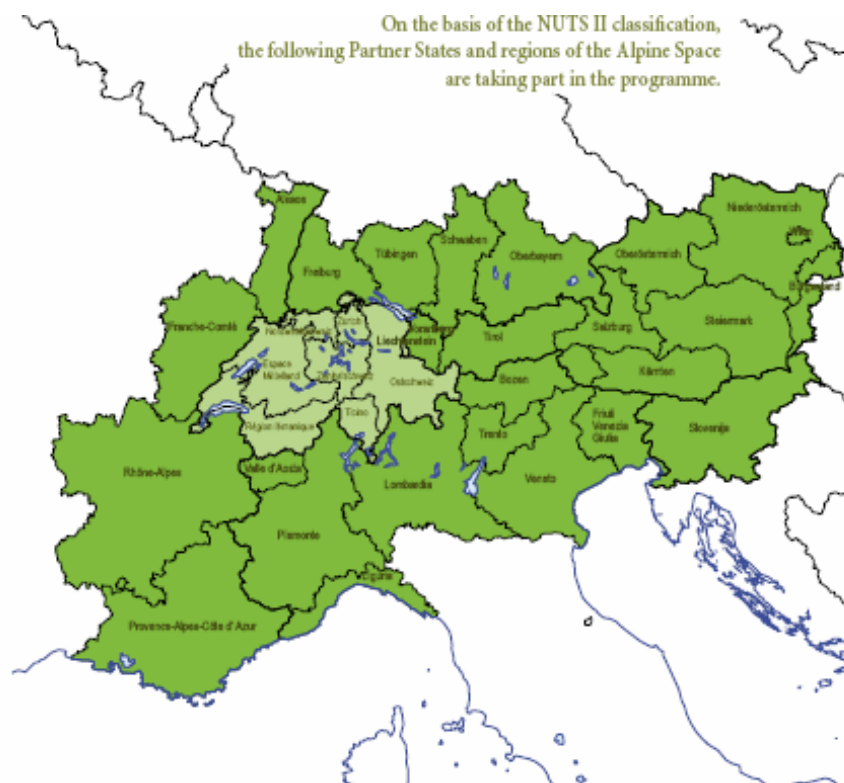


Results of the Eco-Industries survey in Alpine Space



This project has received European Regional Development Funding through the INTERREG IIB Community Initiative



Interreg III B

The results of the questionnaire are provided within the INTERREG III B project ASPECT by the following project partners:

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1 Classification into the overall project

The European Project ASPECT (Alpine Space promotion of eco-companies transboundary) aims to promote and develop eco companies in the Alpine Space. Therefore a two-year-program was carried out to stimulate this industry by providing different tools (methodology, database, etc.).

So far, nine partners are associated to the project, coming from the six countries of the Alpine Space: Austria, France (Rhônes-Alpes), Germany (Bavarian Alpine Space), Italy (Piemonte and Provincia di Mantova), Slovenia and Switzerland. Together all partners are striving to respond to one common objective: bridging the gap between economic development and environmental protection of this area.

2 Survey and respondents

The ASPECT-survey is based on a business enquiry, which was directed to companies engaged in environmental technology (Eco-companies) in all Alpine Space regions of ASPECT.

With a common questionnaire each ASPECT-partner directed the same questions to eco-companies in the respective region to get comparable results for the entire Alpine space.

Major contents of the survey were:

- Which topics Eco-companies in Alpine Space would like to get further support
- General company data (branch, employees, turnover, export-activities, etc.)
- How organise Eco-companies their Research & Development activities?
- Where do they get further support (organizations, networks, institutions)?

This paper contains the main results from 341 respondents of the ASPECT-survey.

Alpine Space region	Contacted	Respondents	Response rate
Austria	500	72	14,4 %
Germany (Bavarian Alpine space)	574	95	16,6 %
France (Rhônes-Alpes)		76	
Italy (Piemonte)	491	42	8,6 %
Italy (Mantova)	21*	21	
Slovenija	273	29	10,6 %
Switzerland	6*	6	

Table 1: Contacted persons and response rate

3 Key findings

3.1 Determination of demand and possible offerings of the ASPECT-project

The ASPECT-project offers several support possibilities. In order to know, where Eco-companies see the largest support-needs, the survey made suggestions, which the respondents evaluated. The answers gave hints as to the further development of the ASPET project as well as for future offerings of support institutions like chambers and municipal or regional business development departments.

* In the region Mantova and in Switzerland the survey was made by personal interviews.

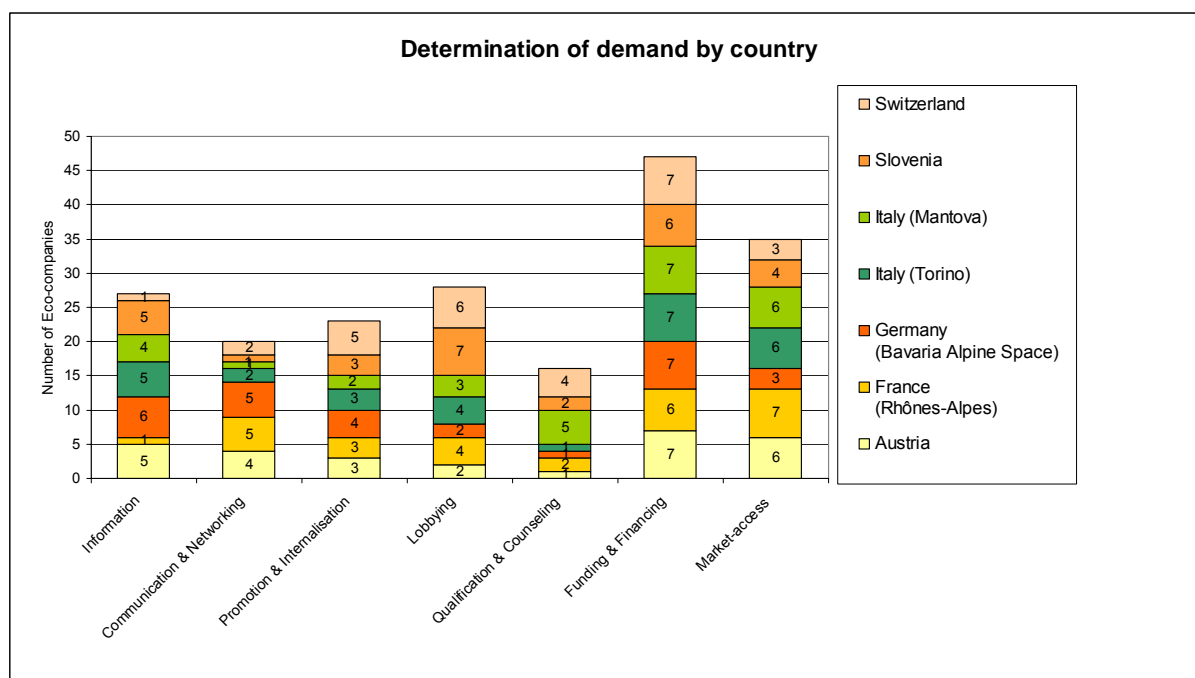


Table 2: Determination of demand by country

(Multiple answers were permitted)

The following table shows the Top 10 support needs over all ASPECT-regions.

priority	topic	support need
1.	Funding & Financing	Advertising of possible European funding
2.	Funding & Financing	Advertising of possible Non-European funding ¹
3.	Funding & Financing	Joint application for funding programs
4.	Market-access	Regulatory watch
5.	Market-access	Access to existing market studies
6.	Lobbying	Create a guideline for local and regional decision makers on how to create good climate and framework for environmental technology companies
7.	Information	Setting up an international database or provide access to an existing one concerning cooperation partners
8.	Promotion & Internalisation	Face to face match making events

¹ includes national funding

9.	Communication & Networking	Development of regional networking activities
10.	Qualification & Counseling	Financing

Table 3: Top 10 of the possible offerings within the ASPECT-project

As expected, Eco-companies all over Alpine Space have high support demand in the topic “Funding & Financing”. Obviously measures are missing to make it easier for innovative SMEs to access investment money and funding to establish start-ups, pilot plants or research activities. Especially access to public funding seems to be a problem. While various databases describe funding programs, SMEs need support to assess the needs for defining and the chances of applications. Respondents also indicated that they are lacking general skills to describe research and development projects and that they need means to find possible cooperation partners for such projects.

Besides funding there is a high demand for support in topic “Market-access”: SMEs are obviously lacking an overview of the market situation and future trends as well in the Alpine Space and all national and international markets. In the field of “Information” SMEs are looking for more hints as to possible cooperation partners for research, product development and market penetration.

3.2 General information about the company

3.2.1 Sectors

Question: Which sector your company is appending to?

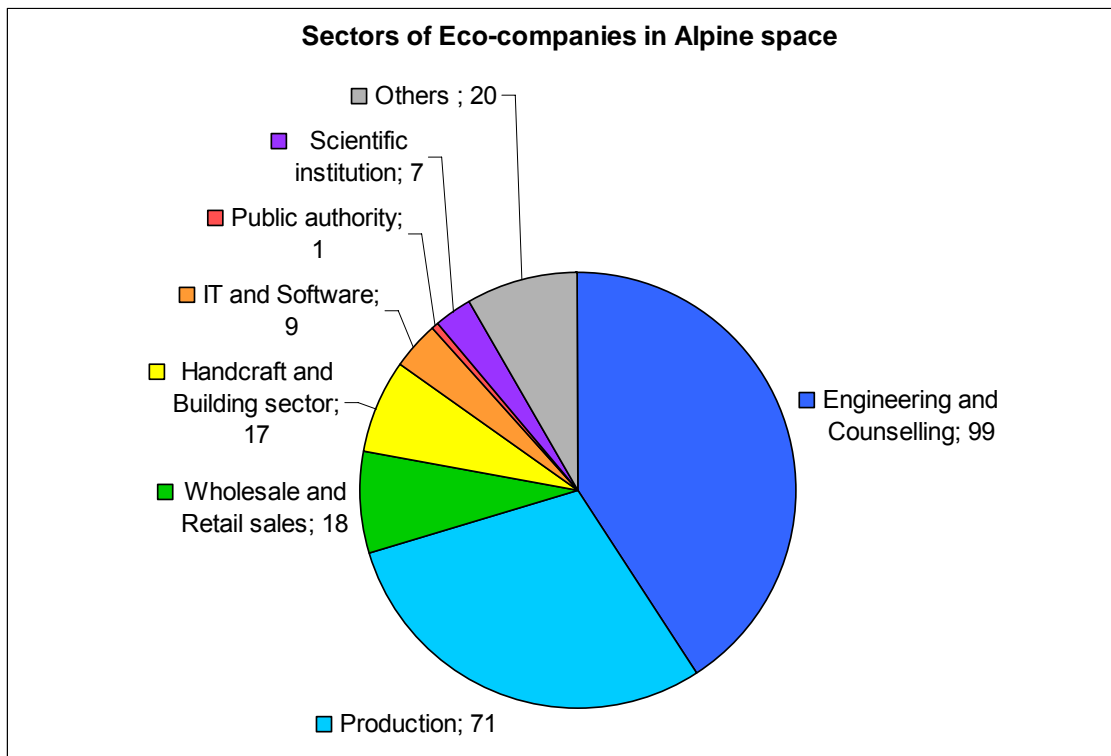


Table 4: Sectors of Eco-companies in Alpine Space (n=242)

More than 2/3 of the respondent companies operate in the sectors Engineering and Counselling and Production.

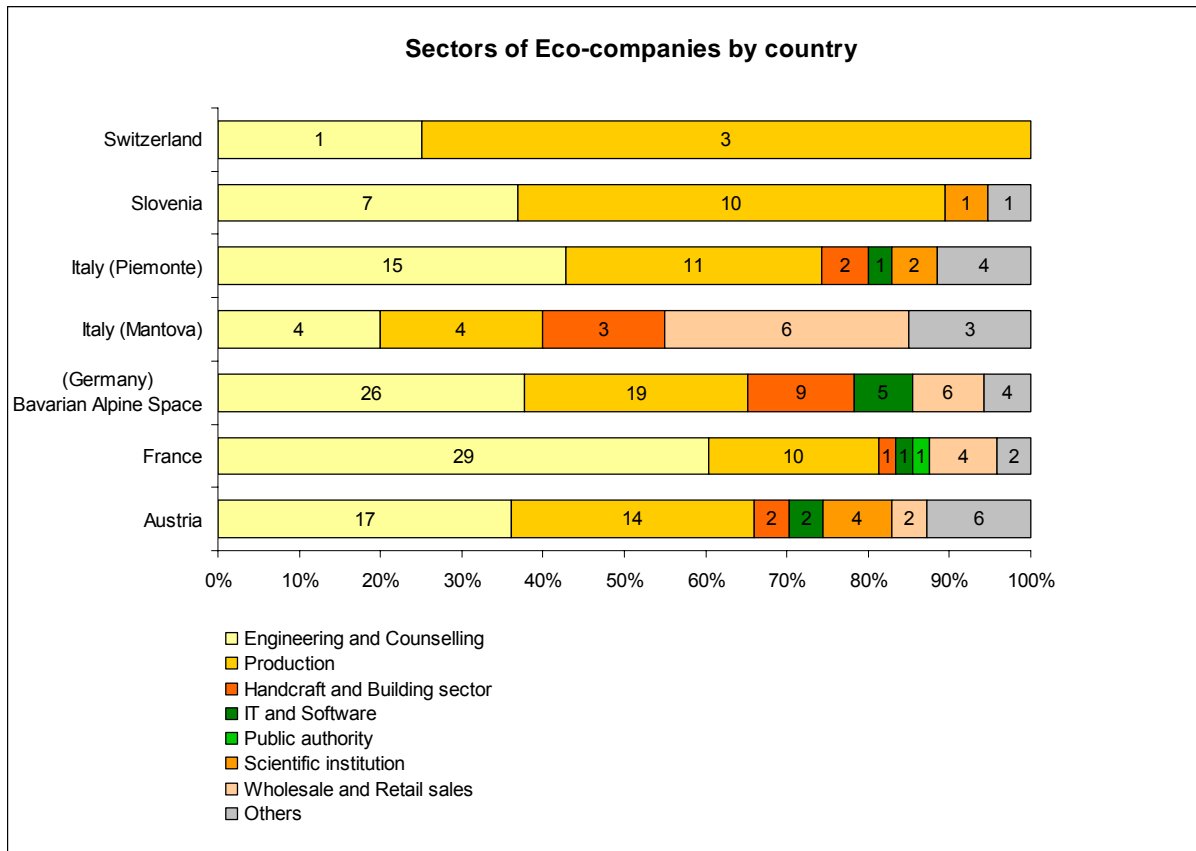


Table 5: Sectors of Eco-companies in Alpine Space by country

Over all Aspect-regions the sector “Engineering and Counselling” is the most common sector, followed by sector “production” takes up the second position.

3.2.2 Age of Eco-companies in Alpine Space

Question: How long does the company exist?

(No elicitation of responses for France and Switzerland).

The survey shows that more than half of the companies have an operational history of less than twenty years. Remarkable is the percentage of start-ups (up to 5 years), especially in Austria and Germany (Bavarian Alpine Space). Apart from the Slovenian data, it seems that there are only small quotes of old-established companies in Alpine space.

A total of 81% of all Eco-companies were established during the last 30 years. The majority of Eco-companies have been operating for less than 20 years.

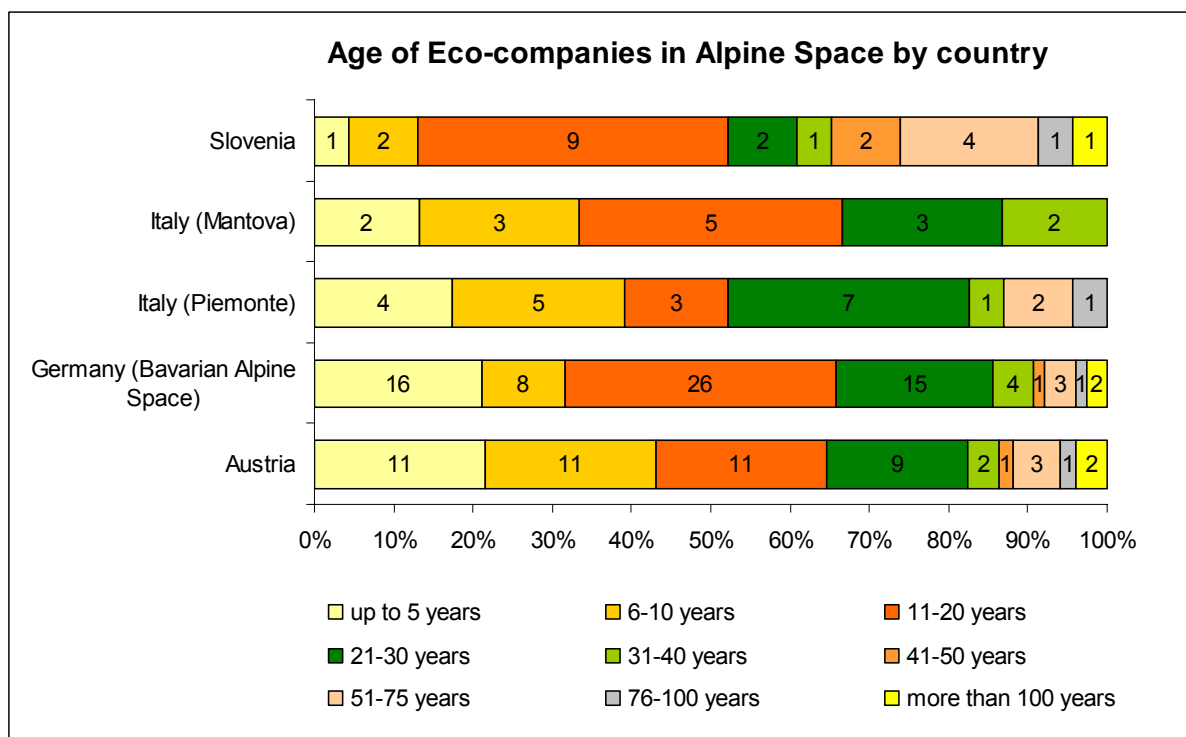


Table 6: Age of Eco-companies in Alpine Space by country (n=188)

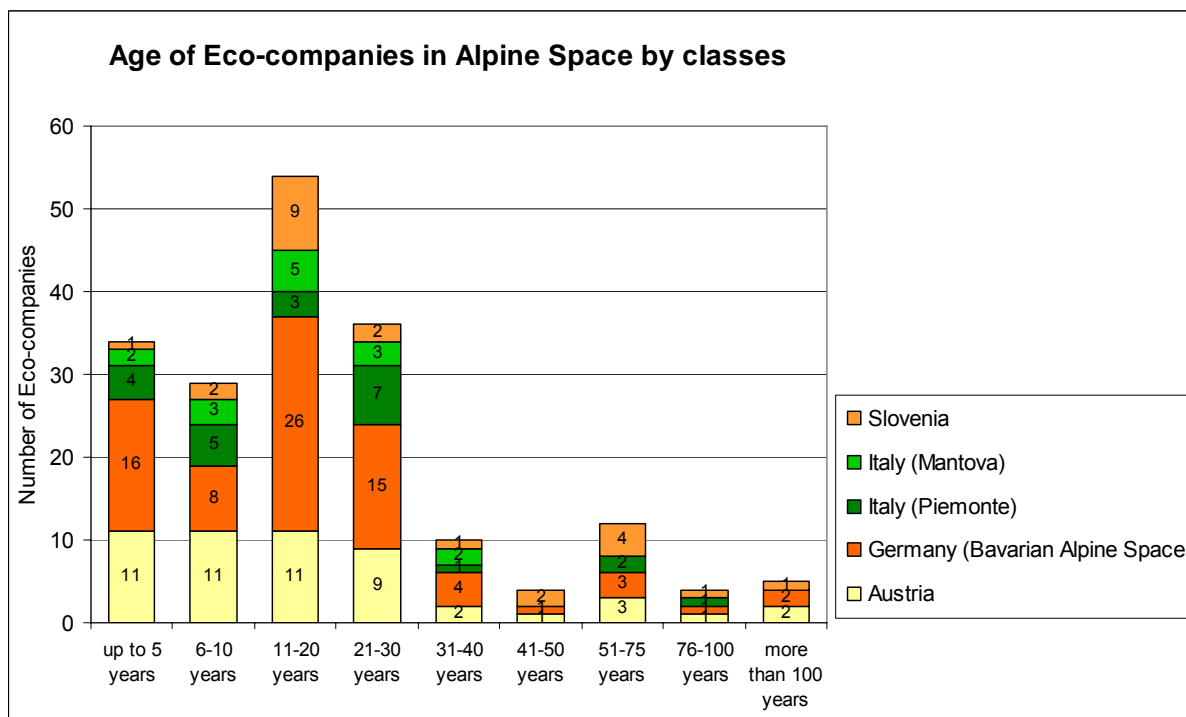


Table 7: Age of Eco-companies by classes (n=188)

3.2.3 Number of employees in Eco-companies

Question: How many employees work for the company?

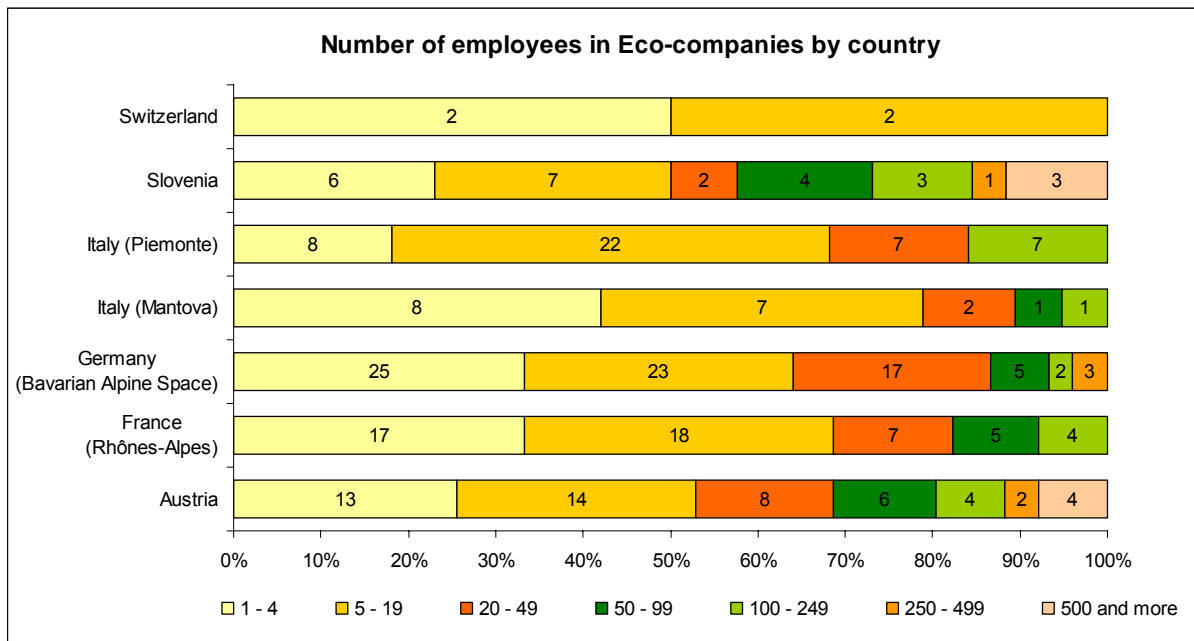


Table 8: Number of employees in Eco-companies by country (n=270)

The table shows that in all 6 countries at least 50% of the interviewed Eco-companies have less than 20 employees. That points out, that the majority of Eco-companies in Alpine Space are small and micro enterprises.²

² SME-Definition (European Commission):

Enterprise category	Headcount	Turnover	or
medium-sized	< 250	≤ € 50 Million	≤ € 43 Million
small	< 50	≤ € 10 Million	≤ € 10 Million
micro	< 10	≤ € 2 Million	≤ € 2 Million

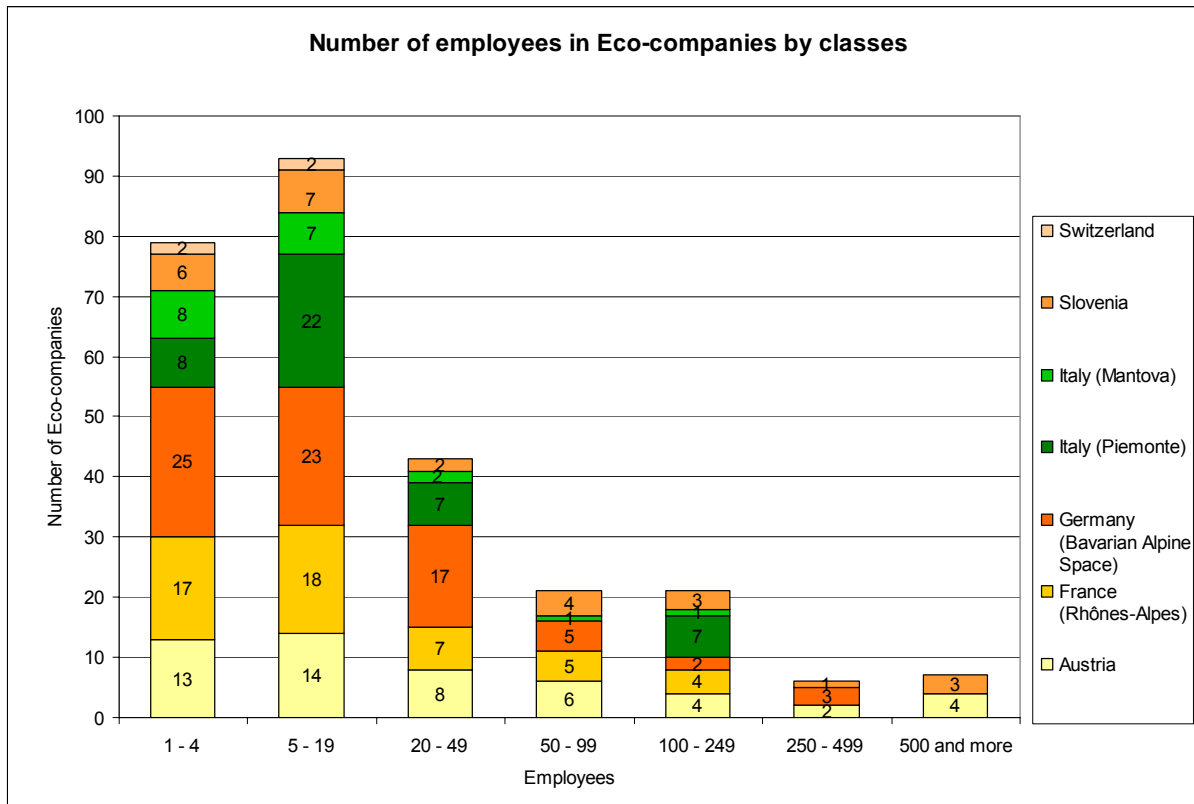


Table 9: Number of employees in Eco-companies by classes

3.2.4 Annual turnover of Eco-companies

Question: What was your turnover in 2005?

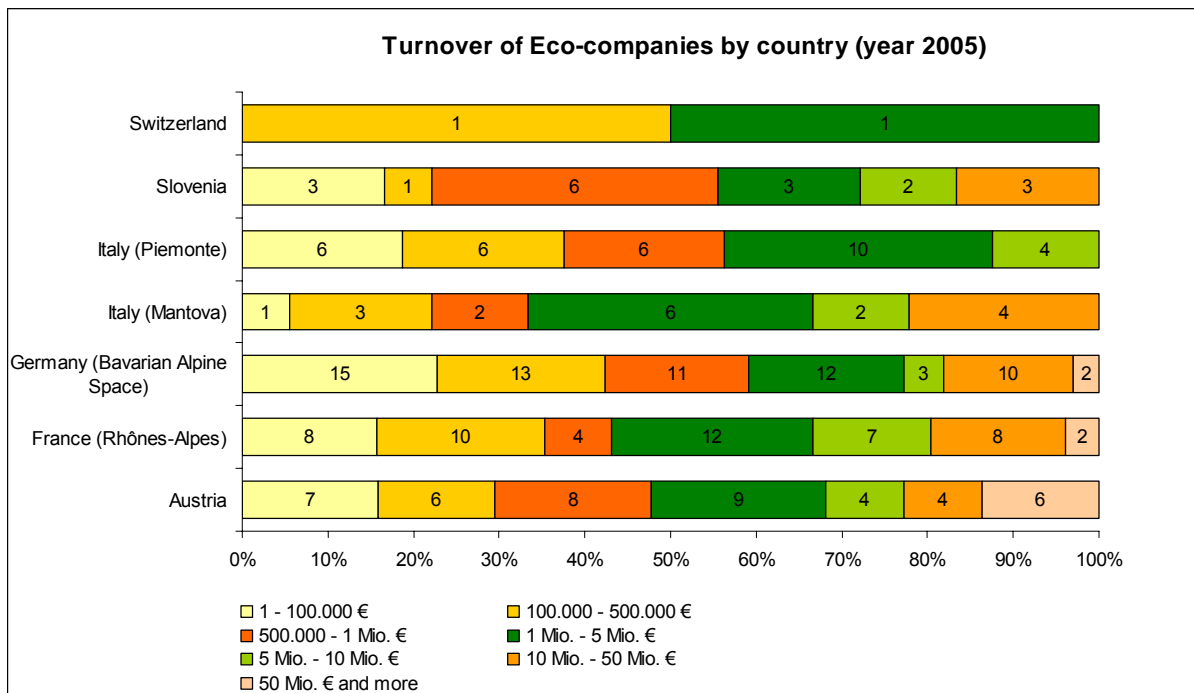


Table 10: Turnover of Eco-companies by country (year 2005)

Table 10 shows that the region Mantova, France and Austria reached more bigger companies (over 1 mio. turnover).

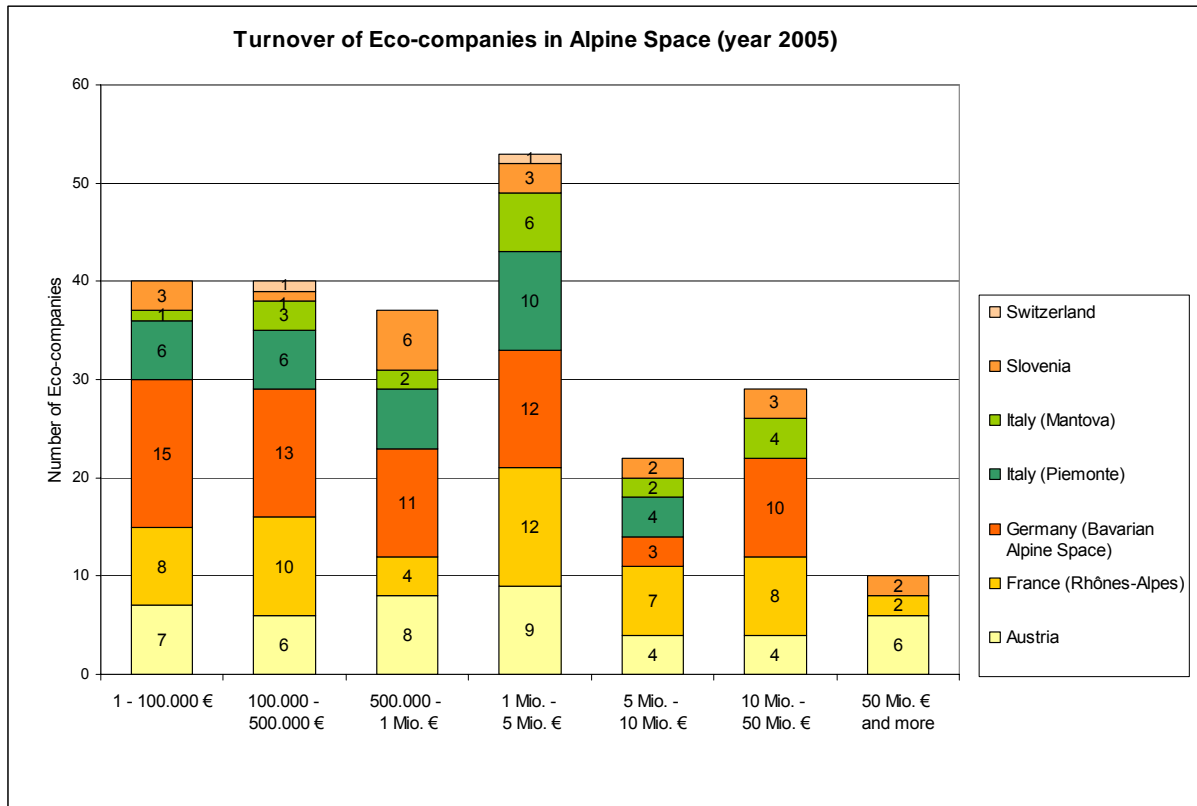


Table 11: Turnover of Eco-companies in Alpine Space by classes (year 2005)

The table shows that most of the companies are micro- or small-sized enterprises with a turnover up to 5 Million Euro.

3.2.5 Primary markets of Eco-companies

Question: Which markets are you in? ³

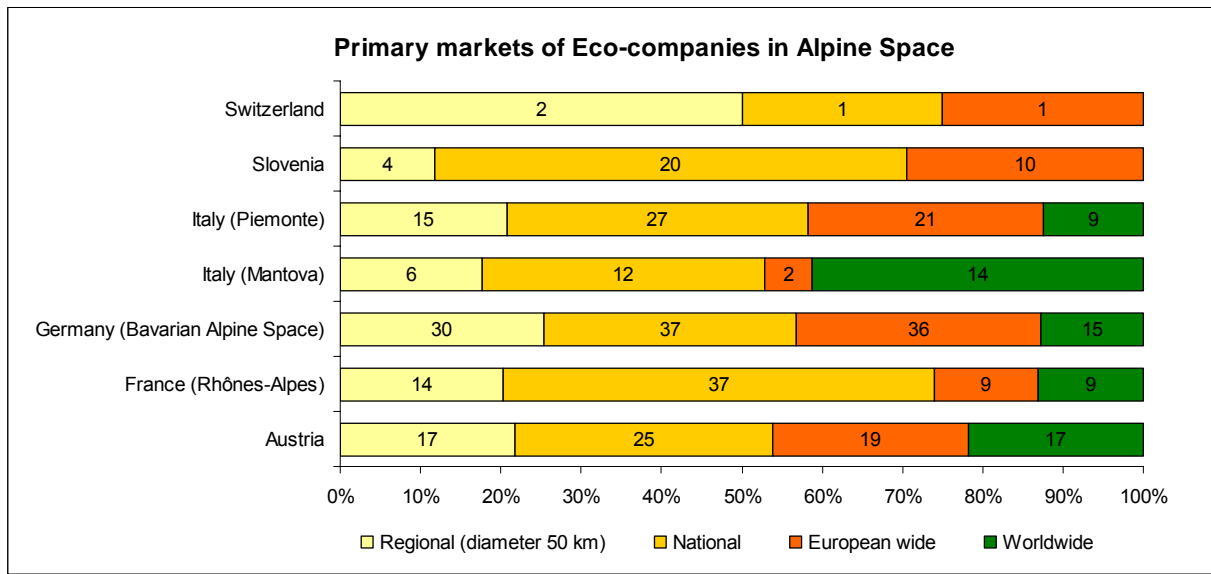


Table 12: Primary markets of Eco-companies in Alpine space

More than 50 % of the responding companies have their main markets in the Region (diameter 50 km) and nation-wide. For Italy (Piemonte), Germany (Bavarian Alpine Space) and Austria the Europe-wide market has nearly the same relevance as the National market.

In average over all ASPECT-regions 25 % of the respondents are (mostly in addition to other levels) serving the regional market level.

³ Multiple answers were permitted.

3.2.6 Certified management systems

Question: What certified management systems did your company implement? ⁴

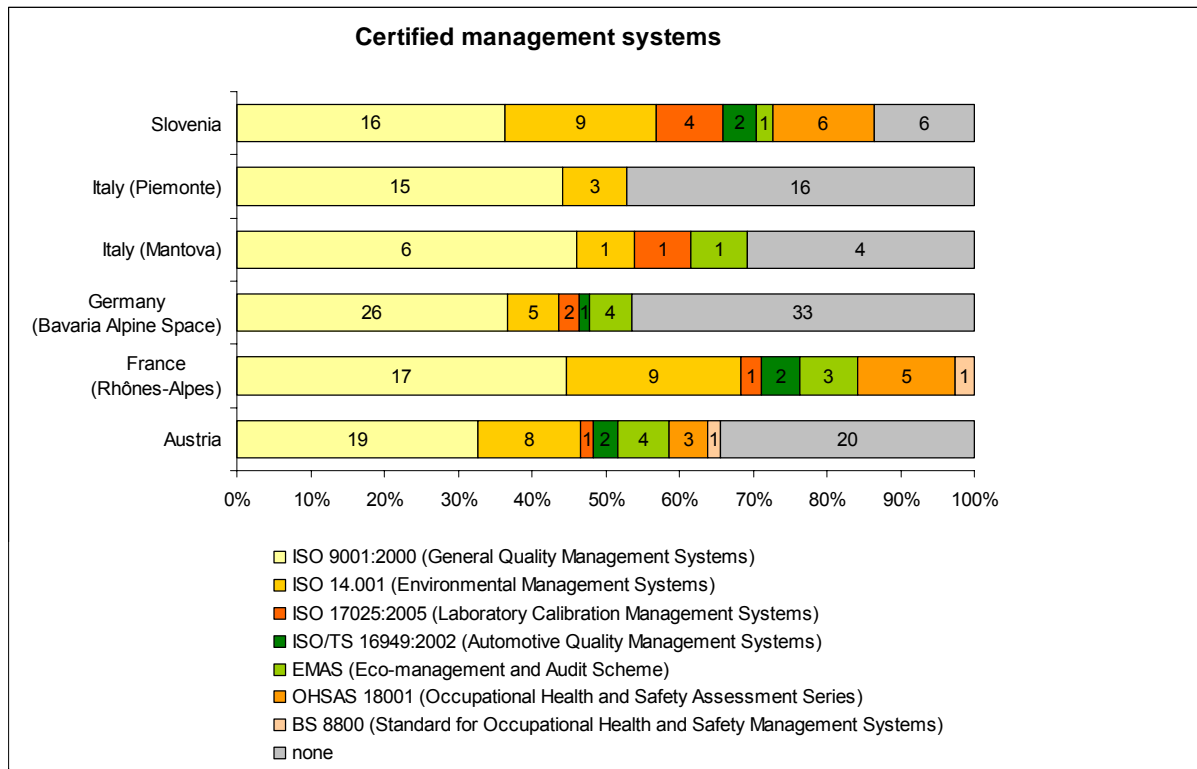


Table 13: Certified management systems by country ⁵

A majority of Eco-companies in Alpine space are striving for a high level of quality and reduction of environmental impact in their operation and implemented respective management systems.

⁴ Multiple answers were permitted.

⁵ Respondents could nominate multiple choices. To achieve comparability between the choices a normalization was applied with 100 corresponding to the sum of all nominations. Thus the size of a block describes the relative relevance of the corresponding choice.

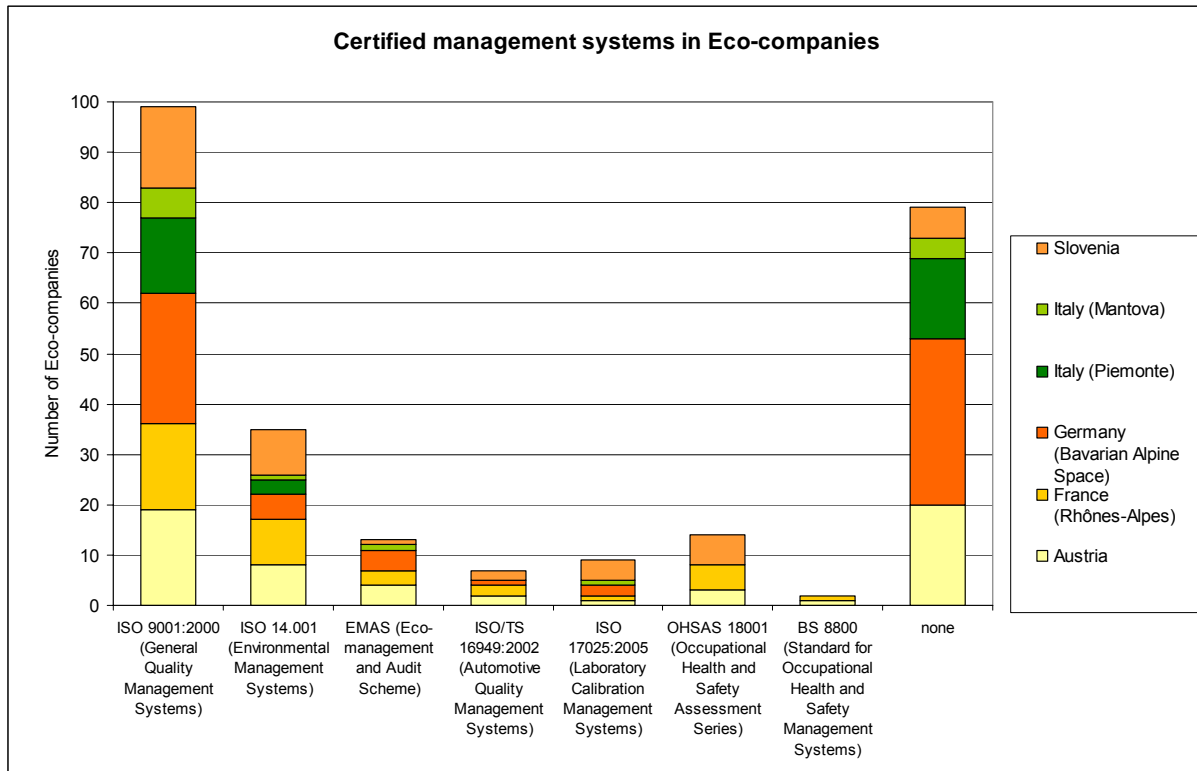


Table 14: Certified management systems in Eco-companies

More than 30 % of the responding Eco-companies in Alpine space have a certified quality management system fulfilling the ISO 9001 quality and / or IOS 14001 environmental standard. Other standards don't seem to play a decisive role.

3.2.7 Areas of activity / Eco-companies definition

Question: Please mark areas of activities your company or part of the company is in. ⁶

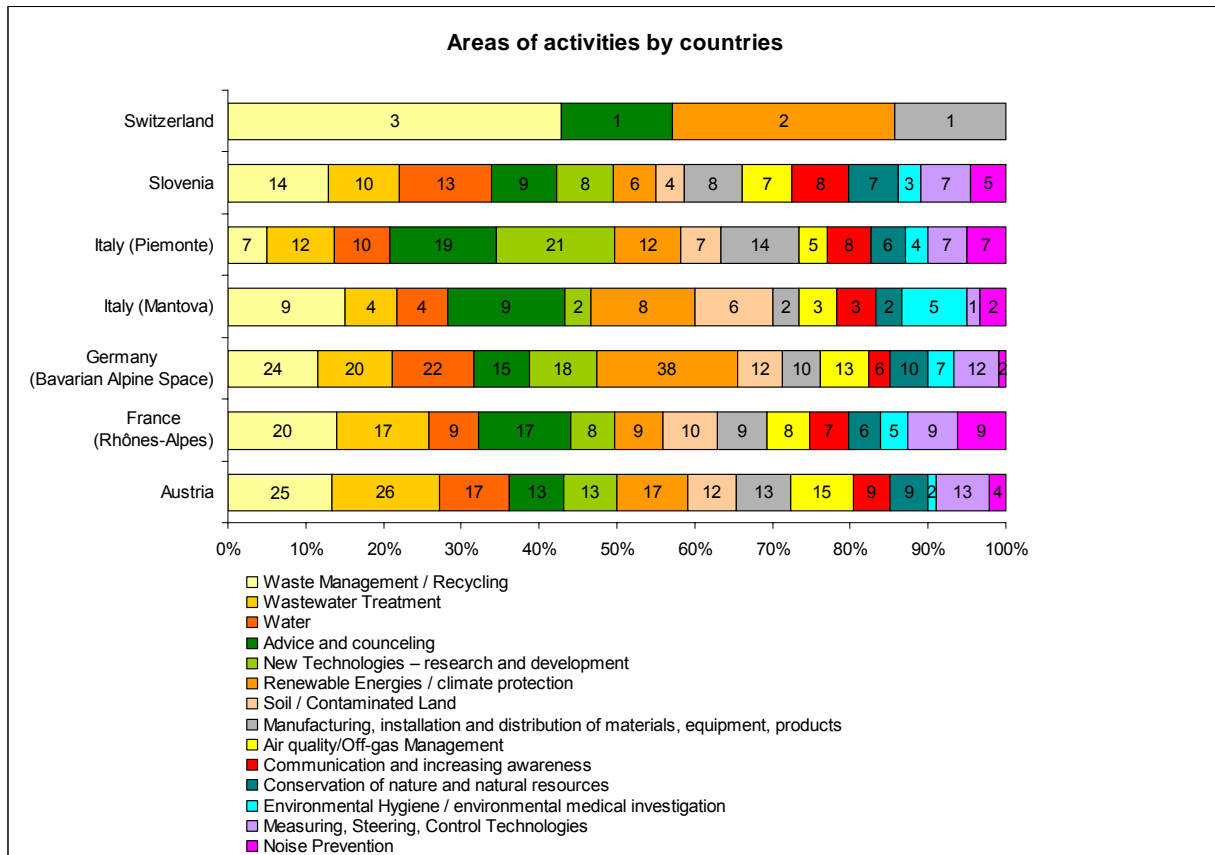


Table 15: Areas of activities by country ⁷

⁶ Multiple answers were permitted.

⁷ see explanation of graphical illustration in footnote on page 17.

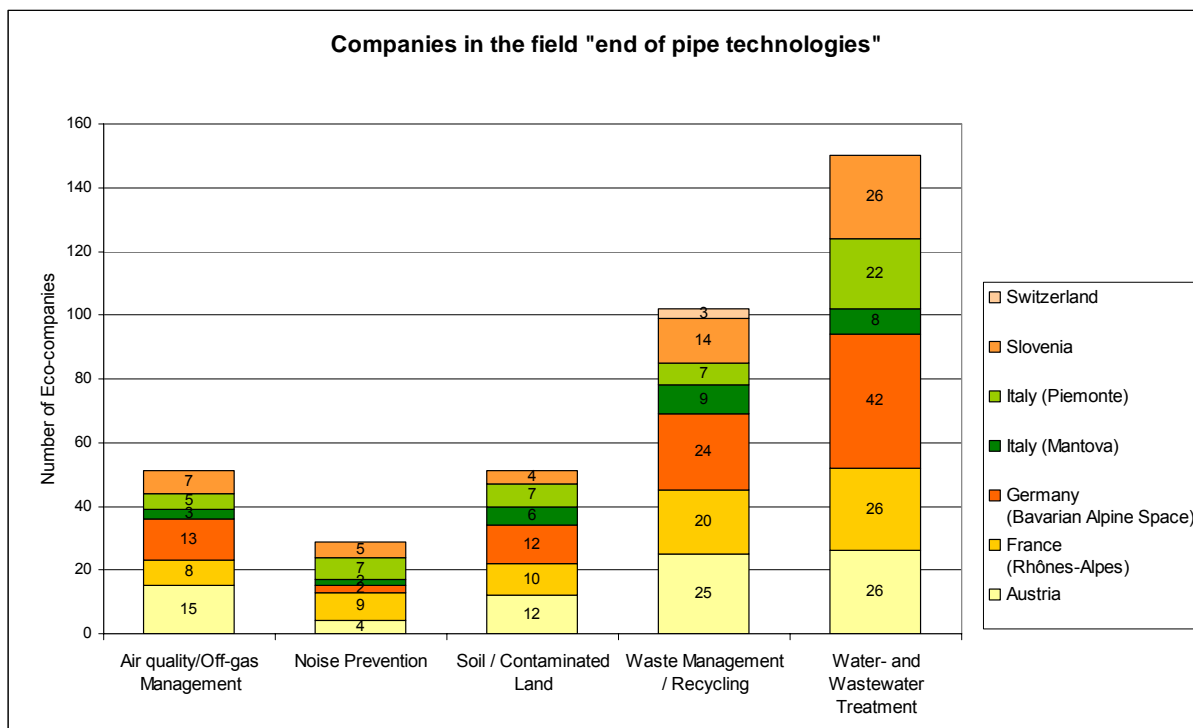


Table 16: Eco-companies in the field “end of pipe technologies”

In the field “end of pipe technologies” most of the companies work in the sector “Waste Management” and “Recycling”.

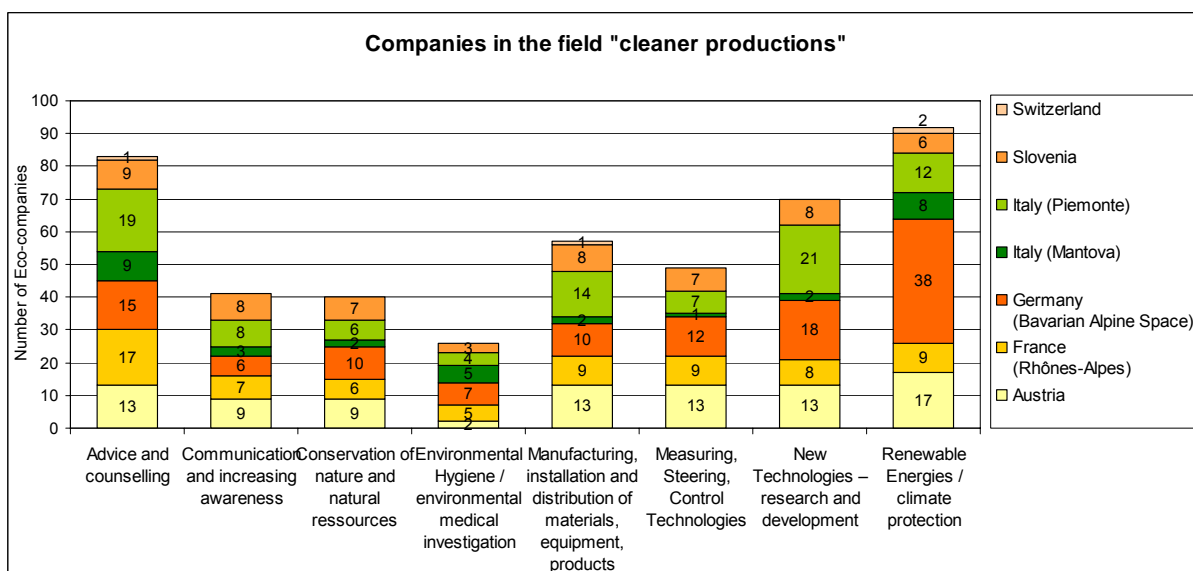


Table 17: Number of companies in the field “cleaner production”

In the field “Cleaner production” quite a view Eco-companies are working within the area of renewable energies/climate protection. Especially in Bavarian Alpine Space activities in the field of “renewable energies / climate protection” play a significant role.

3.3 Networks, Cooperations and Support

Question: In which networks is your company active? With whom do you have an exchange of experiences? Where do you get information from? ⁸

This question was to give indications about the major cooperation lines of Eco-companies and regional, national and international support structures. In some cases over all participating regions the results show quite some differences in the degree of cooperation of Eco-companies and their support institutions and networks.

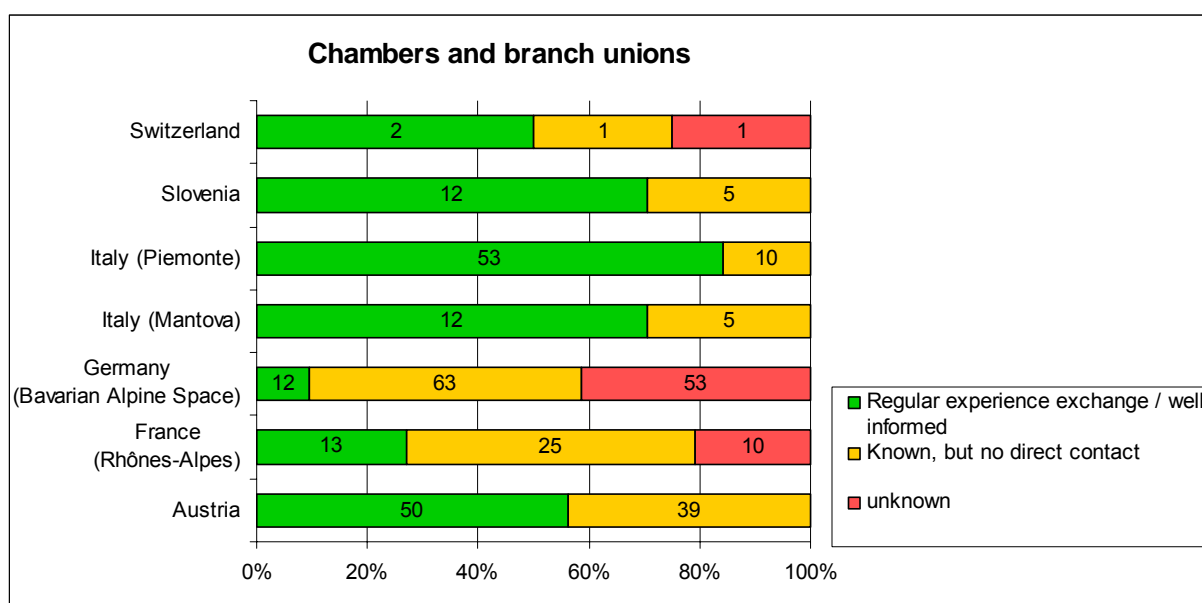


Table 18: Chambers and branch unions

The level of collaboration between the Eco-companies and the chambers and branch unions is quite different in the various countries of Alpine Space. Whereas in Switzerland, Slovenia, Italy and Austria more than 50% of all respondents have regular contact and feel well informed, in France and Germany (Bavarian Alpine Space) only 10 % have regular exchange of experiences and feel well informed. Especially chambers and branch unions of Italy seem to have a good business relationship with their Eco-companies.

⁸ No answering option “unknown” in Italy (Mantova and Torino) and Austria

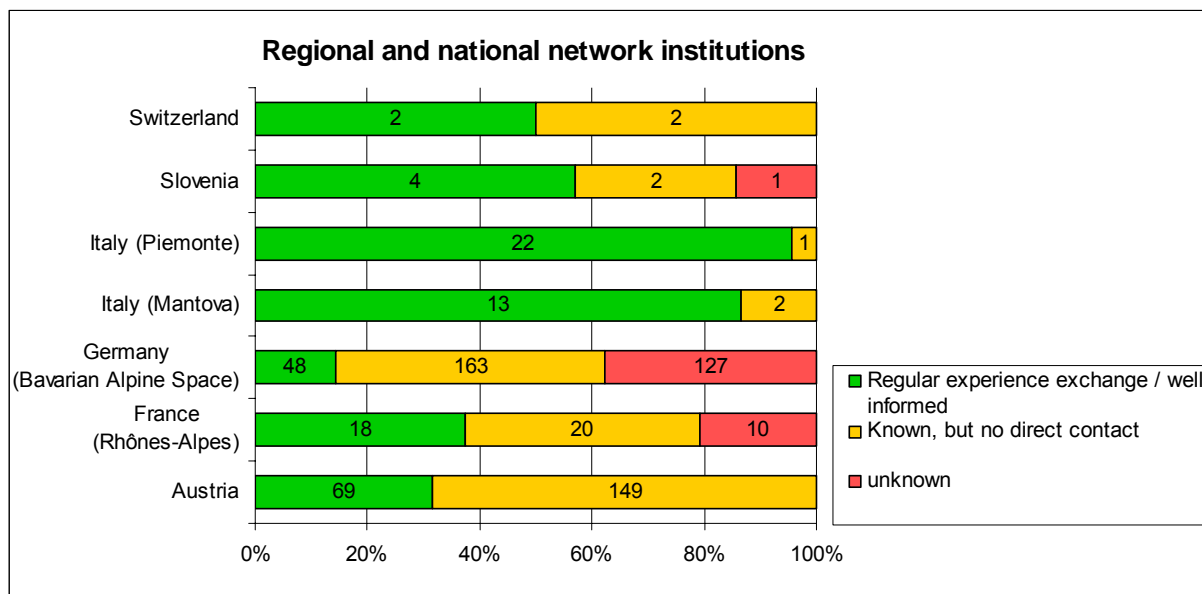


Table 19: Regional and national network institutions

Italian Eco-companies feel well informed by regional and national network institutions. More than 90% of the companies in Torino and about 85% in Mantova closely work together with regional and national network institutions.

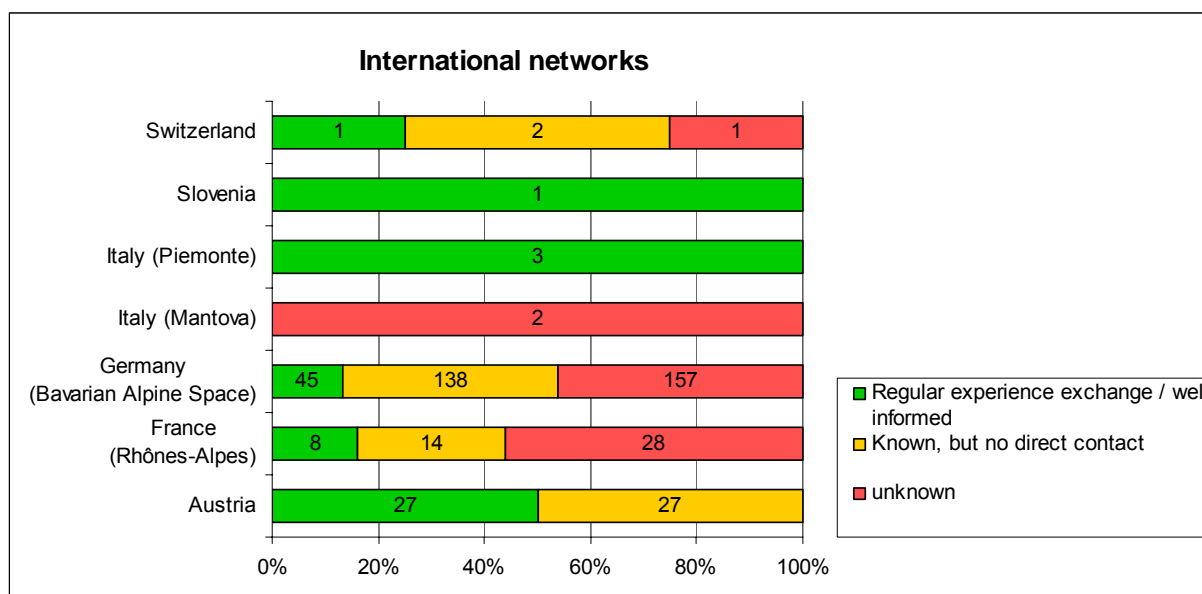


Table 20: International networks

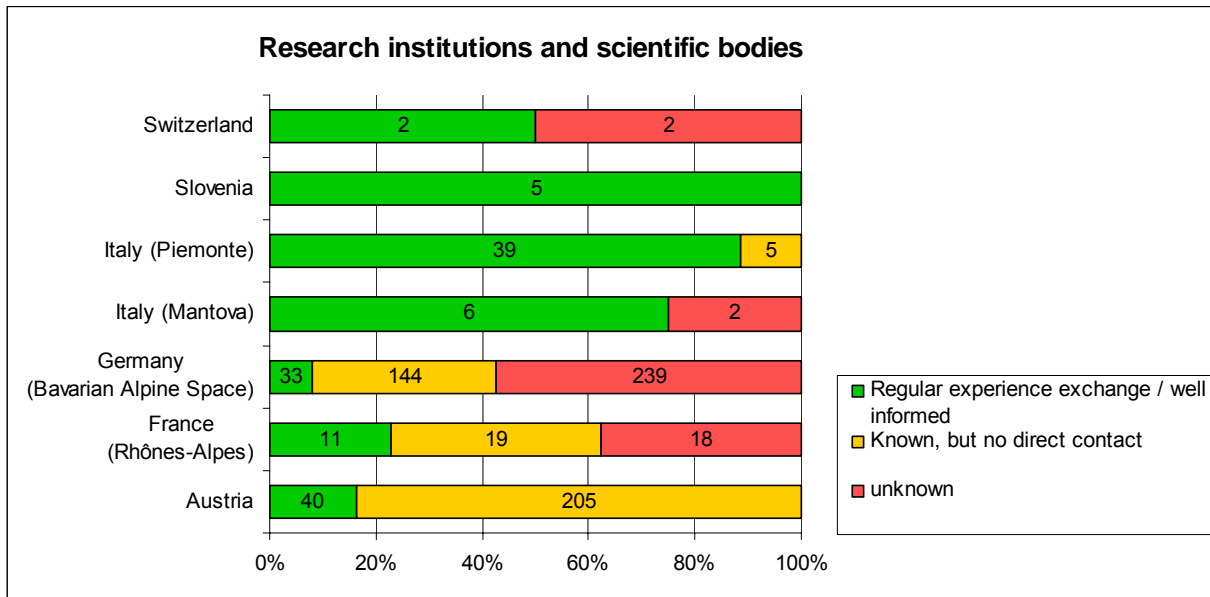


Table 21: Research institutions and scientific bodies

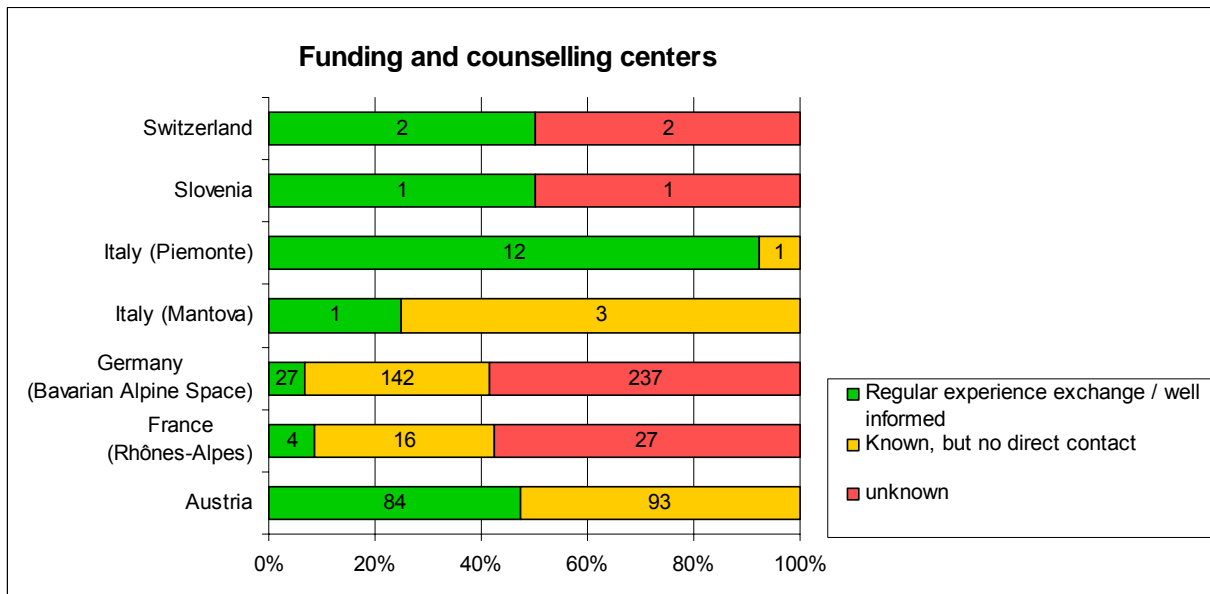


Table 22: Funding and counselling centers

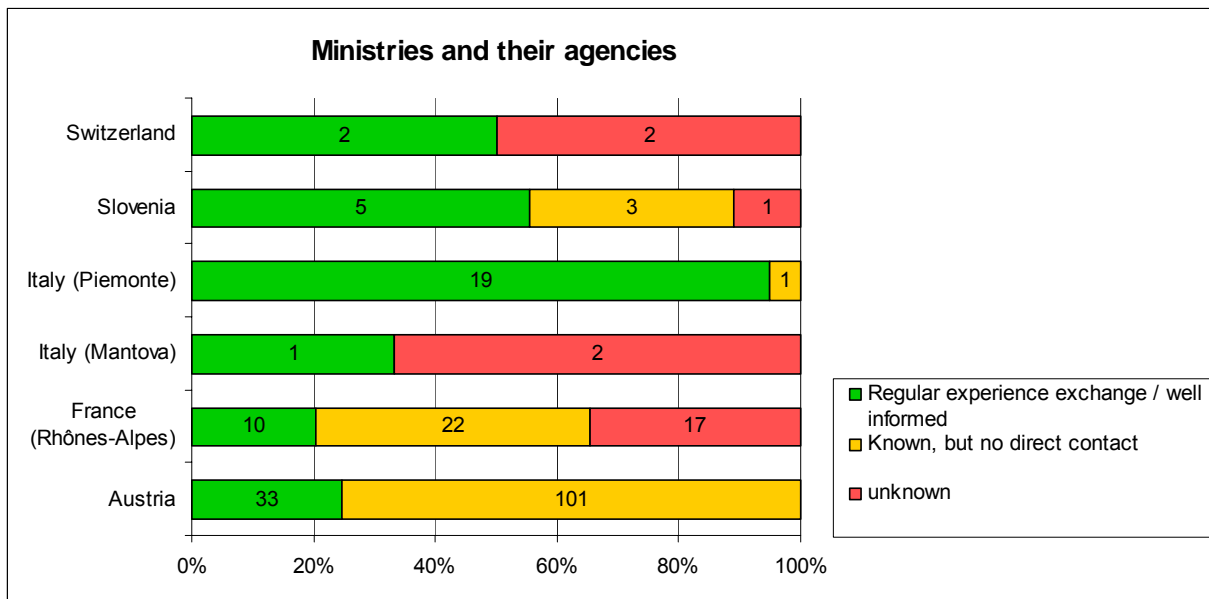


Table 23: Ministries and their agencies

3.4 Internationalisation and export activities

3.4.1 Activities with foreign countries

Question: How do you perform activities in foreign countries? ⁹

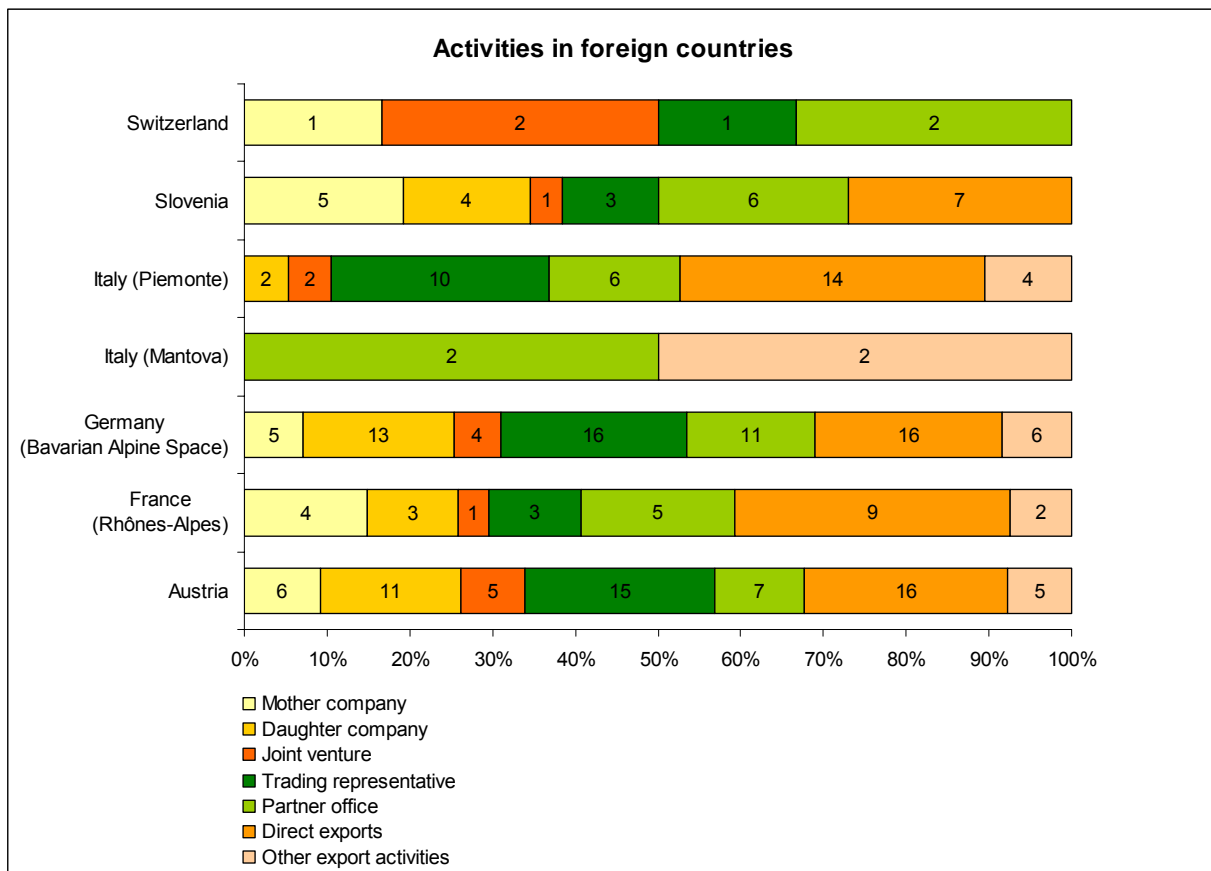


Table 24: Activities in foreign countries ¹⁰

The type of activities with other countries is quite different from region to region. Even if there is no clear trend, direct exports seem to be one of the main activities with foreign countries.

⁹ Multiple answers were permitted.

¹⁰ see explanation of graphical illustration in footnote on page 17.

3.4.2 Target areas for future international activities

Question: What target areas would you prefer for future international activities of your company? ¹¹

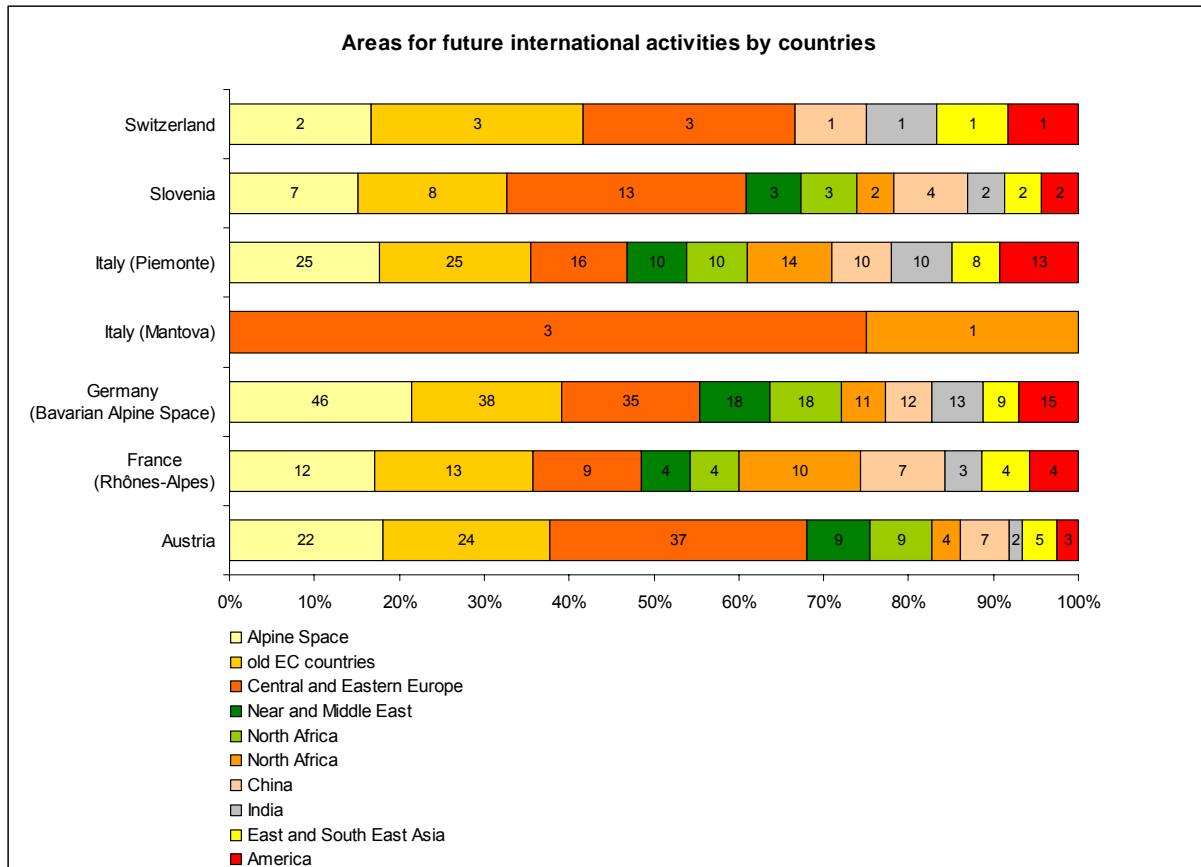


Table 25: Areas for future international activities by country ¹²

¹¹ Multiple answers were permitted.

¹² see explanation of graphical illustration in footnote on page 17.

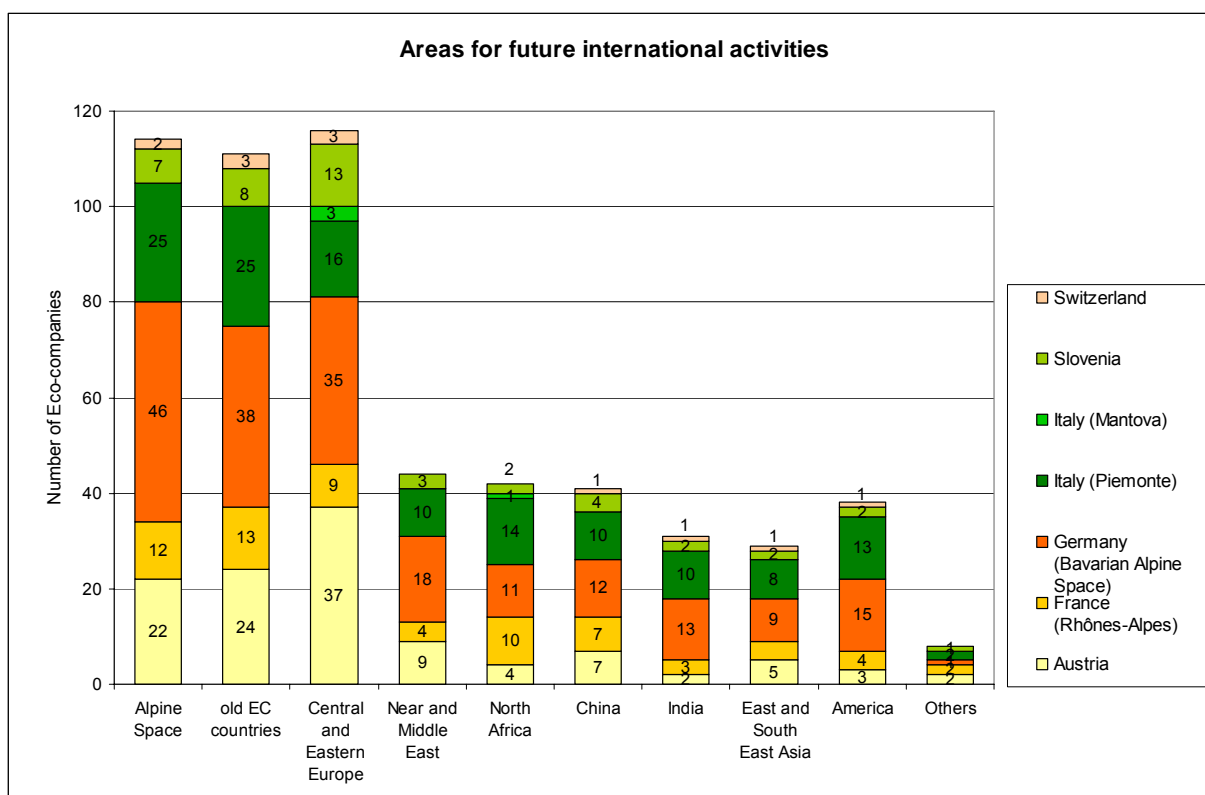


Table 26: Target areas for future international activities

Most responding Eco-companies see Europe, in particular Central and Eastern Europe with the new member states, as the most important future market. Especially for Austria Central Eastern Europe seems to be an important market, possibly due to their direct geographically neighbourhood.

Compared to the actual markets (see chapter 3.2.5), table 27 points out, that Eco-companies in Alpine Space expect more export trade in the future. While about 16% of all companies already run international sales, more than 30 % of the companies intend to position themselves in international markets in the future.

3.5 Research and Development – Innovation

3.5.1 Organization of innovation management and research

Question: How is innovation management and research organized in your company? ¹³

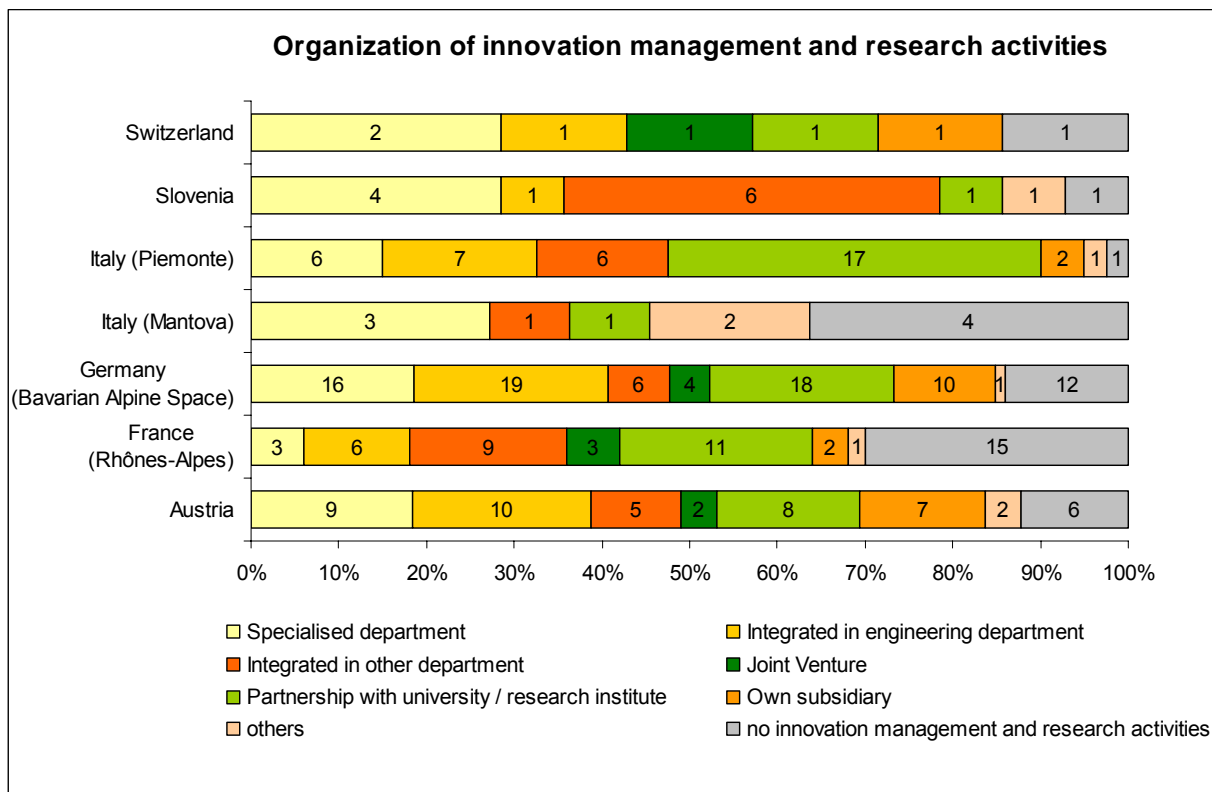


Table 27: Organization of innovation management and research activities ¹⁴

¹³ Multiple answers were permitted.

¹⁴ see explanation of graphical illustration in footnote on page 17.

3.5.2 Types of cooperation in the field of research and development (R&D)

Question: What types of cooperation in the field of research and development (R&D) do you have? ¹⁵

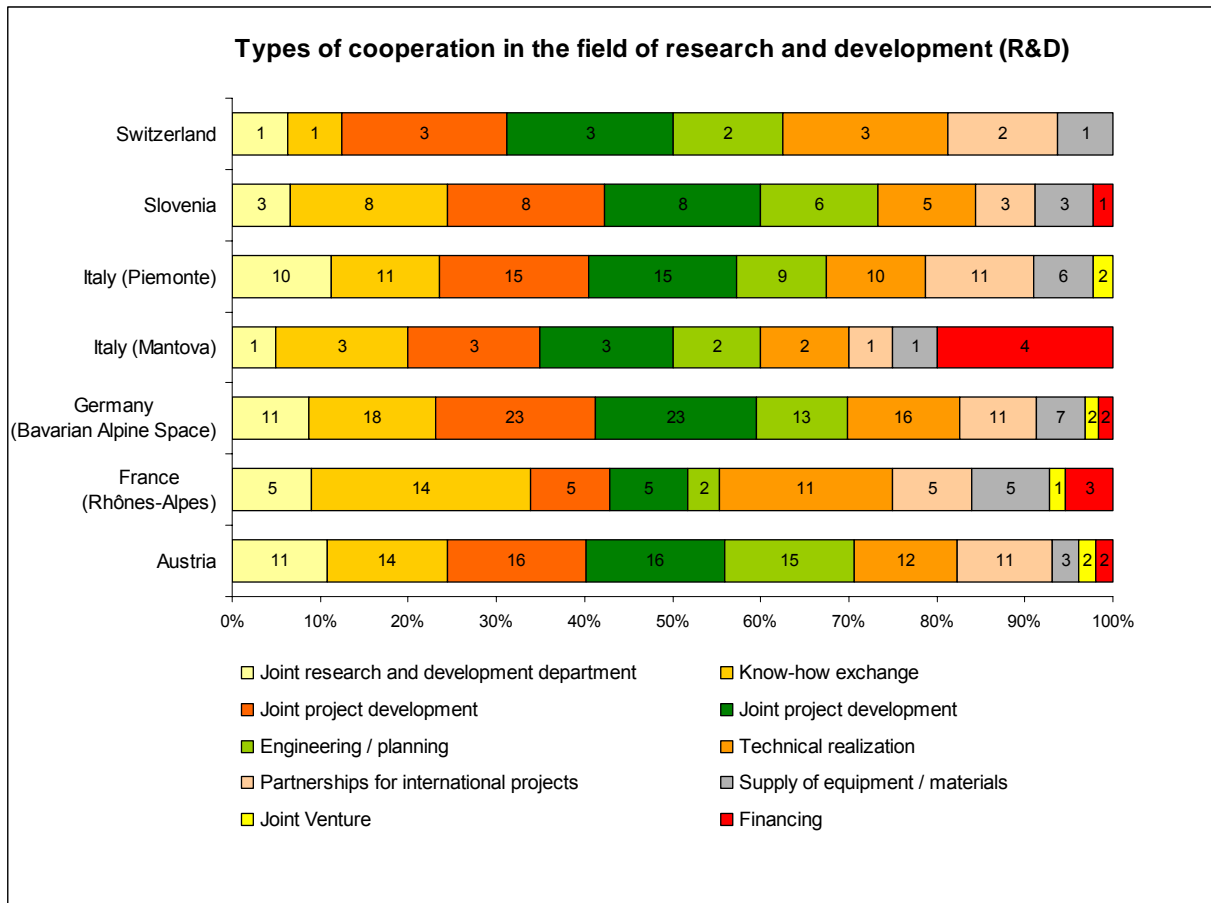


Table 28: Types of cooperation in the field of research and development (R&D) ¹⁶

To a large extent, Eco-companies are engaged in cooperation related to research and development with different kind of partnerships. The answers are evenly distributed on all types.

Only a minority of the respondents engaged in research and development don't have cooperation and partnerships.

¹⁵ Multiple answers were permitted.

¹⁶ see explanation of graphical illustration in footnote on page 17.