼-3	0=	0=	4▲3
CY	74▼-6	24▲12	1▼-1	1▼-3	0=	0=	0▼-3
LV	43▲17	46▼-8	3▼-4	2▼-4	0=	0=	7▼-2
LT	63▼-15	29▲15	4▲2	1▼-2	0=	0=	3▼-1
LU	51▼-7	38▲6	1=	2▼-5	0=	0=	9▲5
HU	69=	21▲6	3=	0▼-2	0=	0=	7▼-3
MT	80▼-14	17▲11	1▲1	0=	0=	0=	1▲1
NL	60▲1	30▲1	3=	1▼-2	0=	0=	6=
AT	56▲6	31▼-1	1▼-2	2▼-2	0▼-1	0=	10=
PL	61▲7	26▼-6	3▲2	1▼-2	0▼-1	0=	9=
PT	51▲5	35▼-9	3▲1	2▼-1	0=	0=	8▲4
RO	49▼-7	35▲9	4▲1	4▼-1	0=	0=	7▼-2
SI	56▼-15	39▲15	3▲2	1▲1	0=	0=	1▼-3
SK	35▼-1	58▲9	4▼-1	1▼-1	0=	0=	2▼-6
FI	55▲12	37▼-12	4▲3	2=	0=	0=	3▼-2
SE	52▲14	37▼-11	5▲1	1▼-2	0=	0=	5▼-2

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(%) Base: n=13 343 - All SMEs
▼▲ Evolution 2021-2017 (comparison with Flash Eurobarometer 456, Sept. 2017)

DX5 In your company, how many of your full time employees, including yourself, work in green jobs some or all of the time?

	0 employees	1-5 employees	6-9 employees	10-50 employees	51-100 employees	101+ employees	Don't know/No answer
EU27	58▲4	33▼-2	3=	1▼-2	0=	0=	5=
UK	65▲2	25▲2	5▲4	1=	0=	0=	4▼-7
TR	74▼-16	14▲8	5▲5	2=	0▼-1	0=	6▲5
MK	50▼-11	37▲23	3▲3	6▲4	0=	0▼-1	4▼-18
ME	60▲27	30▲2	2=	7▲2	0▼-2	0=	2▼-29
RS	55▲14	37▲7	3▼-2	3▼-4	0=	0=	3▼-14
AL	55▲1	28▼-16	6▲6	2▲2	0=	0=	9▲7
IS	67▲33	27▼-14	3▲1	1▼-4	0=	0=	1▼-16
NO	49▲3	29▼-6	11▲9	3▼-2	0▼-1	0=	8▼-3
MD	10▼-21	50▲3	26▲25	11▲2	1=	0=	3▼-10
US	62▲8	29▼-8	3▲3	2▲1	0=	0=	4▼-4

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(%) Base: n=3 200 - All SMEs
▼▲ Evolution 2021-2017 (comparison with Flash Eurobarometer 456, Sept. 2017)
Note: * new item, not included in 2017

Caution should be exercised when interpreting the results of Albania, Moldova and Montenegro, due to the smaller number of interviews having been conducted in these countries.