European Commission

Flash Eurobarometer 381

SMES, RESOURCE EFFICIENCY AND GREEN MARKETS

SUMMARY

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This survey has been requested by the European Commission, Directorate-General for Enterprise and Industry and co-ordinated by the Directorate-General for Communication.

Flash Eurobarometer 381 - TNS Political & Social

Eurobarometer

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SMEs, resource efficiency and green markets

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

Survey co-ordinated by the European Commission,
Directorate-General for Communication
(DG COMM "Strategy, Corporate Communication Actions and
Eurobarometer" Unit)

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INTRODUCTION

Small and medium sized enterprises (SMEs)[1] are the economic backbone of the European Union. These 20.7 million companies represent more than 98% of all European businesses and provide 67% of total employment[2,3]. SME's contributions are also essential for pursuing the goals of 'Europe 2020', the strategy for smart, sustainable and inclusive growth[4].

The European Commission promotes the growth of SMEs through the Small Business Act for Europe[5]. This framework includes an initiative to raise SMEs' awareness of environmental and energy-related issues and to assist them in implementing legislation, assessing their environmental and energy performance and upgrading their skills and qualifications.

This survey follows on from Eurobarometer FL342 in 2012 by reviewing the current state of the presence in green market and the resource efficiency actions amongst Europe's SMEs, as well those in neighbouring countries and in the US. Topics covered include:

- Compliance with environmental legislation
- Current and future resource efficiency actions
- Barriers to resource efficiency
- The role and impact of policy in supporting green business initiatives
- The current state of the green market

The results are analysed at EU28 level, national level, and also by company characteristics. Where possible the trend since the last report will be discussed. In 2012, Croatia was not a member of the European Union so any comparisons made at EU level in terms of trend will be compared with the EU-27 average.

In some countries the sample sizes collected include less than 400 businesses and therefore the results of the survey for these countries need to be interpreted accordingly. In some cases, national level analysis is not carried out when the base size is too small.

Throughout the report, the size of SMEs will be defined as the following: micro enterprises (1-9 employees), small enterprises (10-49 employees) and medium-sized enterprises (50-249 employees).

[1] Small and medium-sized enterprises are defined as those with a staff headcount below 250. In addition to the staff headcount ceiling, an enterprise qualifies as an SME if it meets either the turnover ceiling or the balance sheet ceiling, but not necessarily both. Full definition can be found in: http://ec.europa.eu/enterprise/policies/sme/facts-figures-analysis/sme-definition/index_en.htm
[2] http://ec.europa.eu/enterprise/policies/sme/facts-figures-analysis/index_en.htm
[3] http://ec.europa.eu/enterprise/policies/sme/facts-figures-analysis/performance-review/files/supporting-documents/2012/annual-report_en.pdf
[4] http://ec.europa.eu/enterprise/policies/europe2020/index_en.htm
[5] http://ec.europa.eu/enterprise/policies/sme/small-business-act/index_en.htm

This survey was carried out by the TNS Political & Social network in the 28 Member States of the European Union and in Albania, Israel, Iceland, Liechtenstein, Montenegro, Former Yugoslav republic of Macedonia, Norway, Republic of Serbia, Turkey and the United States between the 9th and 27th of September 2013. This survey covers 13,509 businesses in total, with 11,207 in the EU, employing fewer than 250 employees in the manufacturing (NACE category C), services (NACE categories G/H/I/J/K/L/M/N) and industry sector (NACE categories D/E/F). The sample was selected from an international database, with additional sample from local sources where necessary.

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

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

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

ABBREVIATIONS			
BE	Belgium	LT	Lithuania
BG	Bulgaria	LU	Luxembourg
CZ	Czech Republic	HU	Hungary
DK	Denmark	MT	Malta
DE	Germany	NL	The Netherlands
EE	Estonia	AT	Austria
EL	Greece	PL	Poland
ES	Spain	PT	Portugal
FR	France	RO	Romania
HR	Croatia	SI	Slovenia
IE	Ireland	SK	Slovakia
IT	Italy	FI	Finland
CY	Republic of Cyprus*	SE	Sweden
LV	Latvia	UK	The United Kingdom
AL	Albania	EU28	European Union – 28 Member States
IL	Israel		
IS	Iceland	EU15	BE, IT, FR, DE, LU, NL, DK, UK, IE, PT, ES, EL, AT, SE, FI**
LI	Liechtenstein	NMS13	BG, CZ, EE, CY, LV, LT, MT, HU, PL, RO, SI, SK, HR***
ME	Montenegro		
MK	Former Yugoslav republic of Macedonia****		
NO	Norway		
RS	Republic of Serbia		
TR	Turkey		
US	USA		

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

** EU15 refers to the 15 countries forming the European Union before the enlargements of 2004, 2007 and 2013.

*** The NMS13 are the 12 ‘new Member States’ which joined the European Union during the 2004 and 2007 enlargements and Croatia which joined the EU in 2013.

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

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We wish to thank all the people who have given their time to take part in this survey. Without their active participation, this study would not have been possible.

I. ATTITUDES TOWARDS THE ENVIRONMENT

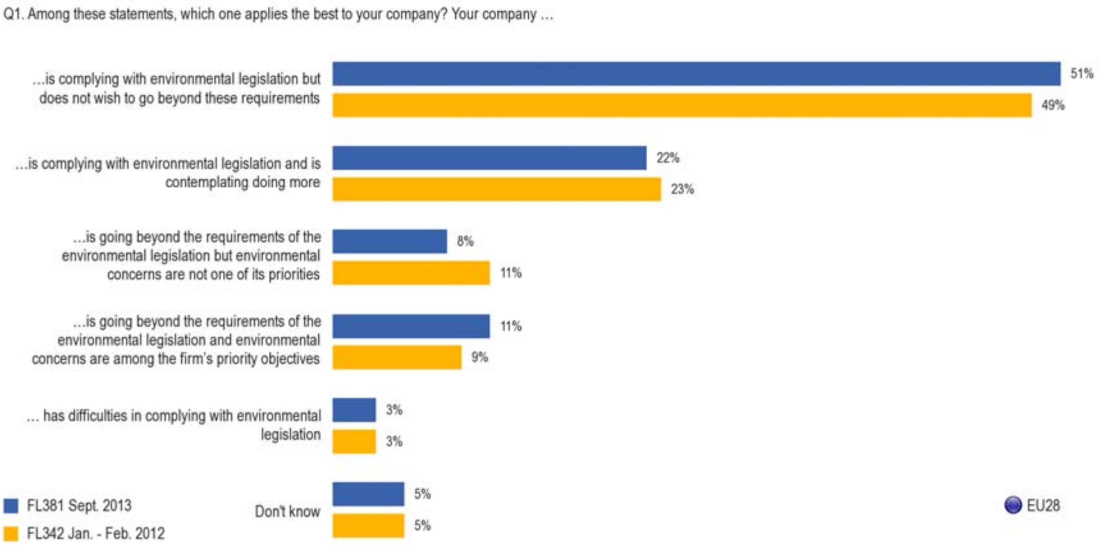
This introductory section of the report considers the current attitudes towards environmental legislation in the EU.

- Almost all EU SMEs report they comply with environmental legislation -

Almost all (92%) SMEs in the EU say they comply with environmental legislation. Most SMEs (51%) do not wish to go beyond their regulatory requirements in this area, while 22% are contemplating doing more than currently required. Overall 19% of SMEs are doing more than required in terms of environmental legislation: 11% do so because environmental concerns are part of their company’s priority objectives, while 8% say that although doing more than required, environmental concerns are not a priority for their company.

Only a small proportion of SMEs (3%) say that compliance with environmental legislation is a problem for their business.

There has been little change since the last wave of the survey in 2012.



Base: All SMEs = 11,207

Micro and small enterprises are more likely to say that they are complying with environmental legislation, but do not wish to go beyond these requirements. More than half (53%) of those with 1-9 employees say this, compared to 47% of those with 10-49 employees, and 34% of those with 50-249.

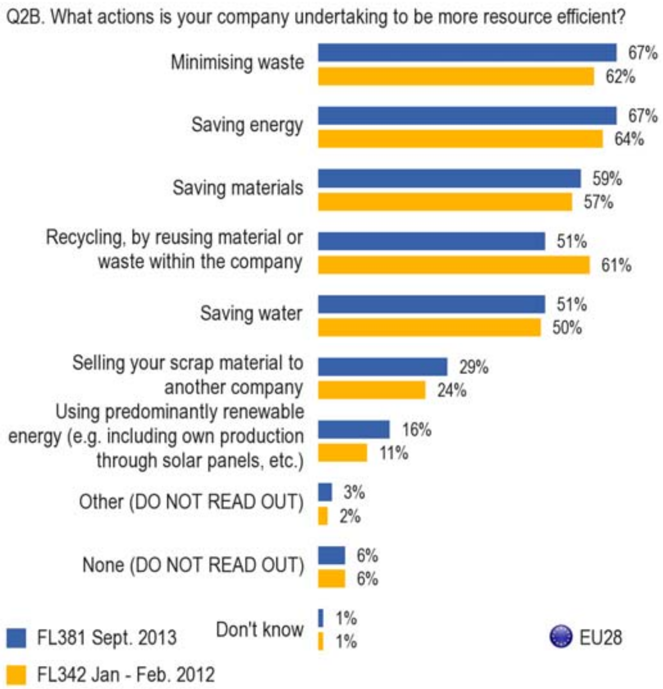
It is noteworthy that more than one in ten (13%) SMEs in US are unable to answer the question compared with 5% of EU SMEs.

II. USING RESOURCES BETTER: WHO, HOW AND HOW MUCH

2.1. Actions to promote resource efficiency: present and future

- Minimising waste and saving energy are the most common resource efficiency actions -

93% of SMEs are taking at least one action to be more resource efficient, with the most common actions being to minimise waste, save energy (both 67%) and save materials (59%). At least half are also recycling by reusing material or waste within the company, or by saving water (both 51%).



Split B = 5,497

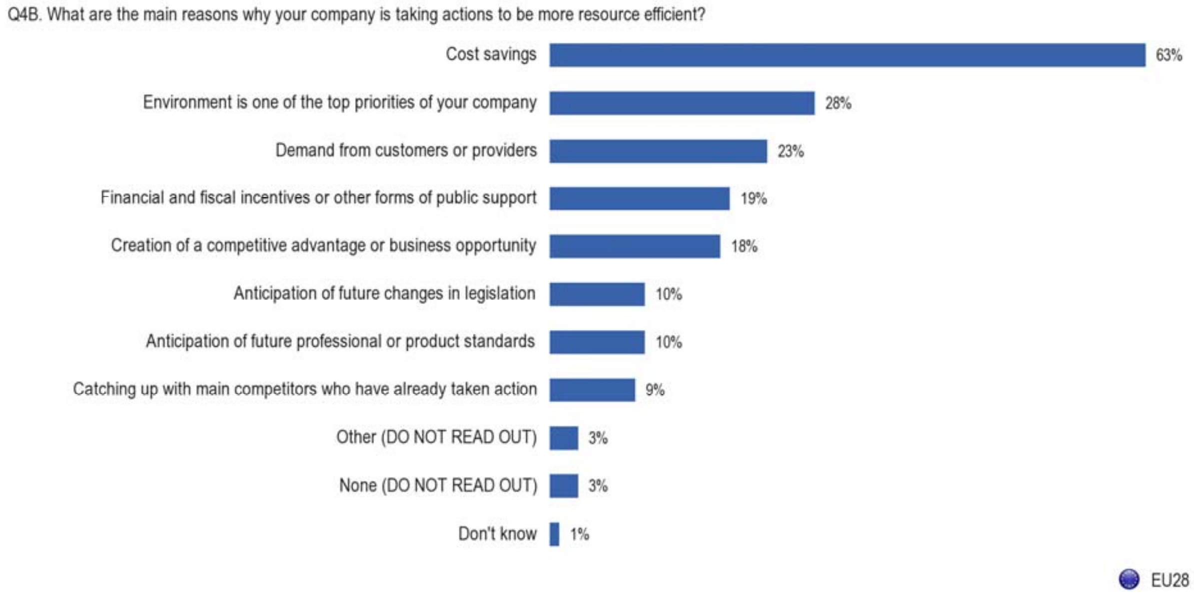
SMEs with 50-249 employees are the most likely to be taking each kind of action, particularly saving energy (80% vs. 65%-69%).

Eight out of ten SMEs are planning additional resource efficiency actions in the next two years, particularly saving energy (58%) and minimising waste (56%). Almost half (49%) plan to save materials, while 43% will save water and 41% will recycle within the company.

Country results show that SMEs in the US are more likely than their EU counterparts to already be taking many of the resource efficiency actions listed (56% vs. 35%). The same pattern applies for additional actions planned in the next two years, with SMEs in the US more likely to be planning to take additional actions in all of the areas studied compared to their EU counterparts (58% vs. 33%).Around one in twenty (6%) SMEs in the EU say they are not taking any of these resource efficiency measures, compared to just 1% of US SMEs.

- The majority of SMEs in the EU act to become more efficient to reduce costs -

The majority of SMEs in the EU act to become more resource efficient in order to reduce costs (63%), although 28% say the environment is one of the top priorities for their company.



Base: Split B, SMEs that are taking at least one resource efficiency action = 5,107

The larger the SME, the more likely they are to say their actions are as a result of consumer or provider demand.

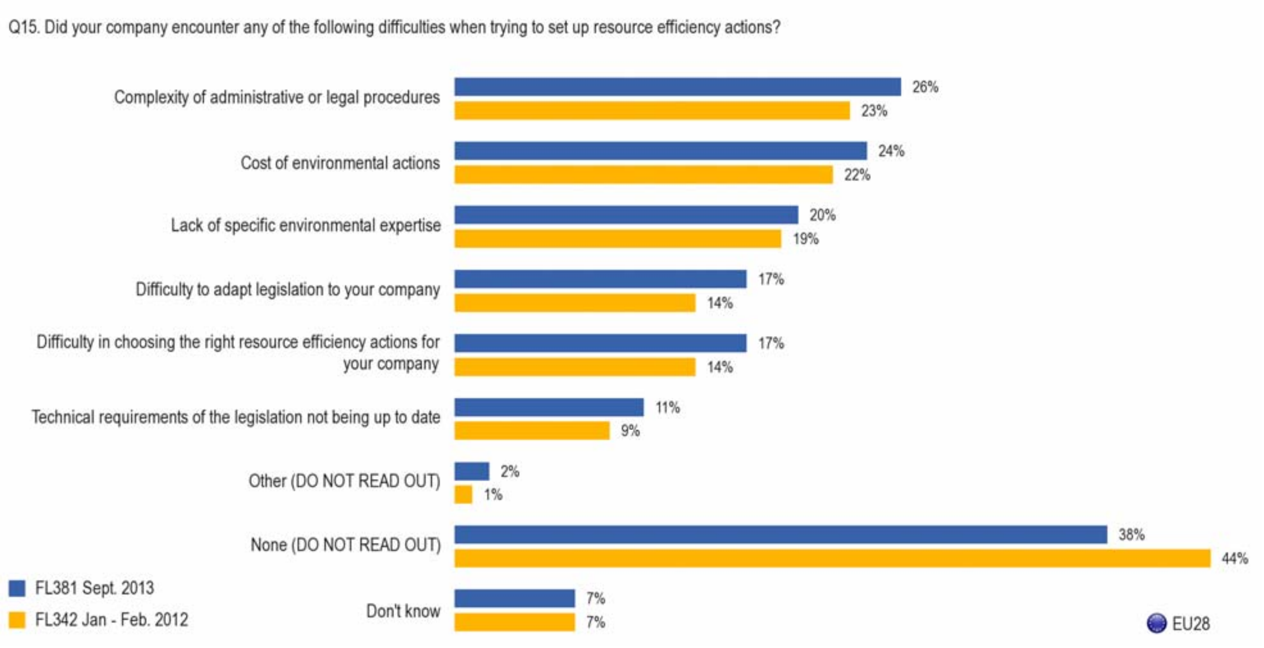
Medium-sized enterprises are the most likely to say actions to be more resource efficient are because the environment is a company priority (36% vs. 26%-27%). They are also the most likely to say these actions have been taken to create a competitive advantage or business opportunity (28% vs. 17%-19%).

Manufacturing companies are the most likely to be taking resource efficiency actions to save costs (68% vs. 60%-63%). Along with industry sector companies they are also slightly more likely to be taking these actions as a result of demand from customers/providers (25% and 28% vs. 20%-21%), or to create a competitive advantage 23% and 21% vs. 16%-17%).

SMEs in the US are more likely than their EU counterparts to be taking resource efficiency actions because the environment is one of their company's top priorities (40% vs. 28% in the EU).

- Four in ten SMEs have not experienced any difficulty when trying to set up resource efficiency actions -

Four in ten SMEs do not experience any difficulties when they try to set up resource efficiency (38%). However, complex legal or administrative procedures (26%) and the cost of environmental actions (24%) continue to be the most common difficulties for SMEs.



Base: SMEs that are taking at least one resource efficiency action = 10,511

Medium-sized enterprises, and those in manufacturing and industry are the most likely to have encountered difficulties with the complexity of legal or administrative procedures

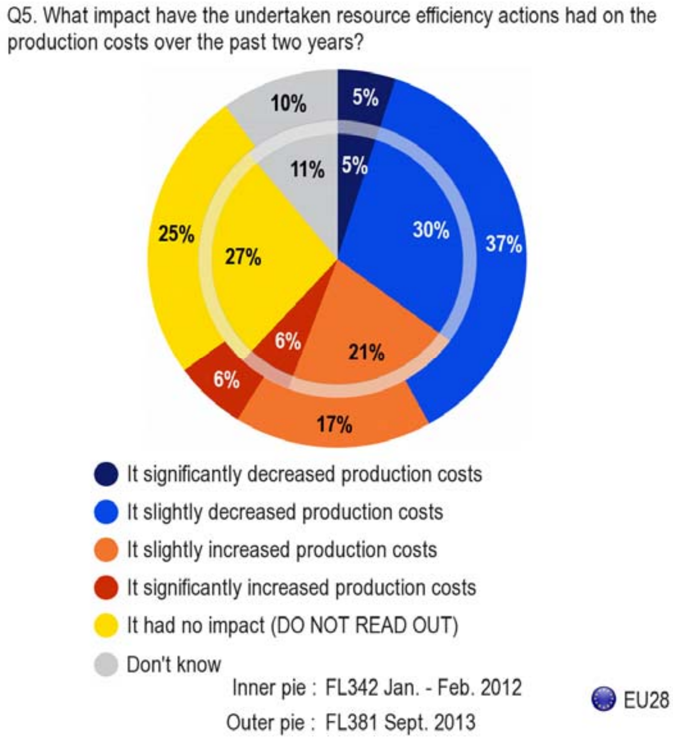
SMEs with at least 10 employees are more likely to mention the cost of actions as a difficulty (29% and 28% vs. 22%), while small enterprises (10-49 employees) are the most likely to have encountered difficulty in choosing the right actions for their company (20% vs. 16%-17%).

Across the EU SMEs in 18 countries are most likely to say they have encountered **complex administrative or legal procedures** when trying to set up resource efficiency actions. SMEs and the Czech Republic and Slovakia (both 39%), Belgium (38%) and Greece (37%) are the most likely to mention this difficulty. SME's in 10 EU countries are most likely to mention encountering difficulties with the **cost of environmental actions**. This is particularly the case for those in Spain (34%), Portugal (31%) and Malta (30%).

Whilst SMEs in the US are less likely to experience difficulties in general when setting up resource efficiency actions (43% vs. 38%), they are more likely than EU SMEs to say that they have a lack of specific environmental expertise (29% vs. 20%), their technical requirements are not up to date (18% vs. 11%) and they have trouble choosing the right resource efficiency actions (21% vs. 17%)

2.2. Does it pay to be "clean and green"?

- Four in ten SMEs say resource efficient actions have reduced their production costs in the past two years –



Base: SMEs that are taking at least one resource efficiency action = 10,511

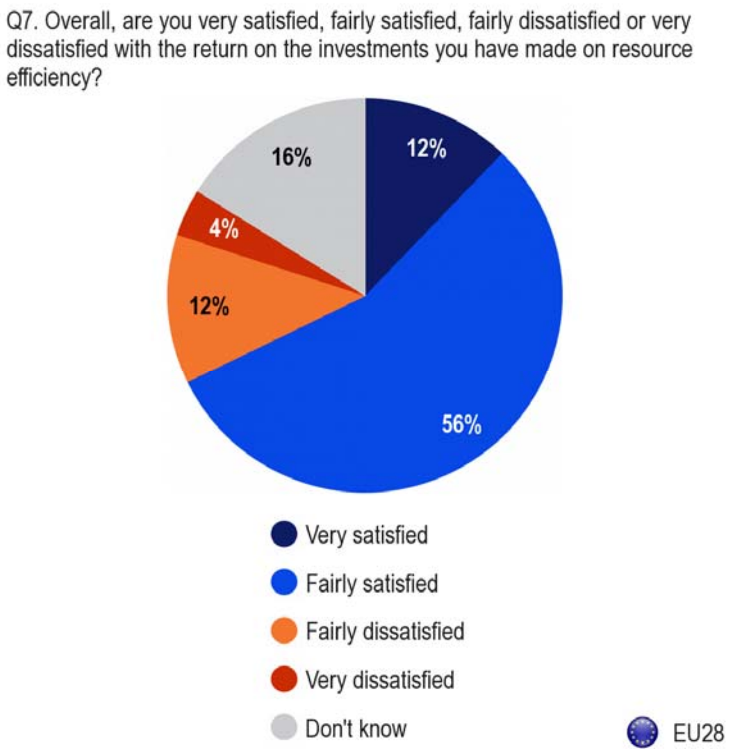
42% of SMEs taking resource efficiency actions say their production costs have decreased in the past two years as a result – this is an increase of seven percentage points compared to 2012.

Medium-sized enterprises are the most likely to say that resource efficiency actions have decreased production costs (54% vs. 14%-44%). On the other hand micro enterprises are the most likely to say that their changes have had no impact on production costs (27%), particularly compared to medium-sized enterprises (13%).

The country results show only a small difference between the EU and the US, with 39% and 42% respectively saying their resource efficiency actions had decreased production costs. SMEs in the US are slightly more likely to say these actions have increased production costs (29% vs. 23%).

- A majority of SMEs are satisfied with the return on their resource efficiency investments –

More than two thirds of SMEs are satisfied with the return they have received on their investments in resource efficiency (68%), with 12% saying they are 'very satisfied'. Overall 16% do not have an opinion, with 12% 'fairly dissatisfied' and 4% 'very dissatisfied'.



Base: SMEs that are taking at least one resource efficiency action = 10,511

2.3. Do policies help companies to become resource efficient?

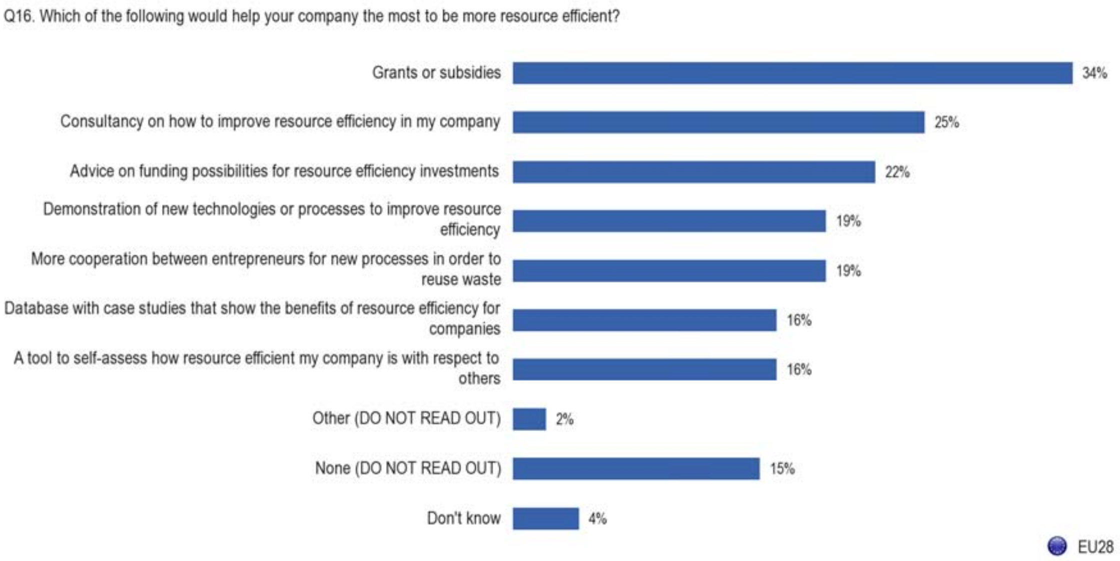
Most EU SMEs use their own internal resources when trying to be more resource efficient: 60% use their own financial resources and 53% their own technical expertise. 19% rely on external support.

External support is much more likely to come from the private rather than the public sector (75% vs. 35%). Advice or non-financial assistance from private companies (43%) and business associations (36%) are the most common forms of external support.

- Grants and subsidies are the most likely to help SMEs be more resource efficient -

SMEs are most likely to say that grants and subsidies would help make their company more resource efficient (34%). One quarter mention consultancy on improving resource efficiency (25%), while 22% would like advice on funding possibilities for resource efficiency investments.

Just under one in five say that demonstrations of new resource efficiency processes or technology, or more cooperation between entrepreneurs for new waste reduction processes would most assist their company (both 19%). A case study database showing company benefits is mentioned by 16%, as is a self-assessment tool to gauge the company's resource efficiency compared to others.



Base: All SMEs = 11,207

SMEs with 50-249 employees are more likely than micro and small enterprises to mention grants and subsidies (40% vs. 33%-35%), and demonstrations of new technologies or processes (27% vs. 18%-23%).

Manufacturing and industry SMEs are the most likely to mention grants or subsidies (40% and 37% vs. 32%-33%).

Manufacturing companies are also more likely than those in other sectors to mention funding advice for resource efficiency investments (27% vs. 19%-22%).

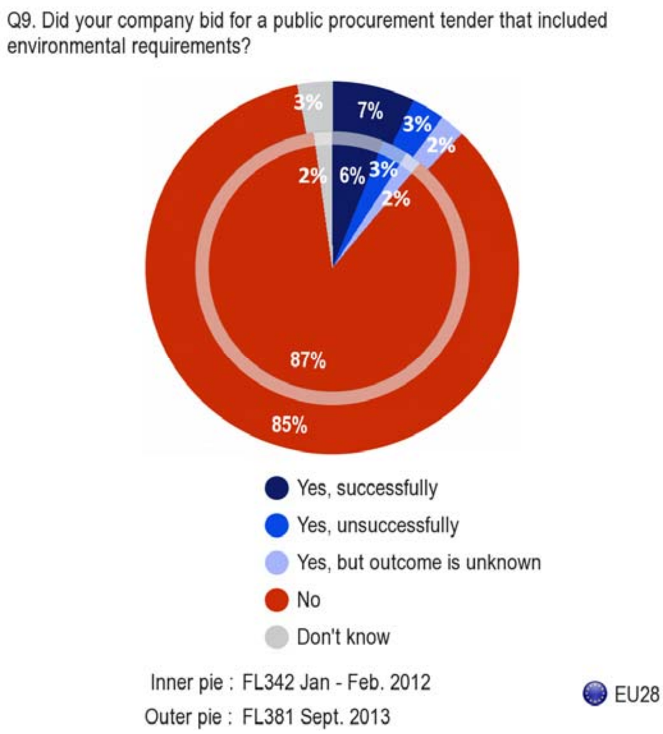
Industry SMEs are the most likely to say they would benefit from more cooperation between entrepreneurs for new waste reduction processes, particularly compared to services sector SMEs (24% vs. 16%).

Country analysis highlights differences between SMEs in the EU and the US. Companies in the US are much more likely to say demonstration of new technologies or processes to improve resource efficiency would be most helpful (36% vs. 19%), as would a self-assessment tool (28% vs. 16%).

2.4. Identifying the barriers of applying for public tenders with environmental requirements

- Only a small proportion of SMEs participate in green public procurement tenders -

Just 12% of SMEs have bid for a public procurement tender that included environmental requirements, with 7% successful in their bid.



Base: All SMEs = 11,207

The larger the SME, the more likely it is to have been successful (19% vs. 5%-9% of micro and small enterprises). Industry SMEs are the most likely to have bid, and bid successfully for this kind of tender.

One in five (21%) companies that bid for a public tender with environmental requirements experienced difficulties. Too much paperwork to be submitted is the most common difficulty (39%), followed by costs (19%).

The most common reason for not bidding on a public procurement tender with environmental requirements is that SMEs have never been confronted with such a tender (55%). However, 14% did not even attempt a bid as they assumed it was too complicated while 9% mention too much paperwork and 8% mention high costs.

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

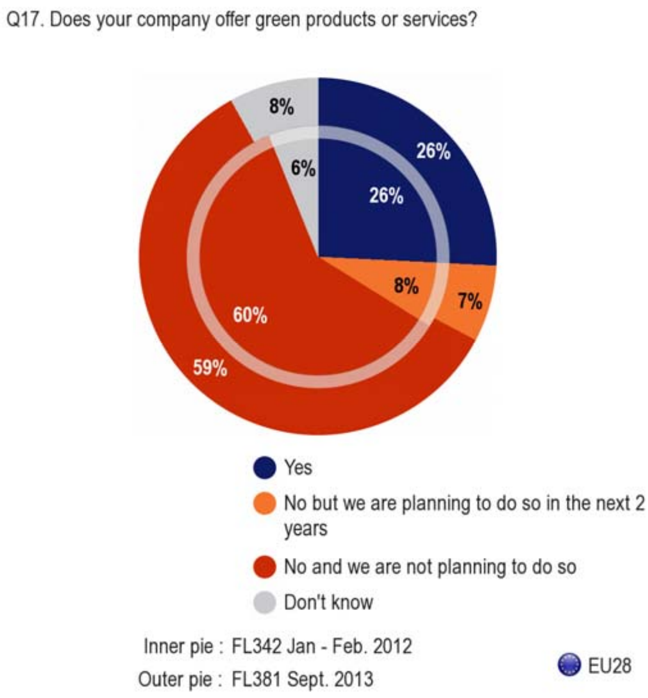
3.1. Green markets: Profiles of SMEs offering green products or services

Green products and services are those with a predominant function of reducing environmental risk and minimise pollution and resources. This may also include products with environmental features (e.g. organically produced, eco-labelled, with an important recycled content, eco-designed…).

- One quarter of SMEs offer green products or services –

Just over one quarter (26%) of SMEs in the EU offer green products of services, with a further 7% planning to do so in the next two years. However, the majority of SMEs do not offer green products or services, and have no plans to do so (59%).

Overall the picture has not changed since 2012, when the results were very similar.



Base: All SMEs = 11,207

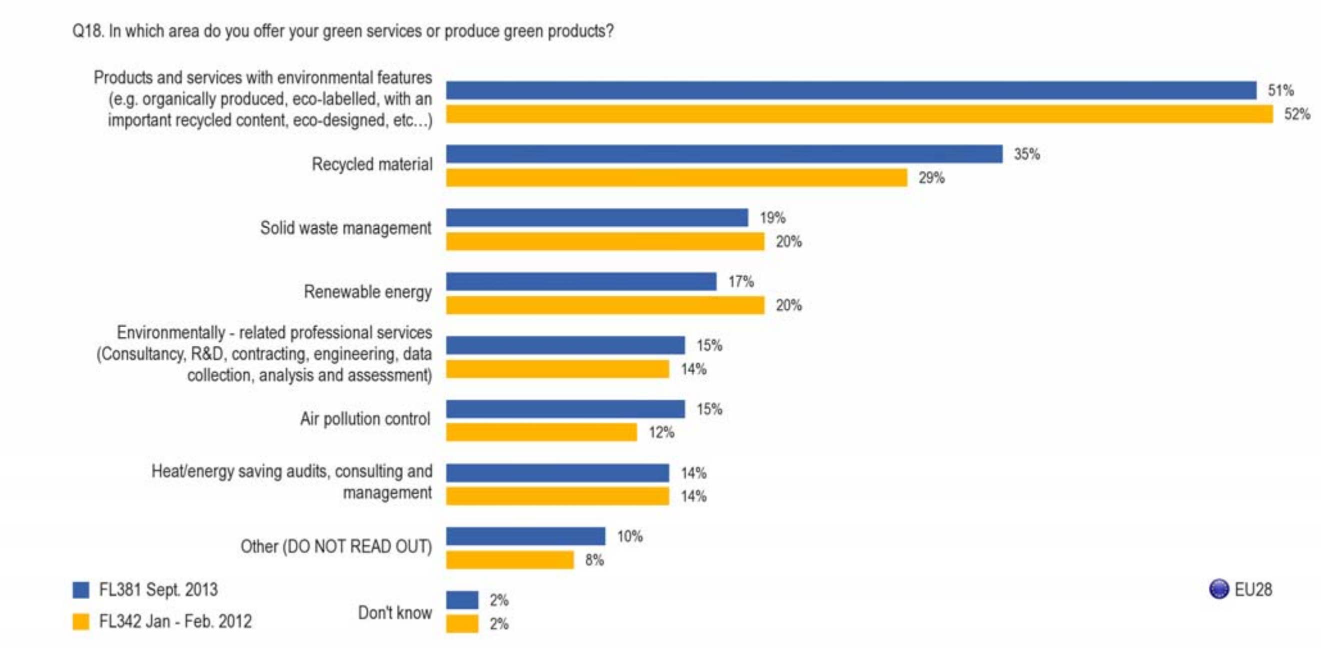
The larger the SME, the more likely they are to offer green products or services. One third (33%) of SMEs with 50-249 employees offer green products and services, compared to 29% of those with 10-49 and 25% of those with 1-9 employees.

Industry sector SMEs are much more likely than those in other sectors to be offering green products or services. More than one third (37%) do this, compared to 28% of those in retail, 26% in manufacturing and 21% in the services sector. The majority of

SMEs in the services (66%), manufacturing (61%) and retail (54%) sectors do not offer green products or services, and have no plans to do so.

SMEs in the US are more likely than their EU counterparts to be offering green products or services (34% vs. 26%). They are also more likely to be planning to offer such services or products in the next two years (12% vs. 7% for EU SMEs).

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

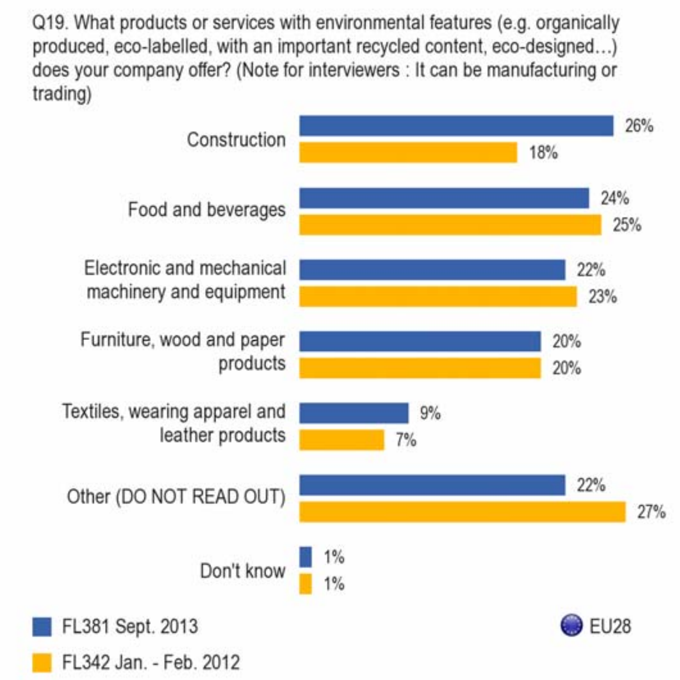


Base: SMEs that offer green products or services = 2,977

SMEs in the US are more likely than their EU counterparts to be offering recycled material (60% vs. 35%).

- Construction, food and beverages, and electronic and mechanical machinery and equipment are the most commonly sold green products and services -

Just over one quarter of SMEs in the EU that offer services or products with environmental features do so in the construction area (26%). Almost one quarter sell food and beverages (24%), while 22% sell electronic and mechanical machinery and equipment. One fifth of SMEs offer furniture, wood and paper products (20%) while 9% offer textiles, wearing apparel and leather products.



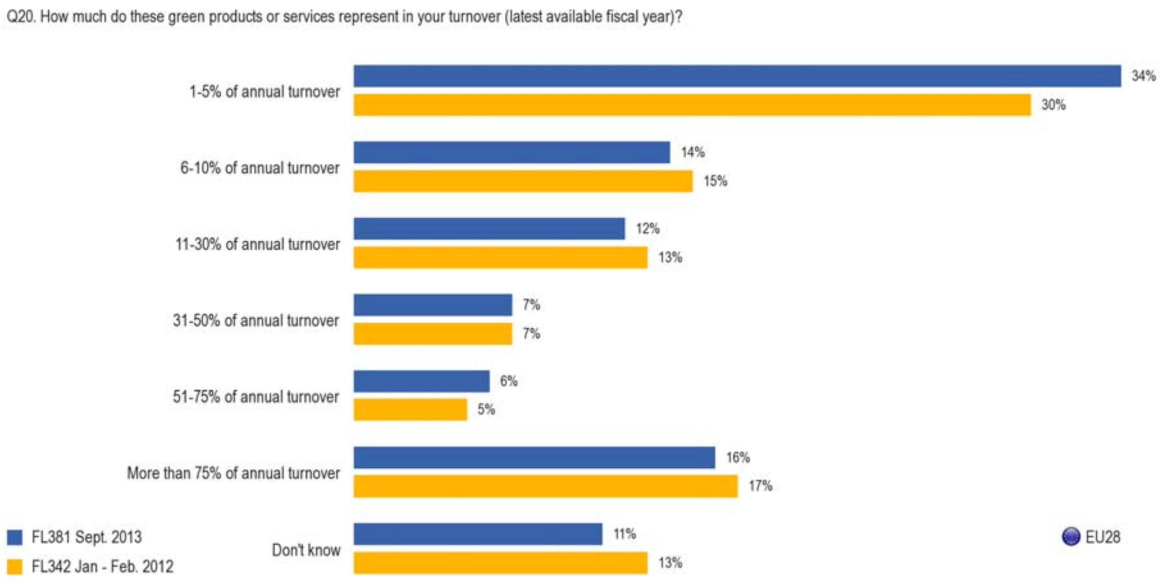
Base: SMEs that offer products or services with environmental features = 1,527

SMEs are now much more likely to be offering construction materials or services with environmental features than they were in 2012 (+8 percentage points). There has been little change in the proportion of SMEs offering products or services with environmental features in the other areas.

- For most SMEs offering them, green products or services represented 30% or less of their turnover –

SMEs that offer green products and services are most likely to report they represent between 30% or less of their turnover (60%). In fact, for 34% of ‘green’ SMEs these green products or services represent 1-5% of their annual turnover. It is worth noting that there is a sizeable proportion of SMEs in this category who make at least 75% of their turnover from selling green products or services (16%), similar to the proportion who make 6-10% or 11-30% of their turnover (14% and 12% respectively) out of the same products and services.

The trend from the last survey shows that turnover attributed to green products and services has declined, with more companies now saying 1-5% of their annual turnover comes from green products or services (+4 percentage points).



Base: SMEs that offer green products or services = 2,977

US based SMEs selling green products or services are more likely than their EU counterparts to say that 10% or less of their turnover is generated by these items (62% vs. 48%). In fact almost three in ten EU SMEs say at least 31% of annual turnover is generated by green products and services (29%), compared to 18% of those in the US.

- Most SMEs have been selling green products of services for more than three years -

SMEs that sell green products or services are most likely to have been doing so for at least three years (69%). Almost one quarter has been selling these products or services for between one and three years (23%), while 6% have been doing so for the last 12 months.

Compared to the previous wave, SMEs have been selling green products and services for longer, with an eight percentage point increase in the proportion selling for more than three years, a six point decrease in those selling for one to three years, and a two point decrease in those selling for 12 months.

SMEs in the EU have been selling green products or services for longer than their US counterparts. Almost seven out of ten (69%) EU SMEs have been selling these products or services for more than three years, compared to 57% of those in the US. At the other end, 12% of US SMEs have been selling these products for the last 12 months compared to only 6% in the EU.

- The national market is the main market majority of SMEs selling green products or services-

At least nine out of ten SMEs selling green products or services say their own country is their main market in terms of annual turnover (91%). Almost one in five (19%) say their main market is the EU and /or Iceland, Liechtenstein, Norway and Switzerland. Only 7% say that their main market is outside of Europe. Additionally, from the SMEs that export to another EU country, one quarter (24%) also export to country outside of the EU[7].

Base: SMEs that offer green products or services = 2,977

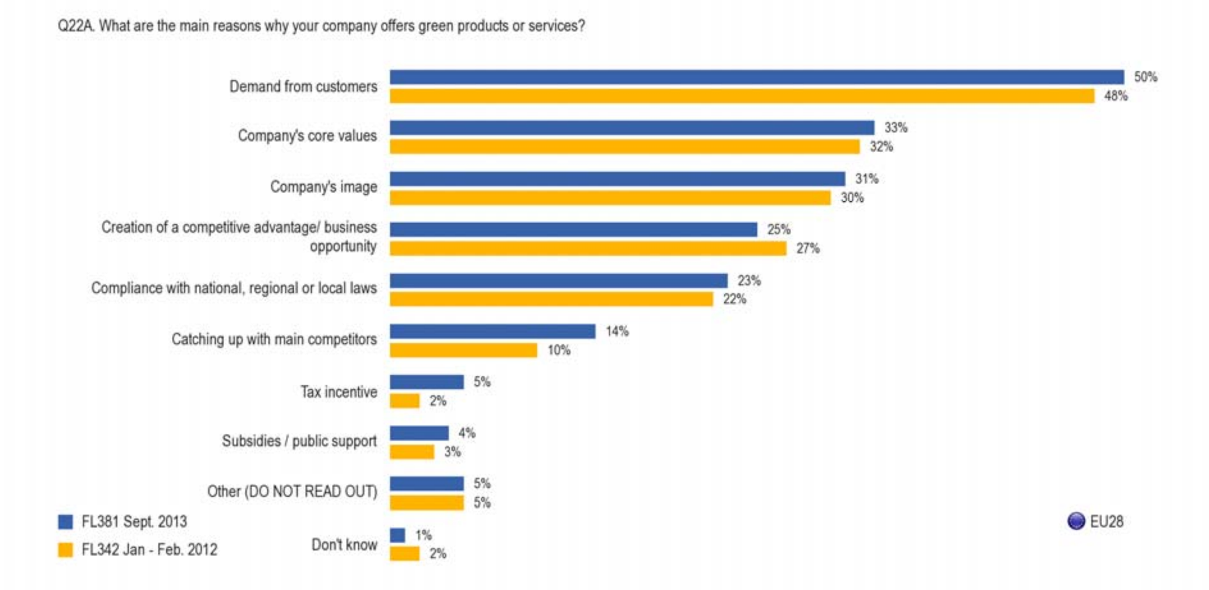
Country level analysis shows that SMEs in the US are even more likely than those in the EU to say their national market is their main market (99% vs. 91%).

[7] Out of the 2977 SMEs that were asked this question, 552 said that their main market was in the EU whereas 132 SMEs said that their markets were in the EU and in another country.

3.2. Why do SMEs sell green products or services?

- Customer demand is the most common driver behind SMEs offering green products or services -

SMEs are most likely to be offering green products or services due to customer demand (50%). One third offer them as a result of the company’s core values (33%), while 31% do so because of the company’s image. One quarter offer green products or services to create a competitive advantage or business opportunity, whilst 23% do so to comply with national, regional or local laws. At least one in ten (14%) are trying to catch up with their main competitors. It should be noted that tax incentives (5%) and subsidies (4%) are not seen by SMEs as relevant reasons to sell green products and services.



Base: SMEs that offer green products or services = 2,977

- Insufficient customer demand is the main reason companies do not offer green products of services -

One quarter of companies not offering green products or services say this is due to insufficient customer demand (25%). At least one in five say that green products or services do not fit or are not important for their company’s image (22%) while 20% say this about the company’s core values. Just under one in five (17%) say green products or services would not create a competitive advantage, and 12% say these things are not relevant in catching up to competitors. Around one in ten cite insufficient public support (11%) or the fact that selling these products or services is not necessary for compliance with laws (8%).

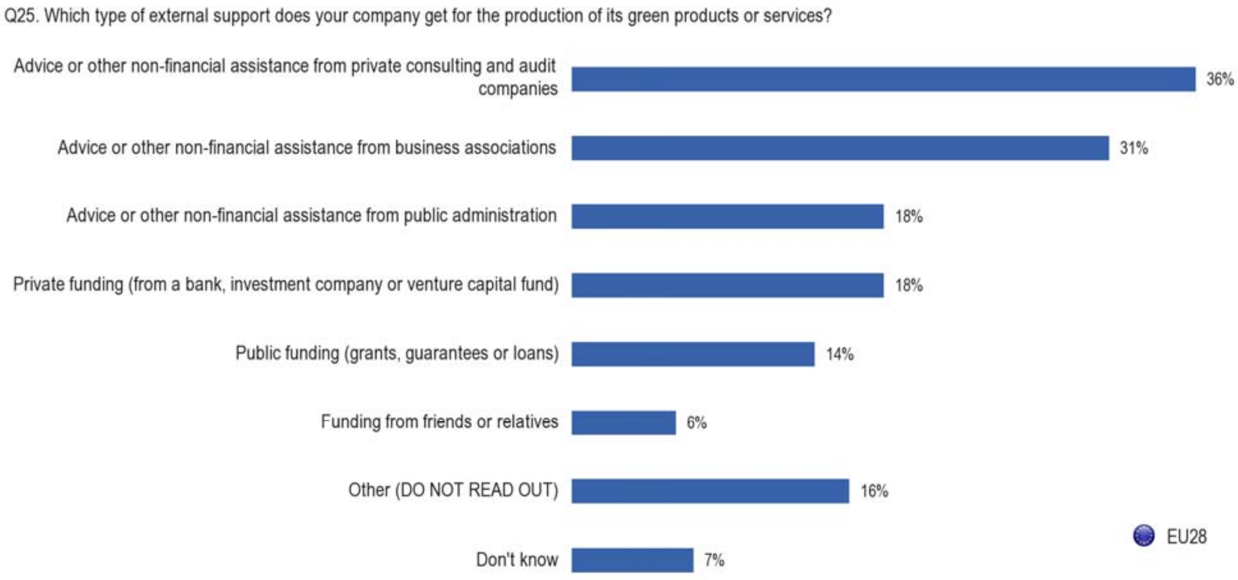
SMEs in the EU are more likely than their US counterparts to be selling green products or services as a result of customer demand (50% vs. 38%). US SMEs, on the other hand, are more likely to be doing so as a result of the company’s core values (47% vs. 33%), or in order to create a competitive advantage (36% vs. 25%).

3.3. Do policies help SMEs to offer green products or services?

Most SMEs that sell green products or services rely on their own financial resources (58%) and/or technical expertise (55%) for production. Just over one in five (22%) rely on external support.

- SMEs who rely on external support are most likely to get this in the form of non-financial assistance –

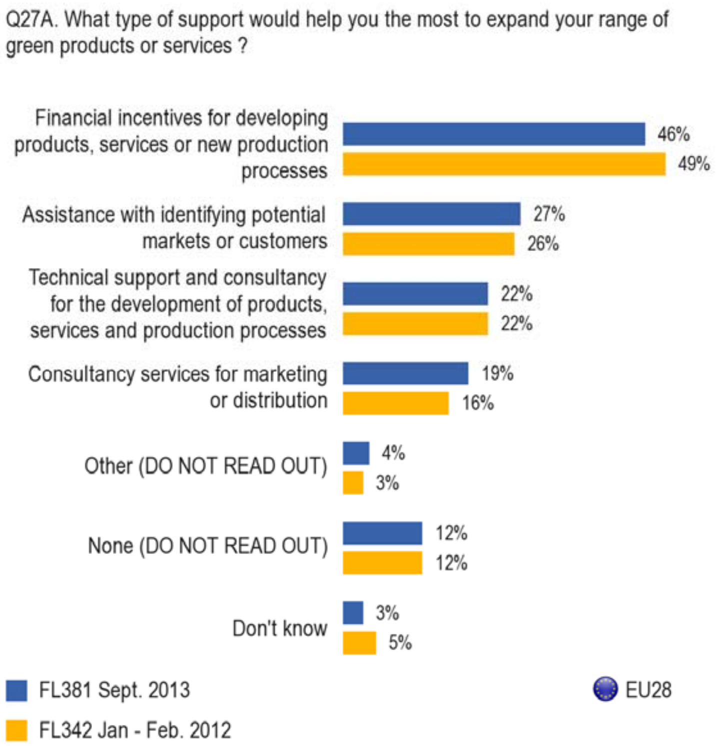
More than one third of SMEs who rely on external support for production of green products or services receive advice or non-financial support from private companies (36%). Just over three in ten receive advice or non-financial assistance from business associations (31%) while 18% receive this kind of assistance from public administration. External support from private funding is received by 18%, while 14% receive public funding and 6% receive funding from friends or relatives.



Base: SMEs that rely on external support for the production of their green products or services = 650

- Financial incentives would be the most helpful in expanding green product or service offerings -

Companies that sell green products or services were asked the kind of support that would be most helpful to them to expand their green offering. Almost half (46%) mention financial incentives for new product, services or production process development. Financial incentives are much more likely to be mentioned than assistance with identifying potential markets or customers (27%), technical support or consultancy for new product, services or production process development (22%) or consultancy for marketing or distribution (19%).



Base: SMEs that offer green products or services = 2,977

There have only been minor changes since the last wave in 2012. SMEs selling green products or services are now slightly less likely to mention financial incentives (-3 percentage points), but more likely to mention consultancy services for marketing or distribution (+3 points).

Cross-country comparison highlights the differences between SMEs in the US and the EU that offer green products or services. EU SMEs are more likely to mention financial incentives (46% vs. 42%), while those in the US are more likely to mention assistance identifying markets or customers (39% vs. 27%), technical support (29% vs. 22%) or marketing or distribution consultancy (24% vs. 19%).

Companies that do not currently offer green products or services were asked what kind of support would most help them launch a range of green products or services. Financial incentives for developing new products, services or production processes are the most mentioned kind of support (29%), followed by assistance identifying potential customers or markets (17%), technical support and consultancy for developing new products, services or production processes (16%) and marketing or distribution consultancy (12%). However, more than one third (37%) said none of these options would help.

Base: SMEs that do not offer green products or services = 7,341

There have only been slight changes since the previous wave, with SMEs less likely to mention financial incentives (-2 percentage points), and more likely to mention technical support or marketing or distribution consultancy (both +2 points). SMEs are also more likely to mention 'none' (+5 points).

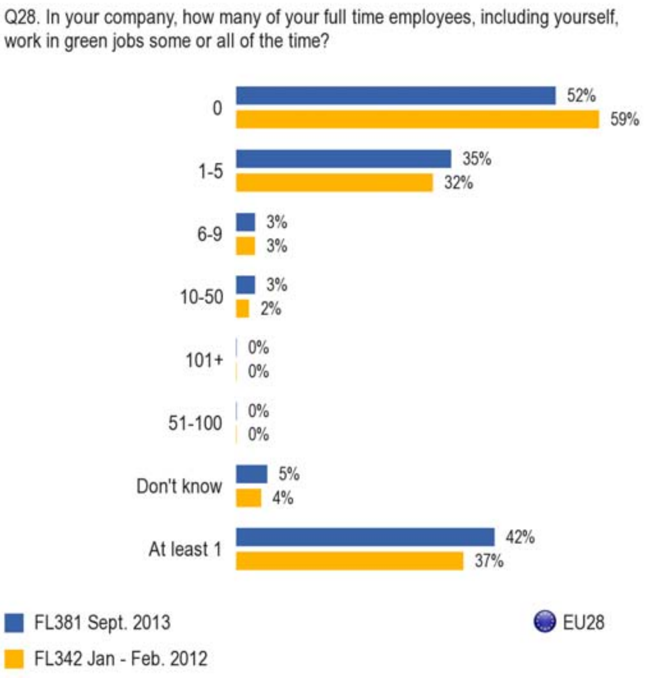
SMEs in all but two EU countries are most likely to say that **financial incentives** would help them the most to launch their own green products or services. Companies in Greece (48%) are the most likely to say this, followed by those in Poland (43%), Bulgaria, Croatia and the UK (all 38%).

3.4. Green employment in the SME sector

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

- Four out of ten SMEs have at least one full time employee working in a green job –

A slight majority of SMEs have no full time employees working in green jobs at least some of the time (52%). Just over one third (35%) have 1-5 full time employees in green roles, while 6% have 6 or more. Overall at least four in ten have at least one full time employee working in a green job (42%).



Base: All SMEs = 11,207

The proportion of SMEs employing at least one full time person in a green job has increased by five percentage points since the last wave, while the proportion of companies employing 1-5 has increased by three points.

Having at least one green employee is not necessarily related to compliance with environmental legislation. For example 51% of companies that have trouble complying have at least one green employee, compared with 35% of those that comply but go no further.

The more resource efficiency actions a company is undertaking, the more likely it is to have at least one full time employee in a green job: 54% of those taking many actions have at least one green employee, compared to 16% of those taking no actions. The same pattern applies for those planning to take additional resource efficiency actions.

Companies that offer green products or services are the most likely to have at least one green employee (74%) followed by those that are planning to offer such products or services (42%). In comparison 29% of companies with no plans to offer green products or services have at least one employee in a green job. SMEs offering green products or services also have the highest average number of green employees (4.6 vs. 1.1-2.0).

FLASH EUROBAROMETER 381
“SMEs, Resource Efficiency and Green Markets”
TECHNICAL SPECIFICATIONS

Between the 9th and the 27th of September 2013, TNS Political & Social, a consortium created between TNS political & social, TNS UK and TNS opinion, carried out the survey FLASH EUROBAROMETER 381 about “SMEs, resource efficiency and green markets”.

This survey has been requested by the EUROPEAN COMMISSION, Directorate-General for Enterprise and Industry. It is a business to business survey co-ordinated by the Directorate-General for Communication (“Strategy, Corporate Communication Actions and Eurobarometer” Unit). The FLASH EUROBAROMETER 381 covers small and medium-sized enterprises in the Manufacturing (Nace category C), Retail (Nace category G), Services (Nace category I, J, K, H, L, M), and Industry (Nace category B, D, E, F) sectors in all 28 European Union Member States. It was also carried out in Turkey, the Former Yugoslav Republic of Macedonia, Iceland, Norway, Serbia, Israel, Albania, Montenegro, Liechtenstein and the US where the same target group was interviewed. Whenever a company was eligible the selected respondent had to be a general manager, a financial director or a significant owner. All interviews were carried using the TNS e-Call center (our centralized CATI system). The sample was selected from an international business database, with some additional sample from local sources in countries where necessary.

Quotas were applied on both company size (using three different ranges: 1-9 employees, 10-49 employees, 50-249 employees) and sectors (Retail, Services, Manufacturing and Industry). These quotas were adjusted according to the country’s universe but were also reasoned in order to ensure that the sample was large enough in every cell. This approach is consistent across all countries.

Readers are reminded that survey results are estimations, the accuracy of which, everything being equal, rests upon the sample size and upon the observed percentage. With samples of about 1,000 interviews, the real percentages vary within the following confidence limits:

Statistical Margins due to the sampling process
(at the 95% level of confidence)

various sample sizes are in rows *various observed results are in columns*

	5% 95%	10% 90%	15% 85%	20% 80%	25% 75%	30% 70%	35% 65%	40% 60%	45% 55%	50% 50%	
N=50	6,0	8,3	9,9	11,1	12,0	12,7	13,2	13,6	13,8	13,9	N=50
N=500	1,9	2,6	3,1	3,5	3,8	4,0	4,2	4,3	4,4	4,4	N=500
N=1000	1,4	1,9	2,2	2,5	2,7	2,8	3,0	3,0	3,1	3,1	N=1000
N=1500	1,1	1,5	1,8	2,0	2,2	2,3	2,4	2,5	2,5	2,5	N=1500
N=2000	1,0	1,3	1,6	1,8	1,9	2,0	2,1	2,1	2,2	2,2	N=2000
N=3000	0,8	1,1	1,3	1,4	1,5	1,6	1,7	1,8	1,8	1,8	N=3000
N=4000	0,7	0,9	1,1	1,2	1,3	1,4	1,5	1,5	1,5	1,5	N=4000
N=5000	0,6	0,8	1,0	1,1	1,2	1,3	1,3	1,4	1,4	1,4	N=5000
N=6000	0,6	0,8	0,9	1,0	1,1	1,2	1,2	1,2	1,3	1,3	N=6000
N=7000	0,5	0,7	0,8	0,9	1,0	1,1	1,1	1,1	1,2	1,2	N=7000
N=7500	0,5	0,7	0,8	0,9	1,0	1,0	1,1	1,1	1,1	1,1	N=7500
N=8000	0,5	0,7	0,8	0,9	0,9	1,0	1,0	1,1	1,1	1,1	N=8000
N=9000	0,5	0,6	0,7	0,8	0,9	0,9	1,0	1,0	1,0	1,0	N=9000
N=10000	0,4	0,6	0,7	0,8	0,8	0,9	0,9	1,0	1,0	1,0	N=10000
N=11000	0,4	0,6	0,7	0,7	0,8	0,9	0,9	0,9	0,9	0,9	N=11000
N=12000	0,4	0,5	0,6	0,7	0,8	0,8	0,9	0,9	0,9	0,9	N=12000
N=13000	0,4	0,5	0,6	0,7	0,7	0,8	0,8	0,8	0,9	0,9	N=13000
N=14000	0,4	0,5	0,6	0,7	0,7	0,8	0,8	0,8	0,8	0,8	N=14000
N=15000	0,3	0,5	0,6	0,6	0,7	0,7	0,8	0,8	0,8	0,8	N=15000
	5% 95%	10% 90%	15% 85%	20% 80%	25% 75%	30% 70%	35% 65%	40% 60%	45% 55%	50% 50%	

ABBR.	COUNTRIES	INSTITUTES	N° INTERVIEWS	FIELDWORK DATES		POPULATION OF SMEs
BE	Belgium	TNS Dimarso	400	09/09/2013	27/09/2013	468.652
BG	Bulgaria	TNS BBSS	401	09/09/2013	27/09/2013	279.614
CZ	Czech Rep.	TNS Aisa s.r.o	400	09/09/2013	27/09/2013	920.722
DK	Denmark	TNS Gallup A/S	400	09/09/2013	27/09/2013	190.894
DE	Germany	TNS Infratest	500	09/09/2013	27/09/2013	1.927.013
EE	Estonia	TNS Emor	400	09/09/2013	27/09/2013	48.076
EL	Greece	TNS ICAP	401	09/09/2013	27/09/2013	49.484
ES	Spain	TNS Demoscopia S.A	500	09/09/2013	27/09/2013	2.367.950
FR	France	TNS Sofres	500	09/09/2013	27/09/2013	2.343.372
HR	Croatia	HENDAL	400	09/09/2013	27/09/2013	156.667
IE	Ireland	IMS Millward Brown	400	09/09/2013	27/09/2013	141.717
IT	Italy	TNS ITALIA	500	09/09/2013	27/09/2013	3.688.052
CY	Rep. of Cyprus	CYMAR	200	09/09/2013	27/09/2013	44.164
LV	Latvia	TNS Latvia	400	09/09/2013	27/09/2013	76.655
LT	Lithuania	TNS LT	400	09/09/2013	27/09/2013	108.581
LU	Luxembourg	TNS Dimarso	201	09/09/2013	27/09/2013	26.488
HU	Hungary	TNS Hoffmann Kft	400	09/09/2013	27/09/2013	507.749
MT	Malta	MISCO International Ltd	201	09/09/2013	27/09/2013	43.297
NL	Netherlands	TNS NIPO	400	09/09/2013	27/09/2013	687.791
AT	Austria	TNS Austria	400	09/09/2013	27/09/2013	286.334
PL	Poland	TNS Polska	500	09/09/2013	27/09/2013	1.407.090
PT	Portugal	TNS EUROTESTE	401	09/09/2013	27/09/2013	710.382
RO	Romania	TNS CSOP	402	09/09/2013	27/09/2013	426.134
SI	Slovenia	RM PLUS	400	09/09/2013	27/09/2013	109.188
SK	Slovakia	TNS AISA Slovakia	400	09/09/2013	27/09/2013	386.735
FI	Finland	TNS Gallup Oy	400	09/09/2013	27/09/2013	208.736
SE	Sweden	TNS SIFO	400	09/09/2013	27/09/2013	585.723
UK	United Kingdom	TNS UK	500	09/09/2013	27/09/2013	1.492.015
TOTAL EU28			**11.207**	**09/09/2013**	**27/09/2013**	**19.689.275**
TR	Turkey	TNS PIAR	301	09/09/2013	27/09/2013	57.006
MK	Former Yugoslav Republic of Macedonia	TNS Brima	200	09/09/2013	27/09/2013	31.278
IS	Iceland	Capacent ehf	200	09/09/2013	27/09/2013	948
NO	Norway	TNS Gallup AS	300	09/09/2013	27/09/2013	249.368
RS	Republic of Serbia	TNS Medium Gallup	200	09/09/2013	27/09/2013	49.579
IL	Israel	TNS Teleseker	300	09/09/2013	27/09/2013	145.231
AL	Albania	IDRA	100	09/09/2013	27/09/2013	286
ME	Montenegro	TNS Medium Gallup	101	09/09/2013	27/09/2013	170
LI	Liechtenstein	TNS Austria	100	09/09/2013	27/09/2013	1.070
US	United States	TNS Custom Research	500	09/09/2013	27/09/2013	18.477.363
TOTAL			**13.509**	**09/09/2013**	**27/09/2013**	**19.012.299**