

# Attitudes of European entrepreneurs towards eco-innovation

## Summary

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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.

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

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**THE GALLUP ORGANIZATION**

## Table of contents

<b>Table of contents</b> .....	<b>3</b>
<b>Introduction</b> .....	<b>4</b>
<b>1. Companies' material costs</b> .....	<b>5</b>
1.1 Material costs as a percentage of “total costs” .....	5
1.2 Changes in companies' material costs.....	6
1.3 Expected changes in material costs .....	7
1.4 Where do companies' materials originate from?.....	8
1.5 Changes implemented to reduce material costs.....	9
<b>2. Eco-innovative activities</b> .....	<b>10</b>
2.1 Share of innovation investments related to eco-innovation.....	10
2.2 Eco-innovations introduced in the past two years .....	11
2.3 Relevance of innovations in terms of resource efficiency .....	12
<b>3. Barriers to an accelerated uptake of eco-innovation</b> .....	<b>13</b>
<b>4. Drivers for an accelerated uptake of eco-innovation</b> .....	<b>16</b>

## Introduction

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

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

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

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

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

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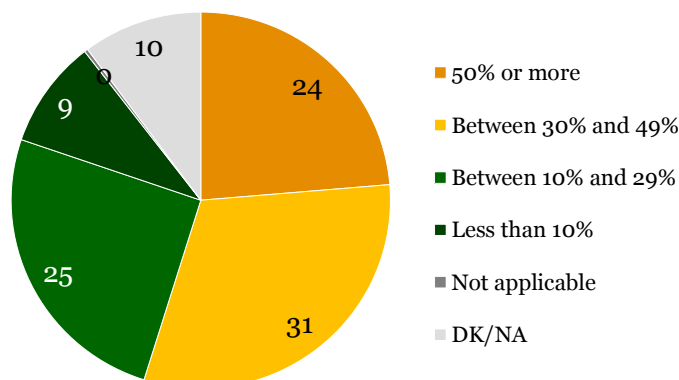
<sup>1</sup> Source: Eco-Innovation Observatory, Methodological Report 2010

## 1. Companies' material costs

### 1.1 Material costs as a percentage of “total costs”

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

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



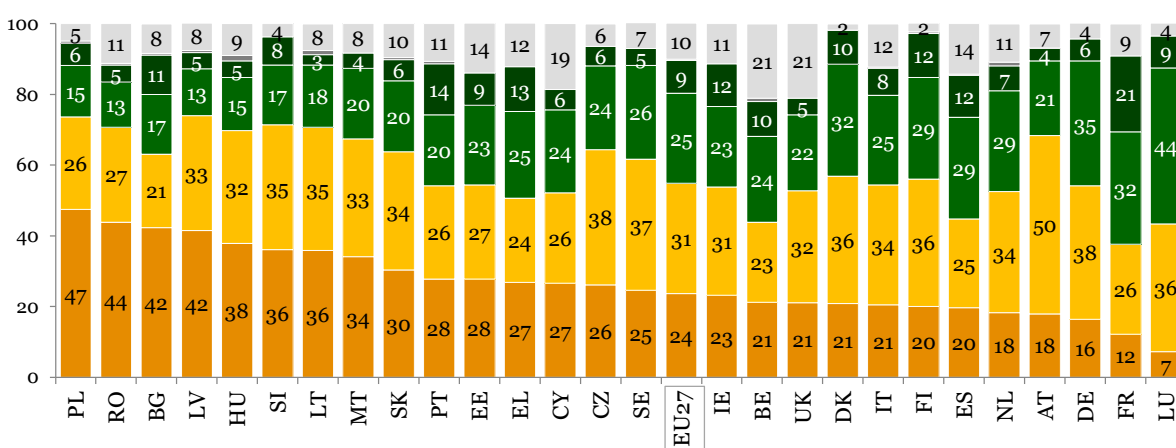
**Q1. What percentage of your company's total cost - i.e. gross production value - is material cost?**  
Base: all companies, % EU27

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

In France, Luxembourg, Belgium and Spain, less than half of respondents answered that 30% or more of their company's “total costs” consisted of “material costs”. In France, about a fifth (21%) of respondents answered that less than 10% of their company's total costs were material costs; in most other countries, however, less than 10% of respondents gave a similar response.

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

■ 50% or more ■ Between 30% and 49% ■ Between 10% and 29% ■ Less than 10% ■ Not applicable ■ DK/NA



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

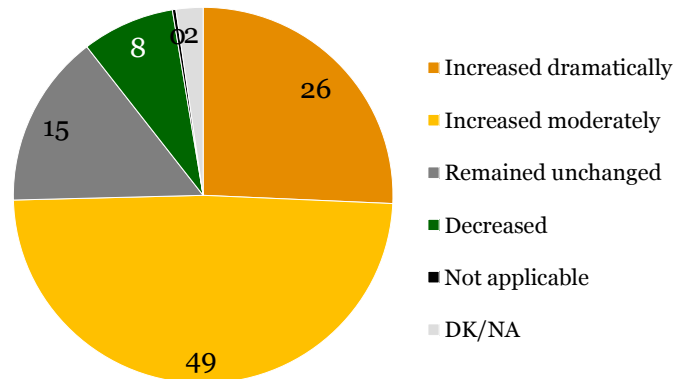
Companies with a high annual turnover were more likely to be material-intensive. For example, 33% of companies with an annual turnover of more than €50 million reported that 50% or more of their total production value was represented by material costs; the corresponding figure for companies with an annual turnover of less than €2 million was 22%.

## 1.2 Changes in companies' material costs

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

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

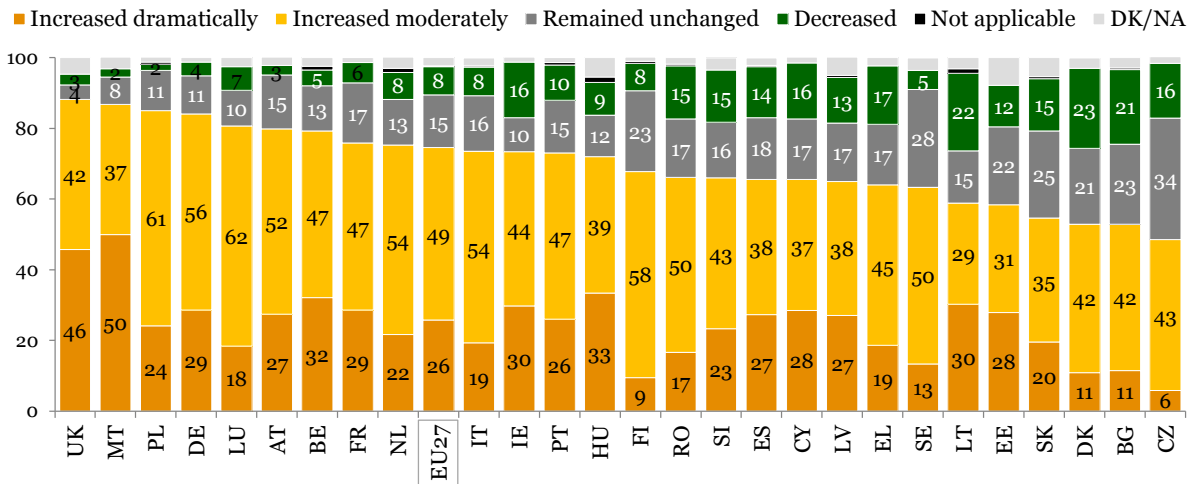
**How companies' material costs have evolved over 5 years**



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

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

### How companies' material costs have evolved over 5 years



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

Material-intensive companies were more likely to have experienced an increase in material costs in the past five years. For example, 65% of companies with less than 10% of material costs (as a percentage of "total costs") had seen a *moderate* or *dramatic increase* in the cost of materials in the past five years, this proportion increased to 78% for companies with material costs of more than 50% of their total costs.

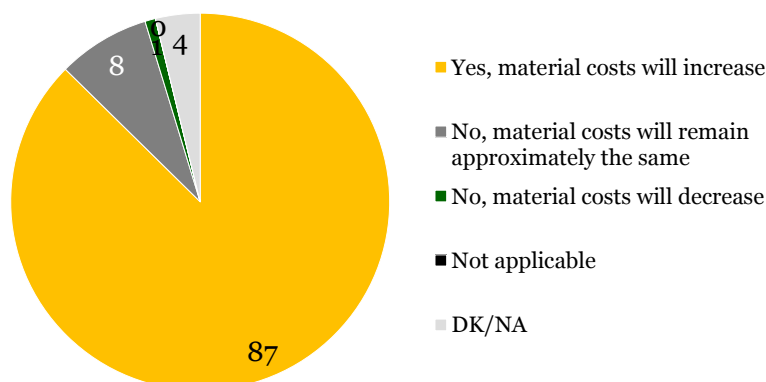
### 1.3 Expected changes in material costs

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

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

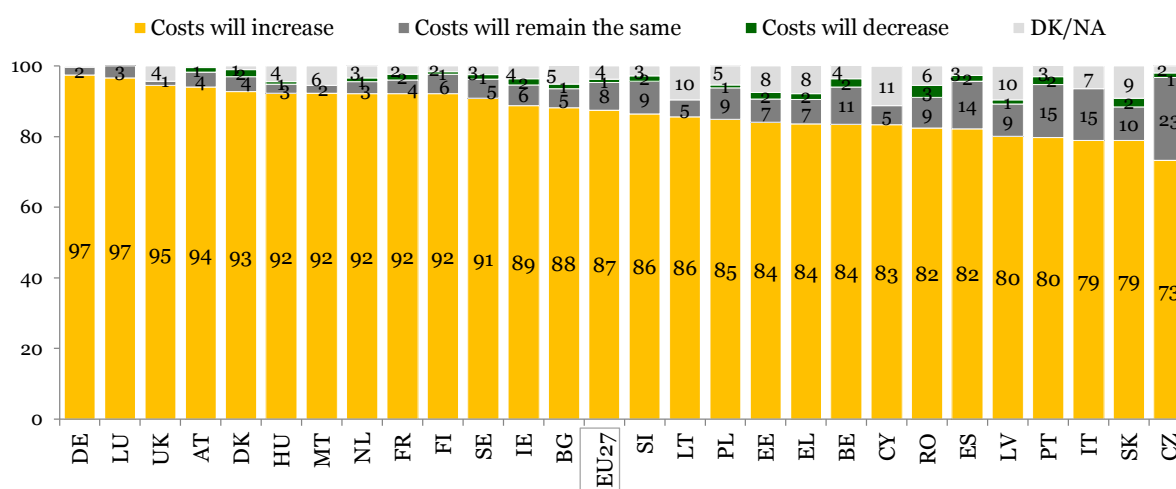
Entrepreneurs in the Czech Republic were the least likely to think that prices of materials would increase in the coming 5 to 10 years (73%); almost a quarter (23%) of respondents in that country thought that material prices would remain approximately the same in the coming 5 to 10 years.

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



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

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



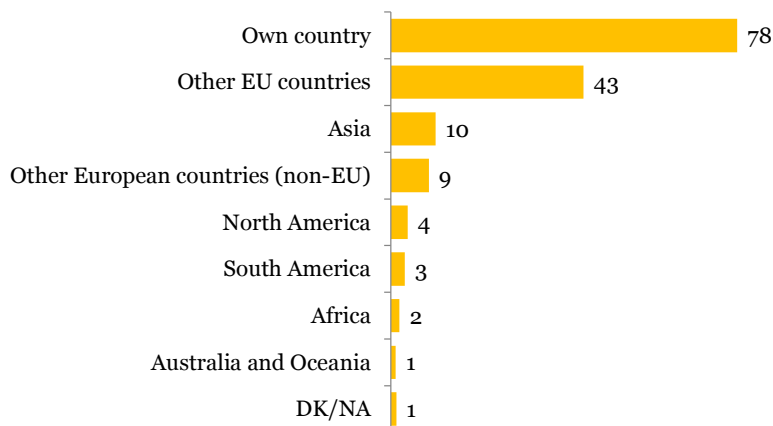
Q3. Do you expect price increases for materials in the coming 5 to 10 years?  
Base: all companies, % by country

## 1.4 Where do companies' materials originate from?

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

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

### Origin of most of the materials that companies use



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

Base: all companies, % EU27

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

In nine EU Member States, companies that often used materials from other EU countries outnumbered those that regularly used materials from their own country. For example, 82% of entrepreneurs in Malta said that many materials they used came from other EU countries, while 26% of entrepreneurs mentioned their own country. A similar picture emerged in Luxembourg, Slovenia, Estonia, Cyprus, Greece, Denmark, Ireland and Lithuania.

Across all types of companies, the largest proportion of respondents said that their company often used materials that came from (or originated from) their own country, while the second largest share said they regularly used materials from other EU countries. For example, 79% of small companies frequently used materials that originated from their own country, while 42% used materials from other EU countries.

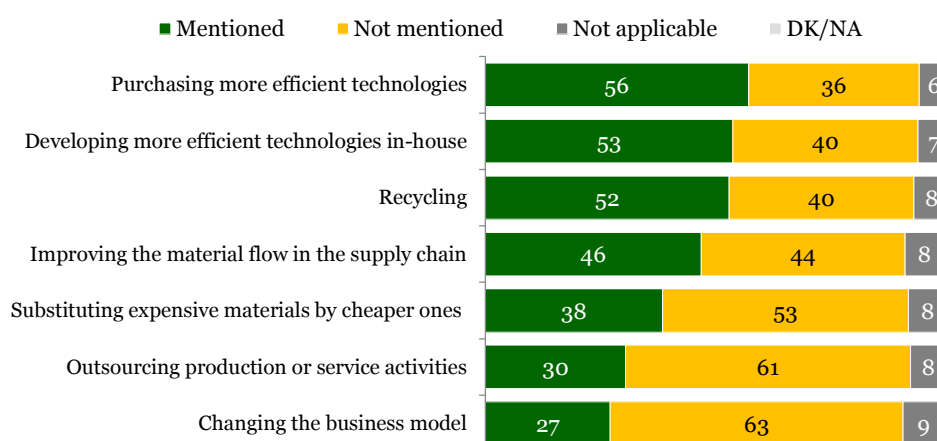


## 1.5 Changes implemented to reduce material costs

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

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

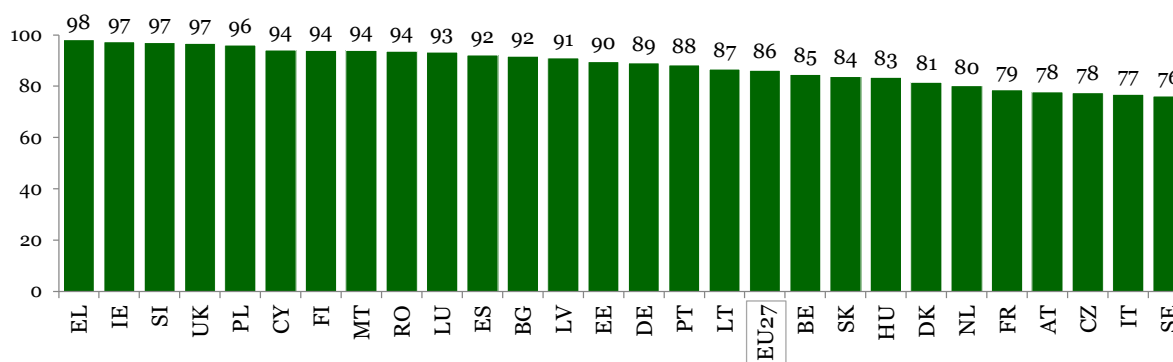
### Changes implemented to reduce material costs in past 5 years



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

Almost 9 in 10 (86%) companies in the EU had introduced at least one change in the past five years in order to reduce material costs; at the individual country level, this proportion ranged from 76% in Sweden to 98% in Greece. Across all countries, some of the largest proportions of respondents mentioned having introduced material-efficient technologies in the past five years (i.e. they purchased such technologies and/or developed them in-house).

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



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

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

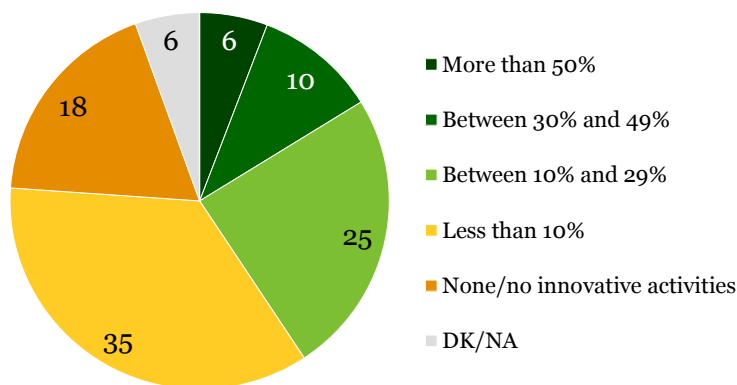
## 2. Eco-innovative activities

### 2.1 Share of innovation investments related to eco-innovation

Just over a third of companies (35%) reported that less than 10% of their innovation investments in the past five years were related to eco-innovation – i.e. implementing new or substantially improved solutions resulting in more efficient use of materials, energy and water. A quarter estimated that this share was between 10% and 29%.

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

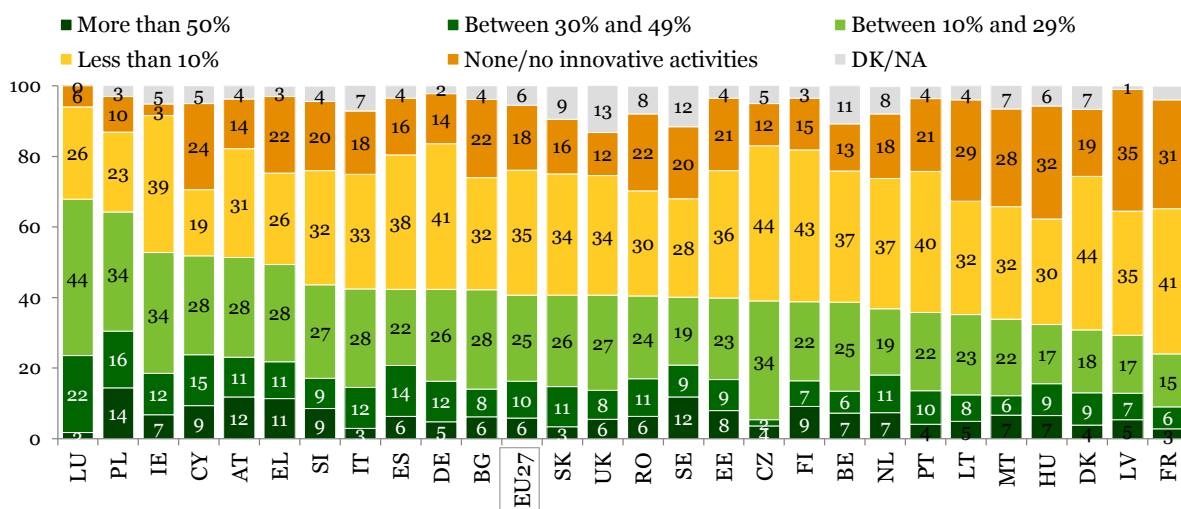
**Share of eco-innovation-related investments in last 5 years**



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

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

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



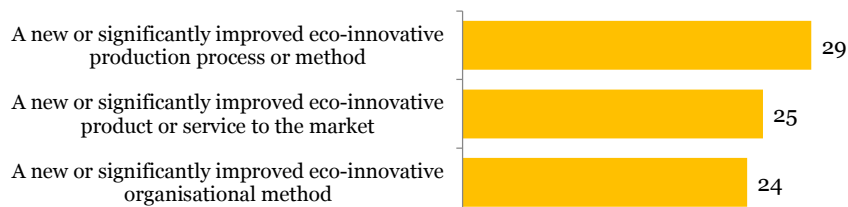
**Q6. Over the last 5 years, what share of innovation investments in your company were related to eco-innovation, i.e. implementing new or substantially improved solutions resulting in more efficient use in material, energy and water?**  
Base: all companies, % by country

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

## 2.2 Eco-innovations introduced in the past two years

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

### Introduction of various eco-innovations in past 2 years

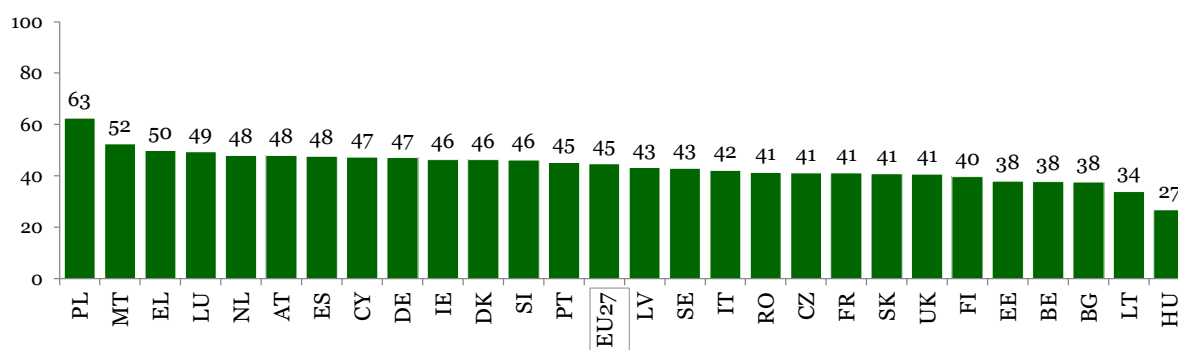


**D5. During the past 24 months have you introduced the following eco-innovation?**

Base: all companies, % of 'Yes' shown, EU27

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

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



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

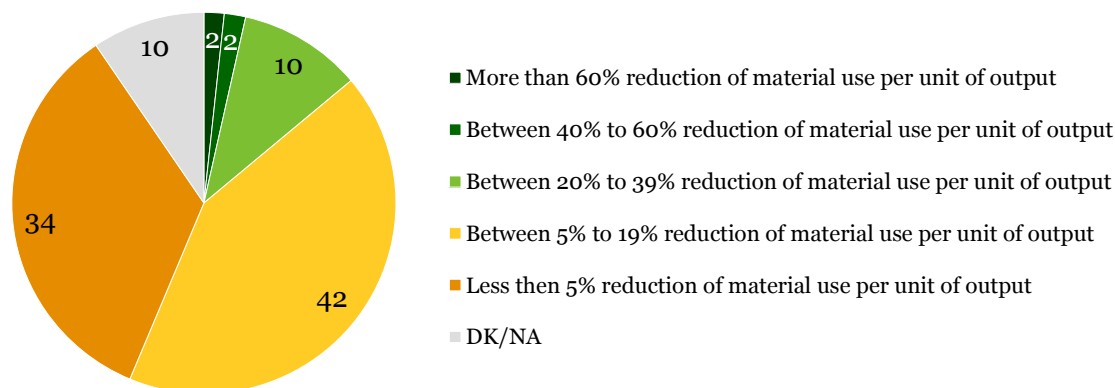
Base: all companies, % by country

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

### 2.3 Relevance of innovations in terms of resource efficiency

Among companies that had introduced at least one type of eco-innovation in the past two years, the largest number (42%) said that such eco-innovation had led to a reduction in material use of between 5% and 19% per unit of output, while roughly a third (34%) of respondents estimated that the reduction in material use had been less than 5% per unit of output. Smaller shares of respondents answered that their company's eco-innovations of the past 24 months had reduced material use by at least 20% per output unit.

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



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

Base: companies that introduced an eco-innovation, % EU27

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

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

### 3. Barriers to an accelerated uptake of eco-innovation

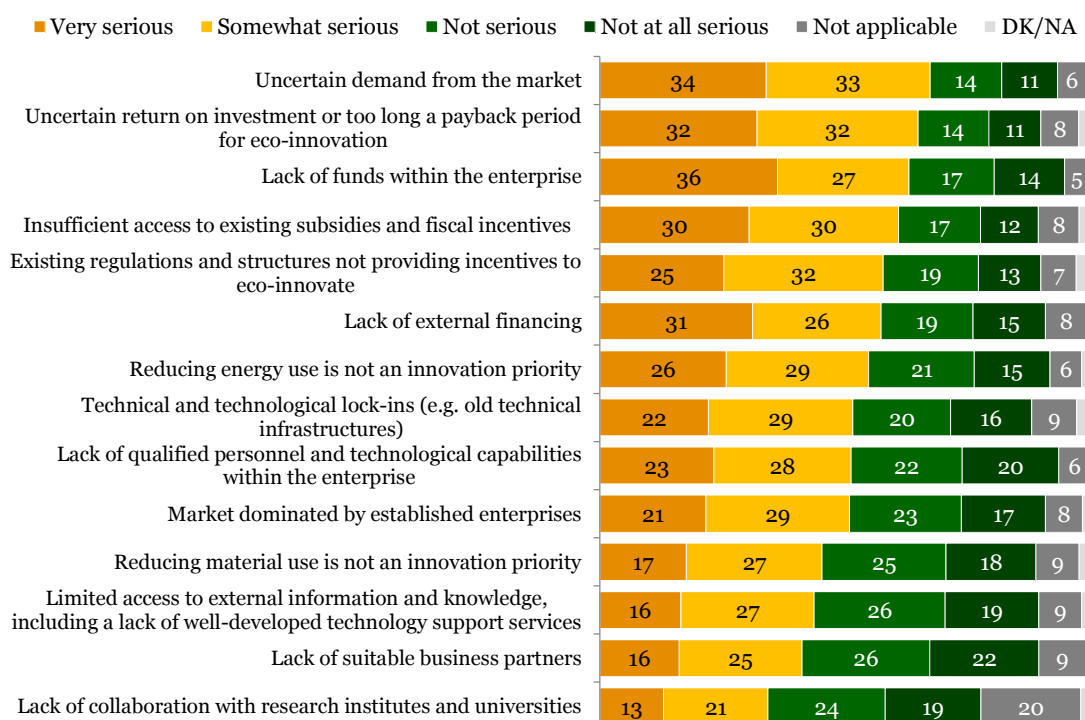
Interviewees were presented with 14 potential barriers to an accelerated development and uptake of eco-innovation. For each of the potential barriers related to financing and funds, a majority of respondents thought that it was a *very* or *somewhat serious* barrier to an accelerated development and uptake of eco-innovation. For example, more than a third (36%) of managers said that a lack of **funds within their enterprise** was a *very serious* barrier and roughly a quarter (27%) said that this was a *somewhat serious* barrier.

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

A majority of respondents also said that **existing regulations and structures** did not provide incentives to eco-innovate; 25% said this was a *very serious* barrier and 32% a *somewhat serious* barrier. Respondents were, however, somewhat less likely to identify **technical and technological lock-ins** (22% “very serious” and 29% “somewhat serious” responses) or a **market dominated by established companies** (21% “very serious” and 29% “somewhat serious” responses) as barriers to a faster uptake of eco-innovation in their company.

A **lack of qualified personnel and technological capabilities within their enterprise** was considered a *very serious* barrier by 23% of respondents, while 28% said this was a *somewhat serious* barrier. A smaller number of respondents thought that **limited access to external information and knowledge** was a barrier to introducing eco-innovations in their company (16% “very serious” and 27% “somewhat serious” responses).

#### Barriers to accelerated eco-innovation uptake and development



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

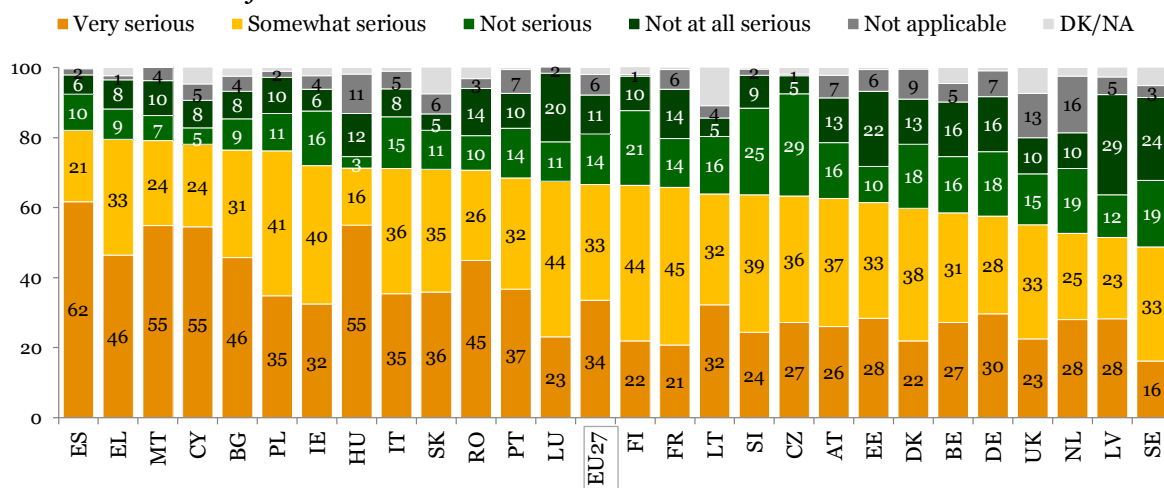
Base: all companies, % EU27

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

Across all countries, roughly one in two – or more – respondents answered that an **uncertain demand from the market** was a *very serious* or *somewhat serious* barrier (from 49% in Sweden to 83% in Spain). A majority of respondents in Hungary, Cyprus, Malta and Spain said that an uncertain demand from the market was a *very serious* barrier (55%-62%).

### Barriers to accelerated eco-innovation uptake and development for companies

#### Uncertain demand from the market

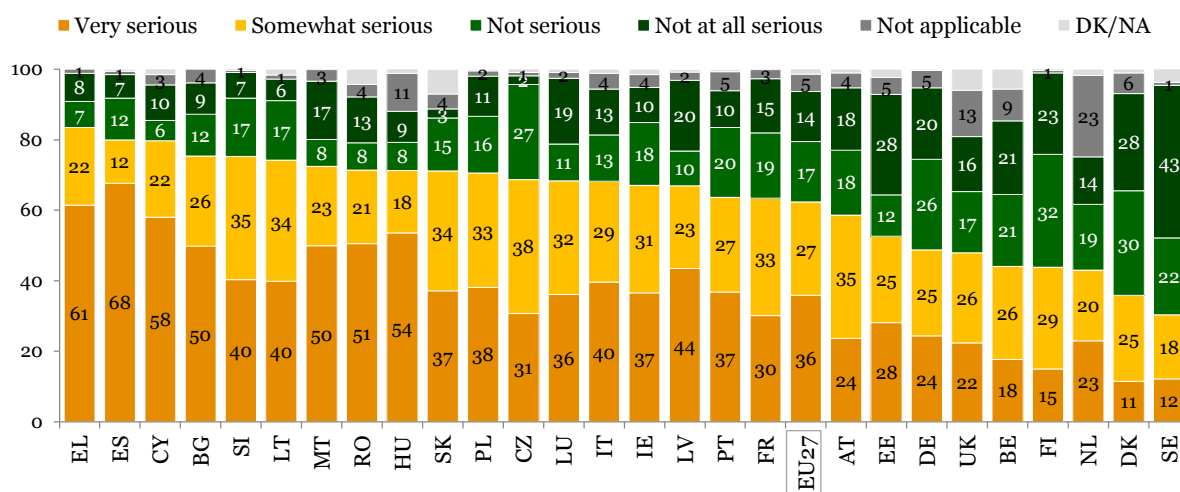


Q7. I will list you some barriers that could represent an obstacle to accelerated eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very serious, somewhat serious, not serious or not at all serious barrier in case of your company?  
Base: all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

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

### Barriers to accelerated eco-innovation uptake and development for companies

#### Lack of funds within the enterprise

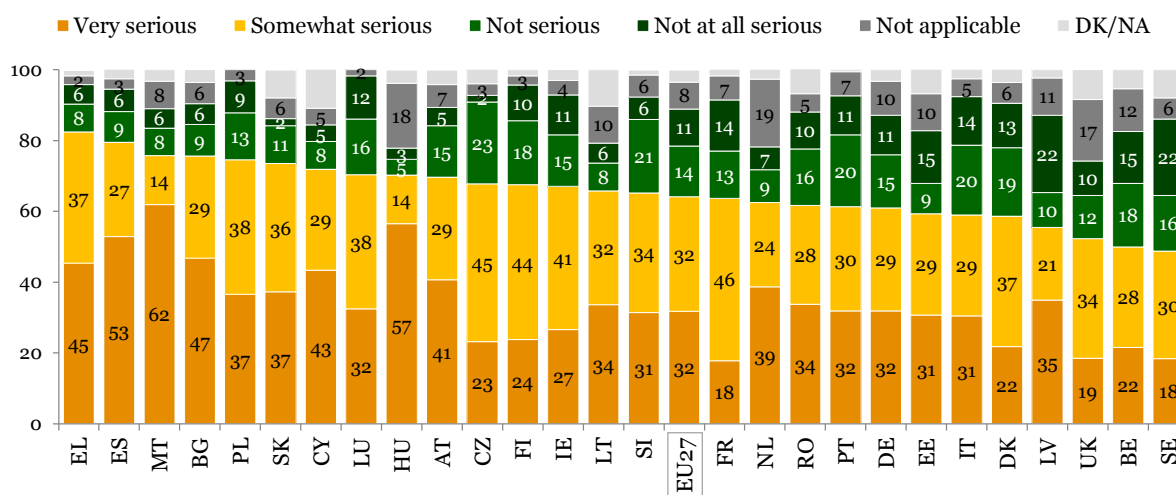


Q7. I will list you some barriers that could represent an obstacle to accelerated eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very serious, somewhat serious, not serious or not at all serious barrier in case of your company?  
Base: all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

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

### Barriers to accelerated eco-innovation uptake and development for companies

*Uncertain return on investment or too long a payback period for eco-innovation*



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

Base: all companies, % by country

For most of the barriers listed in the survey, respondents in small companies (in terms of workforce or annual turnover) were more likely than those in the larger (medium-size) companies to describe the barrier presented to them as being *very* or *somewhat serious*. For example, 32% of managers of medium-sized companies, as opposed to 42% of managers in small ones, answered that a lack of suitable business partners was a *very serious* or *somewhat serious* barrier to eco-innovation.

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

## 4. Drivers for an accelerated uptake of eco-innovation

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

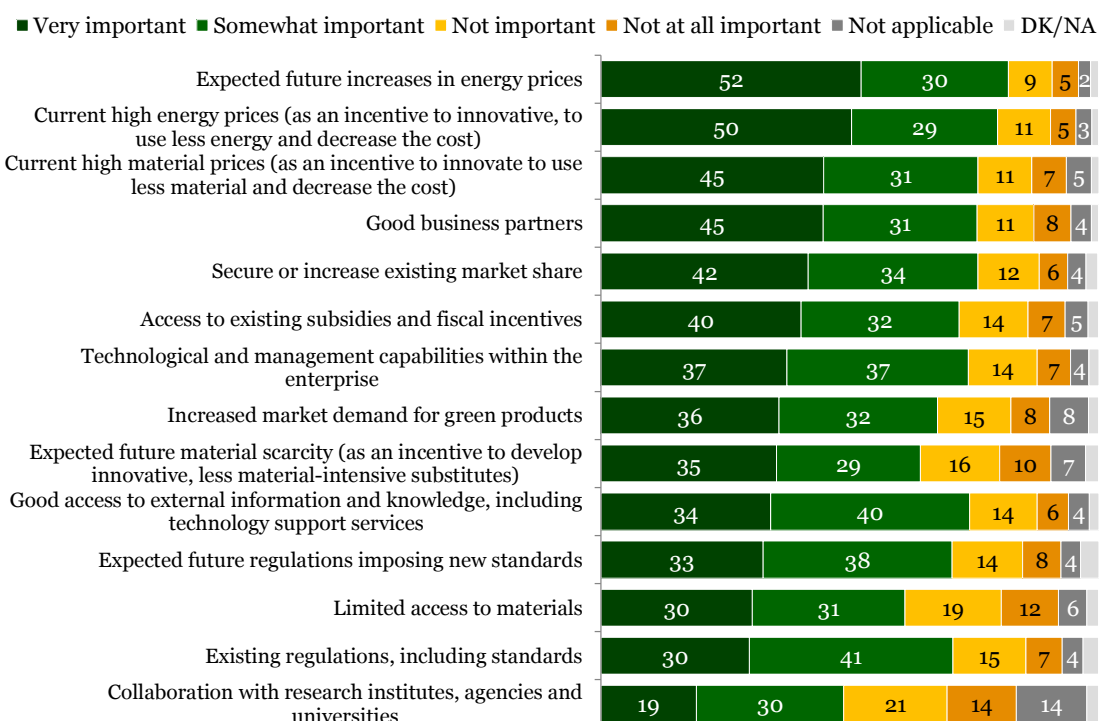
One in two respondents considered **current high energy prices** to be a *very important* driver to accelerate eco-innovation uptake and development in their company and a similar proportion (52%) said the same about the **expected future increases in energy prices**.

More than 4 in 10 (45%) managers said that having **good business partners** could be a *very important driver* of accelerated eco-innovation development and almost 4 in 10 (37%) answered in the same way when asked about the importance of **technological and management capabilities within their enterprise**

**Securing or increasing their company’s existing market share** was mentioned as a *very important* driver of eco-innovation developments by 42% of respondents and **access to existing subsidies and fiscal incentives** was described as being *very important* by 40% of entrepreneurs.

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

### Drivers that could accelerate eco-innovation uptake and development



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

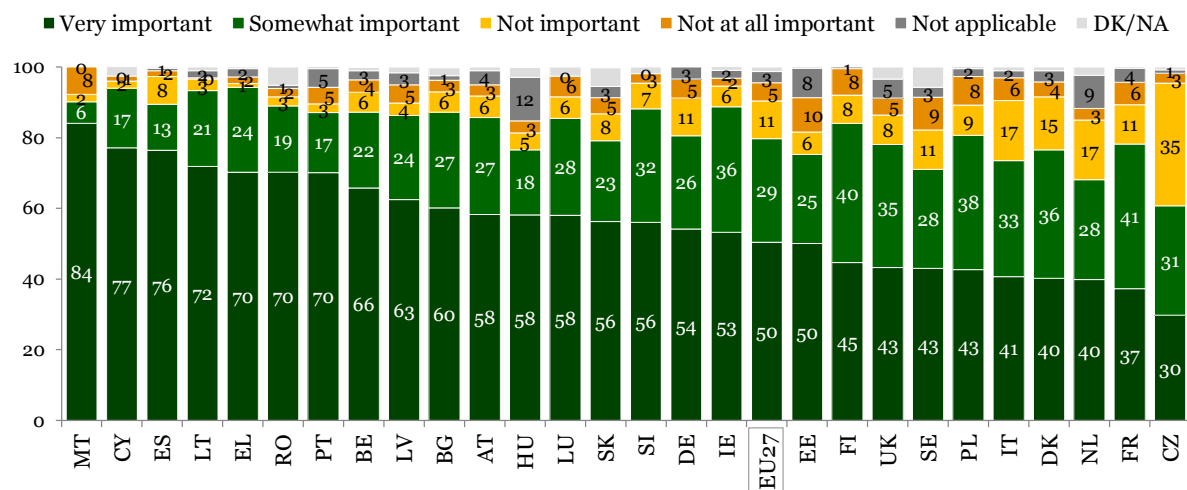
Base: all companies, % EU27



Of the 14 drivers listed in the survey, **current and future high energy prices** were mentioned most frequently as being *very important* drivers of accelerated eco-innovation uptake in respondents' companies. For example, across most countries, more than three-quarters of interviewees said that current high energy prices were a *very* or *somewhat important* driver of an accelerated eco-innovation uptake and development in their company. Furthermore, in three countries, more than 9 in 10 respondents said that current energy prices were *very* or *somewhat important*: Lithuania (93%), Cyprus and Greece (both 94%).

## Drivers that could accelerate eco-innovation uptake and development

### Current high energy prices



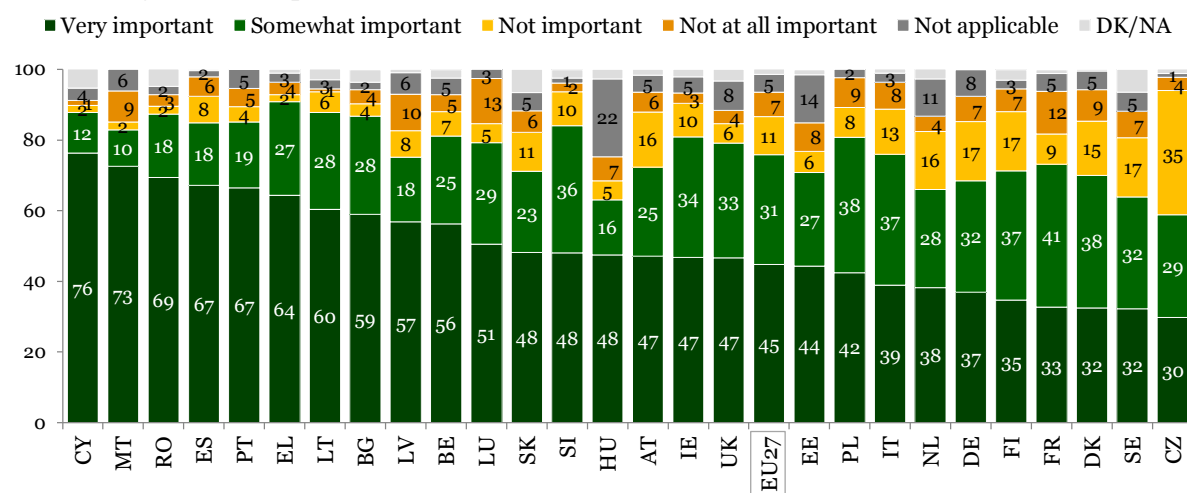
Q8. I will list you some drivers that could accelerate eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very important, somewhat important, not important or not at all important driver in case of your company?

Base: all companies, % by country

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

## Drivers that could accelerate eco-innovation uptake and development

### Current high material prices



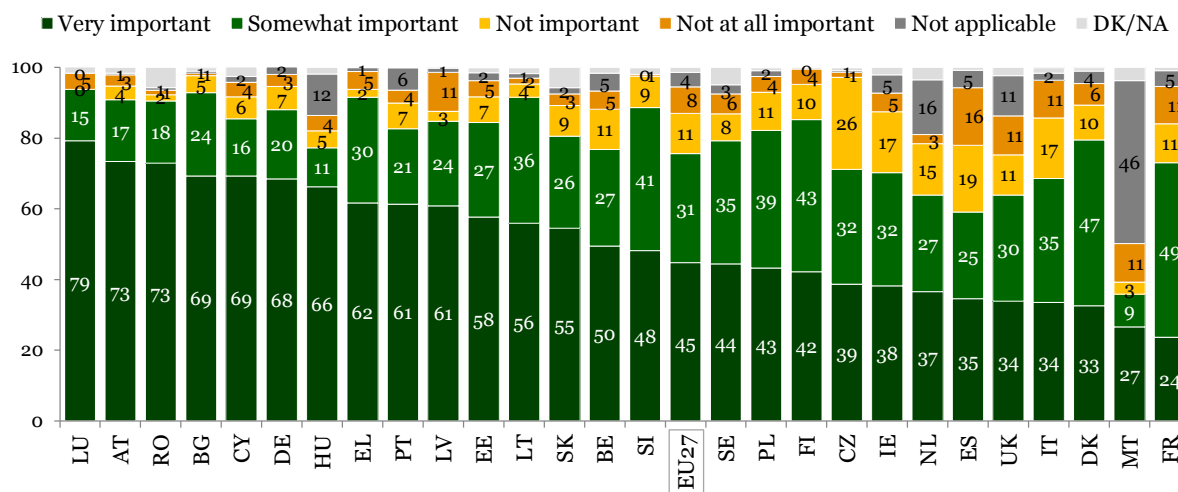
Q8. I will list you some drivers that could accelerate eco-innovation uptake and development for a company. Please tell me for each of them if you consider them a very important, somewhat important, not important or not at all important driver in case of your company?

Base: all companies, % by country

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

### Drivers that could accelerate eco-innovation uptake and development

#### Good business partners



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

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

Respondents in material-intensive companies were more likely to say that the current high material prices and limited access to materials were *very important* eco-innovation drivers; they were, however, also more likely to describe the *current* and *future* high energy prices as being *very important drivers* of eco-innovation in their company.

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