

Flash Eurobarometer 315  
January-February 2011

Attitudes of European Entrepreneurs towards eco-innovation

Basic questionnaire

The GALLUP Organization

FL315

Attitudes of European entrepreneurs towards eco-innovation  
Flash Eurobarometer survey

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

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

[READ OUT – ONLY ONE ANSWER]

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

**D2. What is the annual turnover of your company?**

[READ OUT – ONLY ONE ANSWER]

- up to €2 million ..... 1
- €2-10 million..... 2
- €10-50 million..... 3
- €50 million and over..... 4
- [DK/NA] ..... 9

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

[READ OUT – ONLY ONE ANSWER]

- Increased ..... 1
- Remained unchanged..... 2
- Decreased..... 3
- [DK/NA] ..... 9

**D4. What is the main activity of your company?**

[READ OUT THE MAIN CATEGORIES, THAN CONTINUE WITH THE SUB CATEGORIES]

**Agriculture and fishing**

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

**Construction**

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

**Water supply; sewerage; waste management and remediation activities**

- Water collection, treatment and supply ..... 18
- Sewerage ..... 19
- Remediation activities and other waste management services..... 20

Waste collection, treatment and disposal activities; materials recovery.....	21
<b>Manufacture</b>	
– Manufacture of food/ tobacco products	
Manufacture of food products or beverages .....	22
Manufacture of tobacco products.....	23
Manufacture of paper and paper products.....	24
Manufacture of textiles, wearing apparel, leather and related products .....	25
Manufacture of furniture .....	26
Manufacture of coke and refined petroleum products.....	27
Manufacture of chemicals and chemical products.....	28
Manufacture of basic pharmaceutical products and pharmaceutical preparations	29
Manufacture of rubber and plastic products or other non-metallic mineral products	30
Manufacture of basic metals or fabricated metal products (except machinery and equipment)	31
– Manufacture of machinery and equipment	
Manufacture of machinery and equipment .....	32
Manufacture of transport equipment .....	33
Manufacture of electrical equipment .....	34
Manufacture of computer, electronic and optical products .....	35
Printing and reproduction of recorded media.....	36
<b>Food services</b>	
Restaurants and mobile food service activities .....	37
Event catering and other food services .....	38
Beverage serving activities .....	39

**[ASK ALL]**

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

[READ OUT – ONLY ONE ANSWER]

- Less than 10%.....	1
- Between 10% and 29%.....	2
- Between 30% and 49%.....	3
- 50% or more .....	4
- [Not applicable] .....	8
- [DK/NA] .....	9

**[ASK ALL]**

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

[READ OUT– ONLY ONE ANSWER]

- Increased dramatically .....	1
- Increased moderately.....	2
- Remained unchanged.....	3
- Decreased.....	4
- [Not applicable] .....	8
- [DK/NA] .....	9

**[ASK ALL]**

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

[READ OUT– ONLY ONE ANSWER]

- Yes, material costs will increase .....	1
- No, material costs will remain approximately the same.....	2
- No, material costs will decrease.....	3
- [Not applicable] .....	8
- [DK/NA] .....	9

[ASK ALL]

**Q4. From what regions do most of the materials you use coming / originate from?**

[READ OUT– MULTIPLE ANSWERS POSSIBLE]

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

[ASK ALL]

**Q5. Have you implemented any changes to reduce material costs in the past 5 years?**

[ROTATE - READ OUT- ONE ANSWER PER LINE]

- Mentioned .....1
  - Not mentioned.....2
  - [Not applicable].....8
  - [DK/NA] .....9
- 
- a. Changing business model ..... 1 2 8 9
  - b. Improving the material flow in the supply chain..... 1 2 8 9
  - c. Substituting expensive materials for a cheaper ones ..... 1 2 8 9
  - d. Purchasing more efficient technologies ..... 1 2 8 9
  - e. Developing more efficient technologies in-house..... 1 2 8 9
  - f. Outsourcing production or service activities..... 1 2 8 9
  - g. Recycling ..... 1 2 8 9

[ASK ALL]

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

[READ OUT– ONLY ONE ANSWER]

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

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

[READ OUT– ONE ANSWER PER LINE]

- Yes .....1
  - No .....2
  - [DK/NA] .....9
- 
- a. a new or significantly improved eco-innovative product or service to the market ..... 1 2 9
  - b. a new or significantly improved eco-innovative production process or method ..... 1 2 9
  - c. a new or significantly improved eco-innovative organisational innovation ..... 1 2 9

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

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

[READ OUT- ONLY ONE ANSWER]

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

[ASK ALL]

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

[ROTATE - READ OUT- ONE ANSWER PER LINE]

- Very serious .....	4
- Somewhat serious.....	3
- Not serious.....	2
- Not at all serious .....	1
- [Not applicable].....	8
- [DK/NA] .....	9
a. Lack of funds within enterprise.....	1 2 9
b. Lack of external financing .....	1 2 9
c. Uncertain return on investment or too long payback period for eco-innovation.....	1 2 9
d. Lack of qualified personnel and technological capabilities within the enterprise.....	1 2 9
e. Limited access to external information and knowledge, including lack of well developed technology support services.....	1 2 9
f. Lack of suitable business partners .....	1 2 9
g. Lack of collaboration with research institutes and universities .....	1 2 9
h. Uncertain demand from the market.....	1 2 9
i. Reducing material use is not a innovation priority .....	1 2 9
j. Reducing energy use is not a innovation priority.....	1 2 9
k. Technical and technological lock-ins in economy ☐(e.g. old technical infrastructures) ☐ .....	1 2 9
l. Market dominated by established enterprises .....	1 2 9
m. Existing regulations and structures not providing incentives to eco-innovate.....	1 2 9
n. Insufficient access to existing subsidies and fiscal incentives.....	1 2 9

[ASK ALL]

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

[ROTATE - READ OUT- ONE ANSWER PER LINE]

- Very important.....	4
- Somewhat important.....	3
- Not important .....	2
- Not at all important .....	1
- [Not applicable].....	8

- [DK/NA] .....9

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

Flash EB Series #315

# Attitudes of European entrepreneurs towards eco-innovation

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



Coordinated by Directorate-General  
Communication

This document does not represent the point of  
view of the European Commission.  
The interpretations and opinions contained in it  
are solely those of the authors.

**THE GALLUP ORGANIZATION**

## II. Survey details

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

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

Belgium	BE	Gallup Europe	(Interviews : 24/01/2011 – 01/02/2011)
Czech Republic	CZ	Focus Agency	(Interviews : 24/01/2011 – 01/02/2011)
Denmark	DK	Norstat Denmark	(Interviews : 24/01/2011 – 01/02/2011)
Germany	DE	IFAK	(Interviews : 24/01/2011 – 01/02/2011)
Estonia	EE	Saar Poll	(Interviews : 24/01/2011 – 01/02/2011)
Greece	EL	Metroanalysis	(Interviews : 24/01/2011 – 01/02/2011)
Spain	ES	Gallup Spain	(Interviews : 24/01/2011 – 01/02/2011)
France	FR	Efficiency3	(Interviews : 24/01/2011 – 01/02/2011)
Ireland	IE	Gallup UK	(Interviews : 24/01/2011 – 01/02/2011)
Italy	IT	Demoskopoea	(Interviews : 24/01/2011 – 01/02/2011)
Cyprus	CY	CYMAR	(Interviews : 24/01/2011 – 01/02/2011)
Latvia	LV	Latvian Facts	(Interviews : 24/01/2011 – 01/02/2011)
Lithuania	LT	Baltic Survey	(Interviews : 24/01/2011 – 01/02/2011)
Luxembourg	LU	Gallup Europe	(Interviews : 24/01/2011 – 01/02/2011)
Hungary	HU	Gallup Hungary	(Interviews : 24/01/2011 – 01/02/2011)
Malta	MT	MISCO	(Interviews : 24/01/2011 – 01/02/2011)
Netherlands	NL	MSR	(Interviews : 24/01/2011 – 01/02/2011)
Austria	AT	Spectra	(Interviews : 24/01/2011 – 01/02/2011)
Poland	PL	Gallup Poland	(Interviews : 24/01/2011 – 01/02/2011)
Portugal	PT	Consulmark	(Interviews : 24/01/2011 – 01/02/2011)
Slovenia	SI	Cati d.o.o.	(Interviews : 24/01/2011 – 01/02/2011)
Slovakia	SK	Focus Agency	(Interviews : 24/01/2011 – 01/02/2011)
Finland	FI	Norstat Finland Oy	(Interviews : 24/01/2011 – 01/02/2011)
Sweden	SE	Norstat Sweden	(Interviews : 24/01/2011 – 01/02/2011)
United Kingdom	UK	Gallup UK	(Interviews : 24/01/2011 – 01/02/2011)
Bulgaria	BG	Vitosh Research	(Interviews : 24/01/2011 – 01/02/2011)
Romania	RO	Gallup Romania	(Interviews : 24/01/2011 – 01/02/2011)

### Representativeness of the results

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

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

### Weighting

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



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

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

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

### Sizes of the samples

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

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

### Questionnaires

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

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

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