

Supply-Side-Survey

Report on sectors/barriers matrix results

2012-11-12

The research and the report were conducted by:



Република Србија
МИНИСТАРСТВО ЕНЕРГЕТИКЕ,
РАЗВОЈА И ЗАШТИТЕ ЖИВОТНЕ СРЕДИНЕ



Table of contents

1	Objectives of the survey.....	6
2	Methodology	6
3	The companies involved in the survey	7
4	Results of the Supply-Side-Survey.....	12
4.1	Importance of Energy Efficiency in public purchases	12
4.2	Overall barriers and support for participation in public tenders.....	14
4.3	Barriers and support for the sale of energy efficient solutions	19
4.4	Role of centralized procurement and e-bidding	31
5	Summary of the main results	36

Appendix: Questionnaire

List of Figures

Fig. 1: Numbers of companies from the different sectors included in the survey	7
Fig. 2: Sectors, the companies that took part in the survey came from	8
Fig. 3: Numbers of companies of different sizes included in the supply-side-survey.....	9
Fig. 4: Size and sectors of the companies included in the supply-side-survey.....	9
Fig. 5: Size of the construction companies included in the supply-side-survey	10
Fig. 6: Number of companies with different portions of their sales being made with ee solutions.....	10
Fig. 7: The ways most common to the companies to take part in public contracts.....	11
Fig. 8: Number of companies with different percentages of sales made with public authorities.....	11
Fig. 9: Importance of Energy Efficiency in public purchases according to the companies	12
Fig. 10: Importance of Energy Efficiency in public purchases in the four sectors.....	13
Fig. 11: Importance of barriers for the participation in public tenders	14
Fig. 12: Importance of barriers for the participation in tenders divided by sectors.....	15
Fig. 13: Importance of barriers for the participation in tenders divided by the size of the company	15
Fig. 14: Importance of barriers for the participation in tenders for construction-companies	16
Fig. 15: What companies would need to support their participation in public tenders	17
Fig. 16: What companies from a specific sector would need to support their participation in tenders .	18
Fig. 17: What companies of different sizes would need to support their participation in tenders	18
Fig. 18: What construction-companies would need to support their participation in tenders	19
Fig. 19: Number of companies per country that didn't work for public authorities	19
Fig. 20: Why some companies didn't sell their solutions to public authorities	20
Fig. 21: Why companies were not successful in selling ee solutions to public authorities	20
Fig. 22: Why companies in different sectors weren't successful in selling their ee solutions	21
Fig. 23: Why companies of different sizes weren't successful in selling their ee solutions	21
Fig. 24: Why companies with different percentages of their sales being made with ee solutions weren't successful with their energy efficient solutions.....	22
Fig. 25: Why companies were successful in selling their ee solutions to public authorities	23
Fig. 26: Why companies in the different sectors were successful in selling their ee solutions	24
Fig. 27: Why companies of different sizes were successful in selling their ee solutions	24
Fig. 28: Why companies with different portions of their sales being made with ee solutions were successful.....	25
Fig. 29: Why companies that sold different percentages of their sale to public authorities were successful.....	25
Fig. 30: What could support companies in selling their ee solutions to public authorities	26

Fig. 31: Sector-specific suggestions how to support companies in selling their ee solutions	27
Fig. 32: Size-specific suggestions how to support companies in selling their ee solutions	27
Fig. 33: Support offered in each of the countries to companies to sell their ee solutions	28
Fig. 34: Support offered in each of the sectors to companies to sell their ee solutions	29
Fig. 35: Support offered to companies of different sizes to sell their ee solutions	29
Fig. 36: Support offered to companies to sell their ee solutions	30
Fig. 37: Role of centralized procurement	31
Fig. 38: Sector-specific answers: Role of centralized procurement.....	32
Fig. 39: Size-specific answers: Role of centralized procurement.....	33
Fig. 40: Role of centralized procurement according to the ways the companies sold their solutions ...	33
Fig. 41: Role of centralized procurement according to percentage of the sale the company made directly with public authorities.....	34
Fig. 42: Could e-bidding support the sale of energy efficient solutions.....	34
Fig. 43: Were the companies prepared to offer a warranty for their ee solutions	35

List of tables

Tab. 1: Barriers/sectors-matrix	39
Tab. 2: Barriers/company-size-matrix	39

1 Objectives of the survey

In the course of the EFFECT project a “Supply side survey on the basis of the barriers/sectors matrix” (activity 3.4 in Work Package 3) was undertaken. According to the Application Form (AF), the aim of the activity was to investigate and draft a detailed analysis on the barriers and constraints faced by the supply side (private sector) in the participation in EEPF tenders. The aim of the analysis actually undertaken had a slightly different focus: Instead of investigating the barriers the supply side faces when participating in energy efficient public tenders, the **barriers the supply side faces when trying to sell their energy efficient solutions to public authorities were investigated**. With this slight shift in focus, we included a broader range of experiences – not only the experiences that were made in energy efficient tenders but also in conventional ones. Furthermore, not only tenders but also direct awards and subcontracts were included.

This report highlights the main problems and barriers that companies in the SEE-region face when trying to sell their energy efficient solutions to public authorities. The report also highlights possible solutions for these barriers offered by the supply side. The barriers will be the basis for further activities foreseen for the supply side in Work Package 5 (led by CRES).

2 Methodology

The supply side survey was conducted with the help of a questionnaire (see appendix) that was filled in by the interviewer during telephone interviews or face-to-face-interviews. The larger part of the questionnaire consisted of “closed questions” which offered given answers. Most of these closed questions also offered the possibility to state further individual answers. Furthermore, some of the questions were “open” which means that they did not offer given answers. The interviewers had clear guidelines not to interfere during the interview, especially when asking the open questions.

Usually, the questionnaire was sent to the interviewees in advance to make sure that the information needed was available during the interview (like for example the number of employees).

The answers from most of the companies that took part in the survey were analysed together. In the following chapters, a quantitative and qualitative analysis is given for the closed questions, as well as for the open questions. Due to the limited number of companies that were included in the questionnaire in each country, the quantitative results cannot be seen as representative. Nonetheless, they offer valuable information about barriers and possible solutions to overcome them.

In each of the eight countries that participate in the EFFECT-project between 7 and 15 interviews were conducted. Interviews were conducted with 103 companies, 9 of these interviews (1 from Austria, 2 from Bulgaria, 4 from Romania and 2 from Hungary) were not included in the analysis, because the companies that were interviewed did not offer energy efficient solutions or were not interested in selling their solutions to public authorities without offering an explanation. The results described below are based on the interviews with 94 companies.

More than 150 companies were contacted and asked whether they would take part in the survey.

3 The companies involved in the survey

The survey is based on the answers of 94 companies from the 8 SEE-countries Austria, Bulgaria, Greece, Hungary, Italy, Romania, Serbia and Slovenia. The companies can be classified into the sectors *construction* (buildings as well as infrastructure), *lighting*, *ICT*, *transportation* and *others* (health sector, etc.). The following figure shows the number of companies from the different sectors included in the survey.

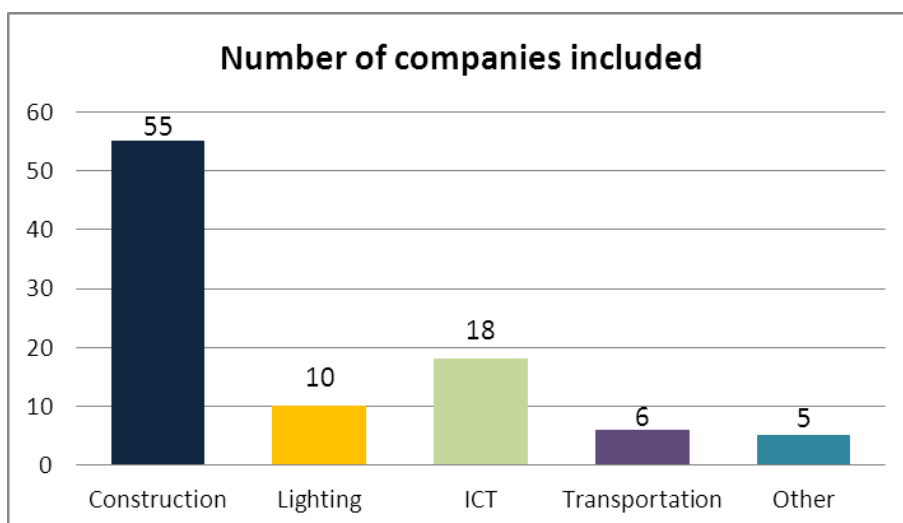


Fig. 1: Numbers of companies from the different sectors included in the survey

More than half of the interviews were conducted with companies from the construction sector. 18 interviews were conducted with companies from the ICT-sector, 10 with companies from the lighting-sector and 6 with companies from the sector transportation. The companies offered energy efficient solutions in form of products, services and/or works, for example:

Energy efficient solutions in the construction sector:

- Design of passive houses (architects)
- Energy efficient HVAC-systems (companies that offer building services)
- Solar heating systems
- Study and implementation of insulation made of renewables
- Consulting about energy contracting and about financing solutions
- Windows with high insulation

Energy efficient solutions in the ICT sector:

- Energy efficient multifunctional devices
- Design of energy efficient computer centres

Energy efficient solutions in the lighting sector:

- LED-lighting
- Solar lighting for municipalities
- Study about the costs of changing the lighting in buildings

Energy efficient solutions in the Transportation sector:

- Cars with a hybride or electric drive
- EEV (*enhanced* environmentally friendly vehicles) buses

Figure 2 shows for each country the number of companies from the four sectors included in the survey. The figure also includes the 5 interviews with companies from “other” sectors (health care, etc.) as well as the 9 companies were the interviews were not included in the analysis (see above).

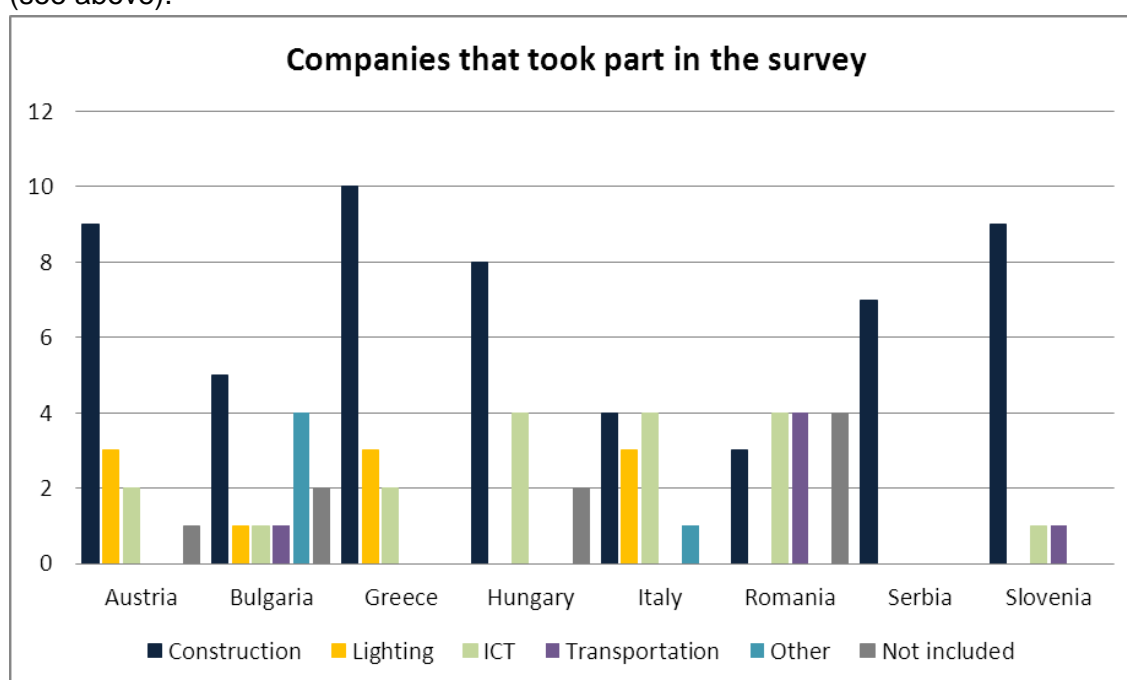


Fig. 2: Sectors, the companies that took part in the survey came from

In each of the eight countries, companies from the construction sector were interviewed. Their number was especially high in Austria (9), Greece (10), Hungary (8), Serbia (7) and Slovenia (9). In almost every country (except of Serbia), companies from the ICT-sector took part in the survey. The companies from the lighting sector included in the survey were only situated in Austria, Bulgaria, Greece and Italy. Companies from the transportation sector were situated in Bulgaria, Romania and Slovenia.

Figure 3 shows the number of micro companies (less than 10 employees), small companies (less than 50 employees), medium companies (less than 250 employees) and big companies (250 employees and more) included in the survey.

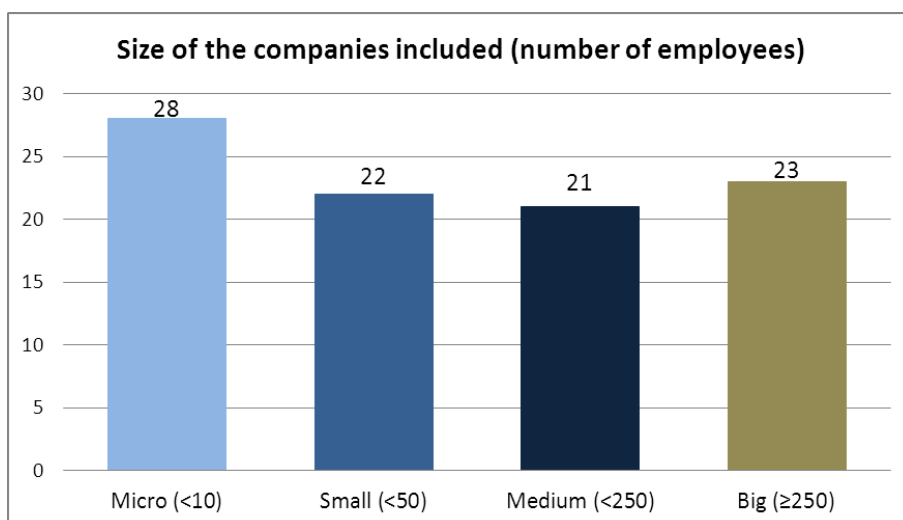


Fig. 3: Numbers of companies of different sizes included in the supply-side-survey

While most of the interviewed companies are companies from the construction sector, the number of different sized companies included in the survey can be seen as balanced with a slight majority of micro-sized companies.

The size of the companies from the different sectors – construction, lighting, ICT, transportation and other (health sector etc.) – is shown in figure 4.

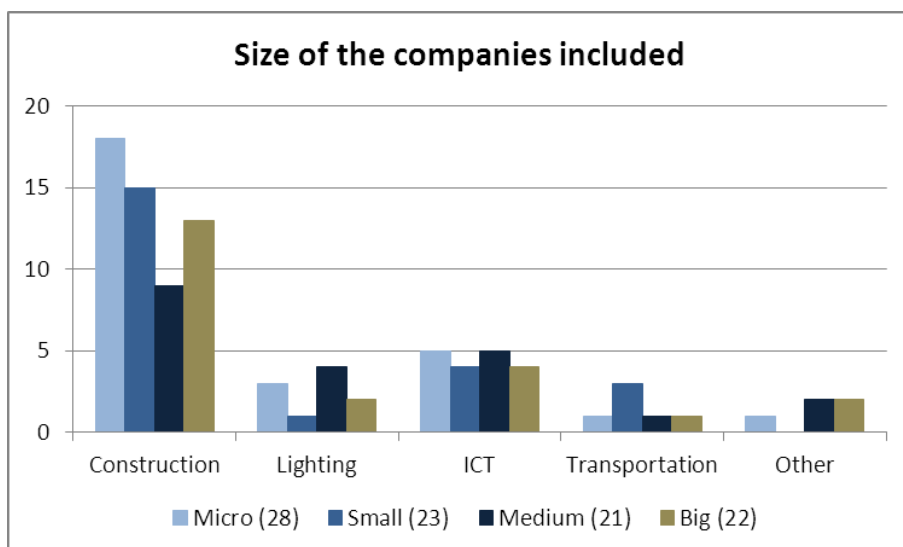


Fig. 4: Size and sectors of the companies included in the supply-side-survey

Figure 4 shows that even if the number of companies of different sizes isn't always balanced – especially in the construction sector where 22 medium and big companies versus 33 micro and small companies took part in the survey – there is a considerable number of companies from each size included in the survey.

If we take a look at the size of construction companies that took part in the survey in the different countries (see figure 5), the distribution can only be seen as balanced in Austria, Italy, Serbia and Slovenia. In Greece, Hungary and Romania mostly micro and small companies took part, while in Bulgaria only medium and big companies were interviewed.

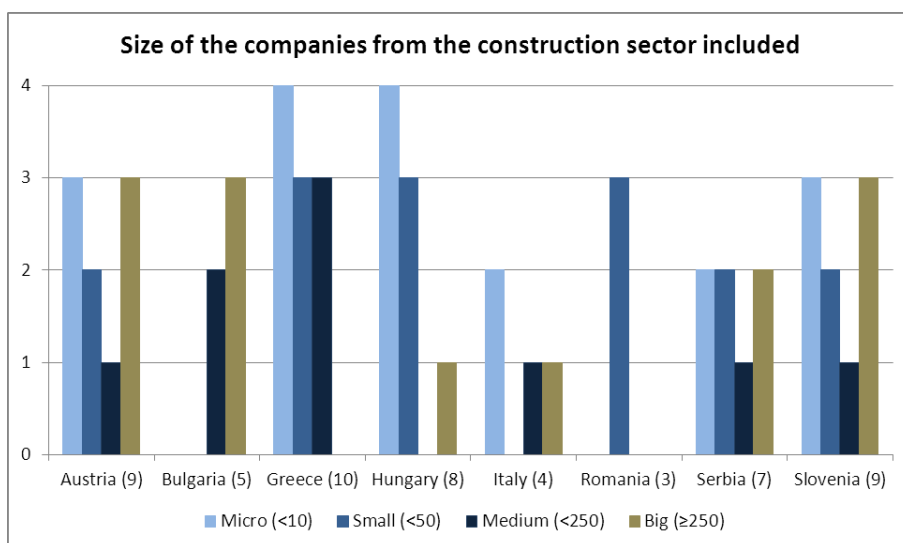


Fig. 5: Size of the construction companies included in the supply-side-survey

In figure 6, the companies that filled in the questionnaire are divided according to the portions of their sales they made with energy efficient (ee) solutions. The figure is nearly balanced: 30 companies sold almost only energy efficient solutions, while 28 companies sold mostly conventional solutions. A considerably smaller number of companies lies in between.

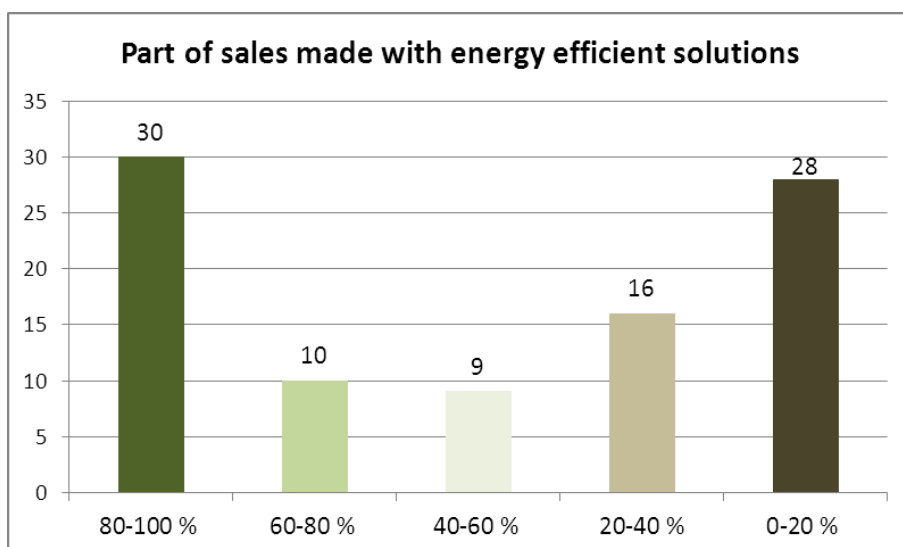


Fig. 6: Number of companies with different portions of their sales being made with ee solutions

When being asked about how they take part in public contracts, most of the companies said that they would mostly take part in “National tenders”, in “National, regional and local tenders”, in “Regional and local tenders”, in “Direct awards” or as a “Subcontractor”. Some companies said that they do not sell their solutions to public authorities. Figure 7 shows the number of companies included in the survey for each of the different ways to take part in contracts. A relatively high number of companies sold their solutions in “Regional and local tenders” while the number of companies that sold their solutions in “Direct awards” was quite small.

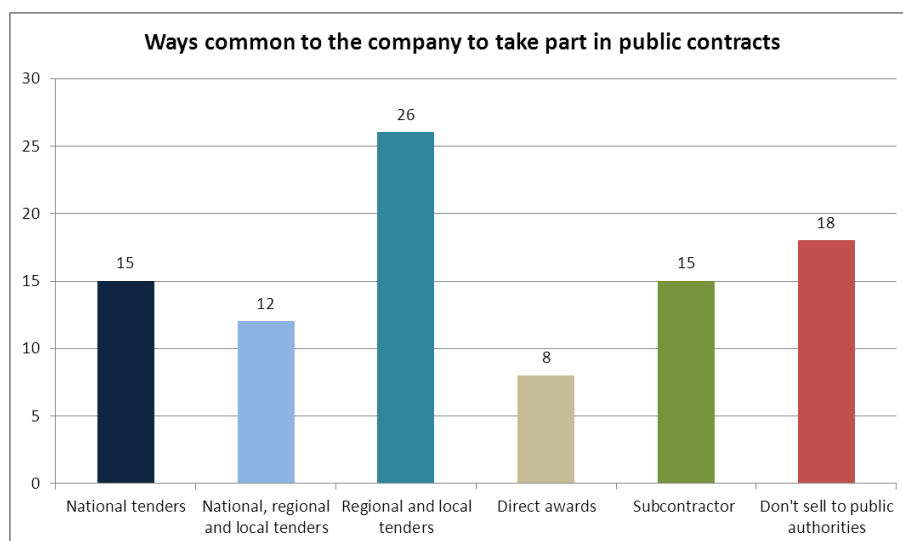


Fig. 7: The ways most common to the companies to take part in public contracts

The companies were also asked about the percentage of their sales they made directly with public authorities (see fig. 8). Among those companies that offered and answer to the question, eight companies sold between 70-100 % and eleven companies sold between 40-69 % of its sales directly to public authorities. That means that for a minor number of companies included in the survey, public authorities were the main customer.

31 companies included in the survey said that they would sell between 10-39 % directly to public authorities, further 40 companies said that they would sell between 0-9 % (many construction companies that work as subcontractors are part of this group).

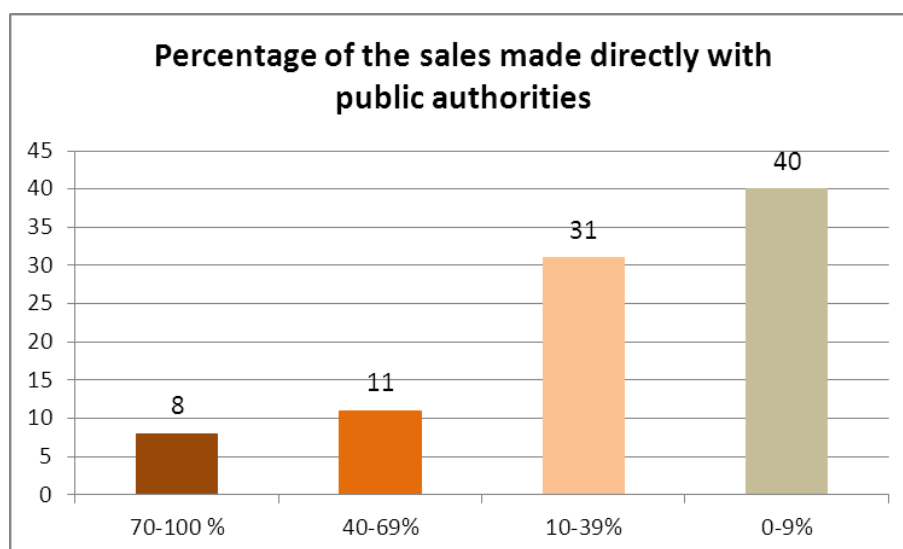


Fig. 8: Number of companies with different percentages of sales made with public authorities

According to these descriptions, the typical company included in the survey was a micro-sized Greek company situated in the construction sector that made 80-100 % of its sale with energy efficient solutions, took part in regional tenders and sold 0-9 % of its total sales to public authorities.

4 Results of the Supply-Side-Survey

In the following chapter, the results of the supply-side-survey are presented. It is important to keep in mind, that it is *the perception of the companies* that is presented and that the results cannot be seen as representative.

Subchapter 2.1 offers information about how the companies perceive the *importance of energy efficiency in public purchases*.

Subchapter 2.2 offers information about the *overall barriers for companies to take part in public tenders*. It also offers suggestions for necessary changes.

Subchapter 2.3 is about the *barriers that companies experience when offering their energy efficient solution to public authorities*. It shows the perspective of companies that did not sell their energy efficient solutions to public authorities, of companies that are not successful in selling their energy efficient solutions to public authorities and companies that are successful in doing so. It also shows from the perspective of the companies what kind of support is offered to them and what kind of support they would need to sell more of their solutions to public authorities.

Subchapter 2.4 offers information about the perceived *role of centralized procurement and e-bidding* for the sale of energy efficient solutions. It also offers information if the companies are prepared to offer a warranty for their energy efficient solutions.

4.1 Importance of Energy Efficiency in public purchases

The companies were asked the following question: “*From your point of view, how important is the topic “energy efficiency” in public purchases in the last 3 years*”. Figure 9 shows the results.

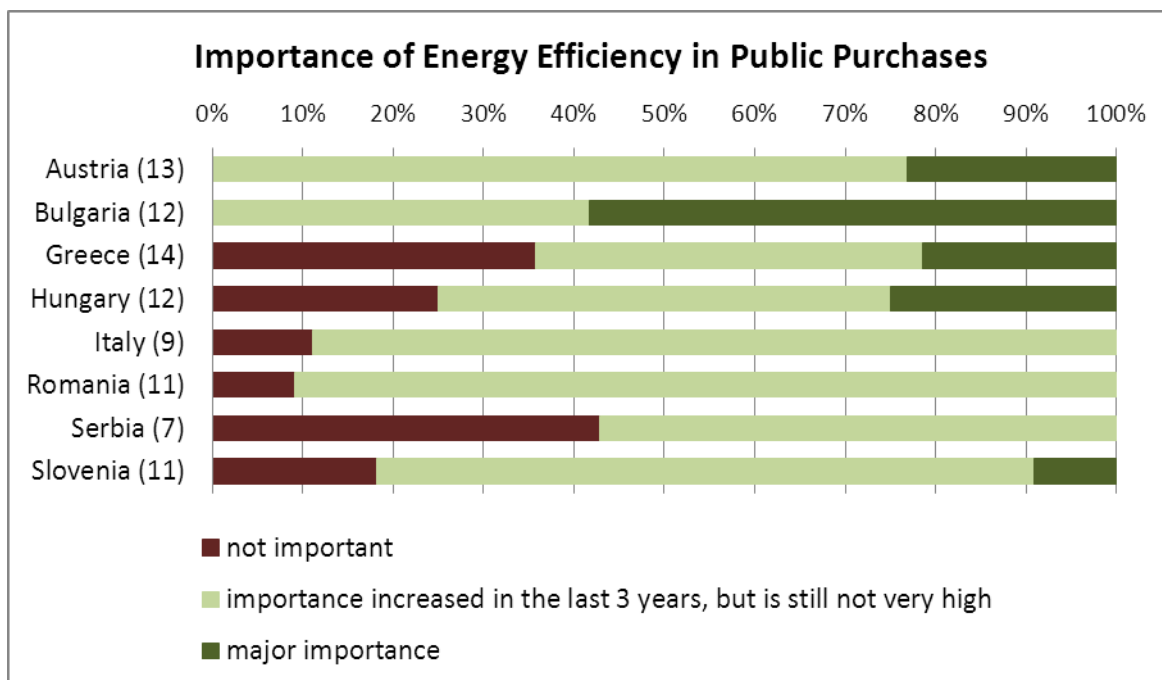


Fig. 9: Importance of Energy Efficiency in public purchases according to the companies

The figure offers the number of companies that answered to this question in brackets behind the name of the country. The figure shows that no company in Austria and Bulgaria had the impression that Energy Efficiency was not important in public purchases. Nearly 60 % of the Bulgarian companies stated that it was of major importance. In Greece, Hungary and Slovenia, the perception of the importance of Energy Efficiency was diverse – some companies said that the topic is not important, others said that its importance increased but that Energy Efficiency was still not very important and a third group had the impression that the topic is of major importance. In Italy, Romania and Serbia, none of the companies had the impression that Energy Efficiency was of major importance.

The importance of Energy Efficiency in public purchases depends heavily on the framework conditions in the countries and is therefore country-specific. Nevertheless, the following figure shows how the companies of the four sectors perceived the importance of Energy Efficiency in public purchases. According to the figure, nearly a fifth of the companies in the sectors construction, ICT and transport had the impression that Energy Efficiency wasn't important in public purchases even if it is mandatory for public procurers in the EU to include Energy Efficiency when purchasing ICT (mandatory for national procurers according to the regulation for implementing the EU-US Energy Star programme in the EU, see IP/07/1943) and vehicles (according to the Directive 2009/33/EC of 23 April 2009 on the promotion of clean and energy-efficient road transport vehicles).

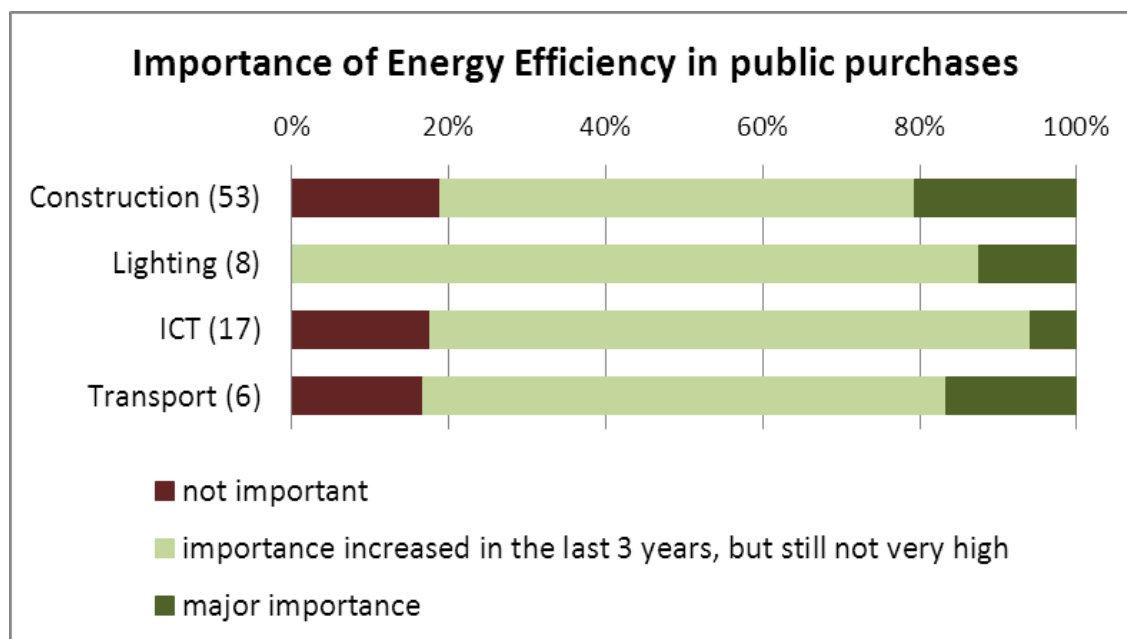


Fig. 10: Importance of Energy Efficiency in public purchases in the four sectors

4.2 Overall barriers and support for participation in public tenders

Some of the barriers for companies to take part in public tenders are not related to the energy efficiency of the solution that is going to be sold. These barriers rather apply to all companies irrespective of the environmental quality of their offer.

4.2.1 Barriers for the participation in public tenders

The companies were asked: “*What are the main difficulties you encounter when you participate in a public tender?*”. The following figure illustrates their answers. The figure shows that about 50 % of the companies in Austria, Bulgaria, Greece, Hungary, Italy, Romania and Slovenia said that the main barrier to take part in public tenders was the difficulty to invest the time to fill in the tender documents. In comparison, “being too small” was only perceived as a barrier for about 20 % of the companies in Bulgaria, Greece, Hungary, Italy and Slovenia. “Not having enough staff” was seen as a barrier for about 40 % of the Italian companies but only for about 20 % of the companies in Bulgaria, Hungary and Slovenia as well as for an even smaller number in Romania.

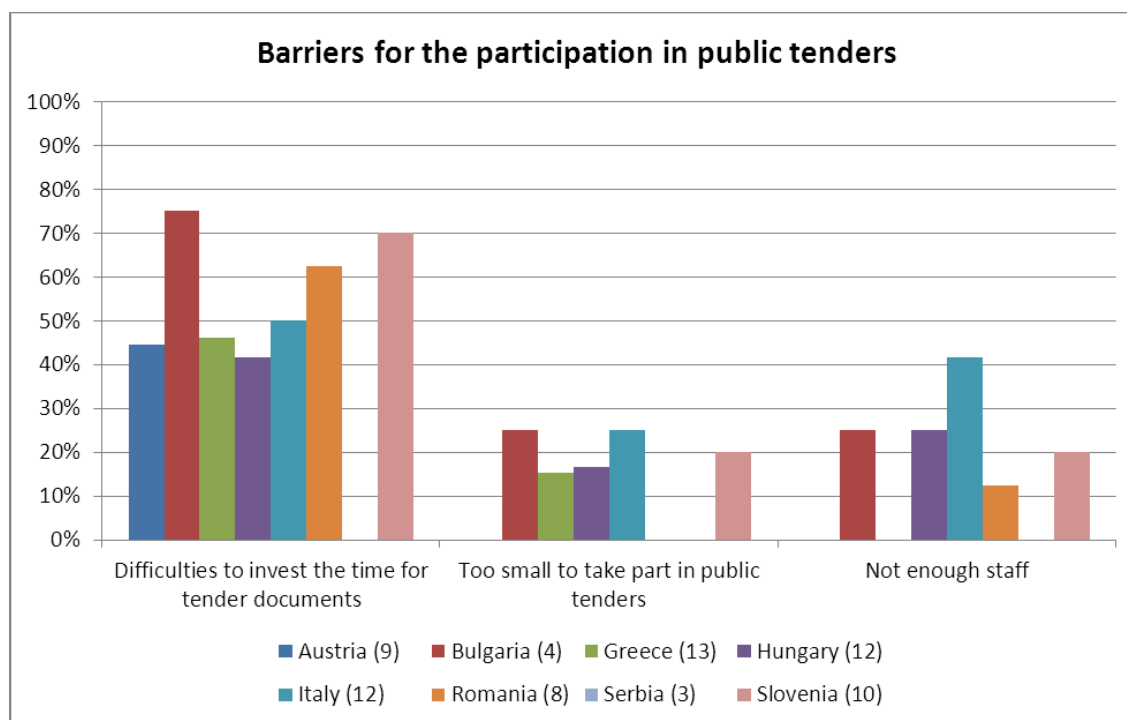


Fig. 11: Importance of barriers for the participation in public tenders

The overall picture doesn't change when we take a look at the sectors the companies come from. Figure 12 illustrates that the highest percentage of companies in each of the four sectors – between 40 % of the construction companies and 80 % of the transportation companies – said that the barrier “difficulties to invest the time for tender documents” was most important. “Being too small” was perceived as a barrier for about 20 % of the companies in the construction, the lighting and the ICT-sector.

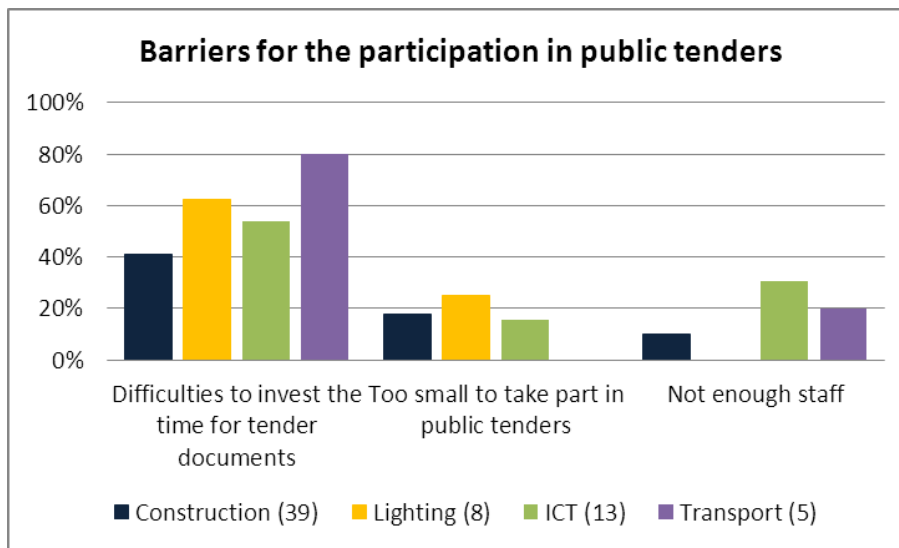


Fig. 12: Importance of barriers for the participation in tenders divided by sectors

Figure 13 shows the importance of the barriers according to the size of the company. Interestingly, the barrier “time that is needed to fill in the tender documents” applied to companies of all sizes, also for big companies. Nearly 40 % of the companies that had less than 10 employees (micro companies) said that they were too small to take part in public tenders.

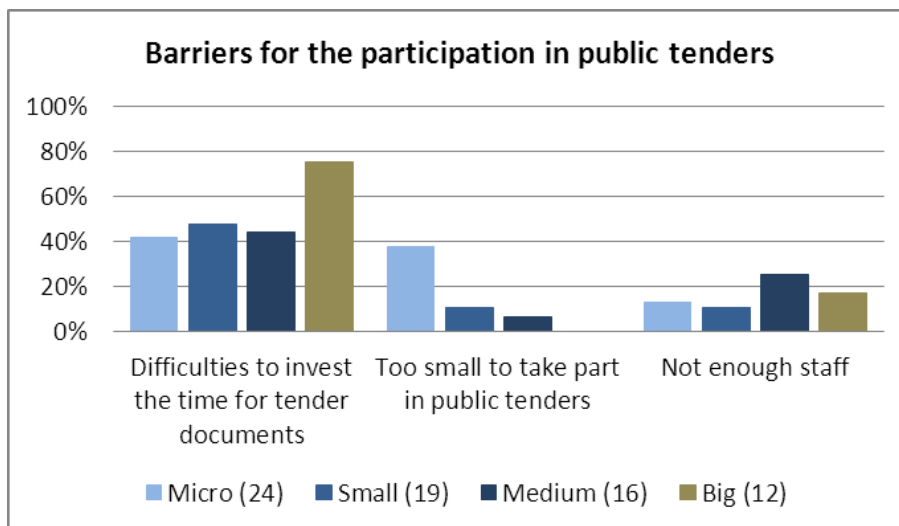


Fig. 13: Importance of barriers for the participation in tenders divided by the size of the company

Figure 14 shows the barriers that construction companies perceive when taking part in public tenders.

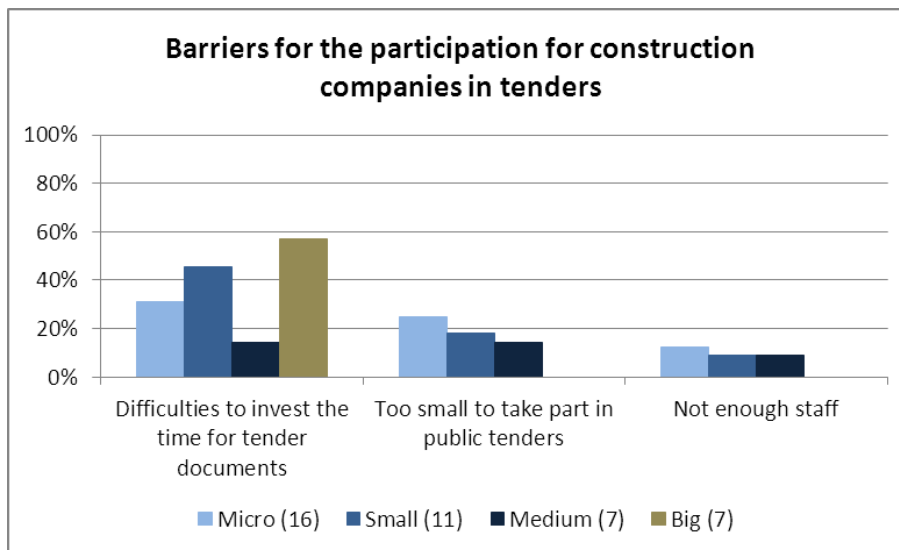


Fig. 14: Importance of barriers for the participation in tenders for construction-companies

A comparison between fig. 14 and 13 shows that for the companies in the construction sector the barrier “Difficulties to invest the time” was of minor importance compared to companies from the other sectors. In contrast, the amount of small and medium construction-companies that said that they were “too small to take part in public tenders” was higher compared to companies from other sectors.

Some of the companies also said that they didn’t have any problems when taking part in public tenders. Several companies offered further information about the main barriers they encounter, for example:

- The tendering procedure is very bureaucratic. Furthermore, it often differs from one public authority to the other. Taking part in a public tender procedure is therefore not only time consuming but also very costly for the companies.
- Sometimes, especially in the construction sector, the payment of public authorities is considered to be too late or in cases of economic crisis there doesn’t seem to be any payment at all (especially in the construction sector).
- Several companies complained about the lack of flexibility in the procurement process. Even if a better solution would be available, once the tender document is written and the contract is signed, there is only little space for changes.
- The lack of transparency and the existence of corruption (the term corruption is used very widely – it also covers cases where the tender documents are shaped in a way that the local company is going to be successful) seems to be a barrier in several countries.

4.2.2 Changes in the procurement process that could increase participation

When asked about their suggestions to simplify the procedure (*“Do you have suggestions for the simplification of the procedure?”*), the companies expressed the following views: Between 50-80 % of companies from Bulgaria, Greece, Hungary, Italy, Romania and Slovenia wanted the number of required documents to be reduced. This did not seem to be a topic for Austrian companies, possibly because there already are electronic platforms in Austria where companies can register and deposit their main documents and do not have to deliver them in the tendering procedure.

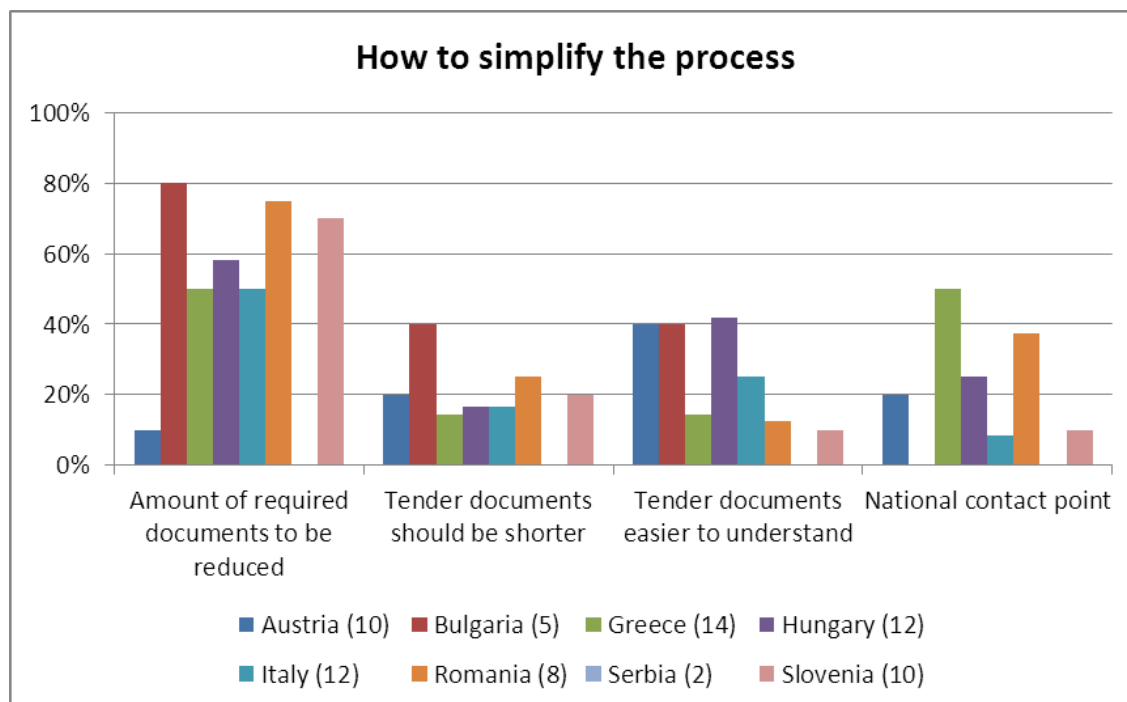


Fig. 15: What companies would need to support their participation in public tenders

About 40 % of companies from Austria, Bulgaria and Hungary suggested that the tender documents should be easier to understand. For the companies of the other countries, this didn't seem to be a major problem. Furthermore, only around 20 % of the companies said that the tender documents should be shorter. An interesting result is the need for a national contact point that supports companies in the tendering procedure. Most companies did not need such a contact point. The idea was only popular in Greece and Romania, where about 40-50 % of companies supported it.

The suggestions of companies from the four different sectors how to simplify the process are shown in following Figure 16.

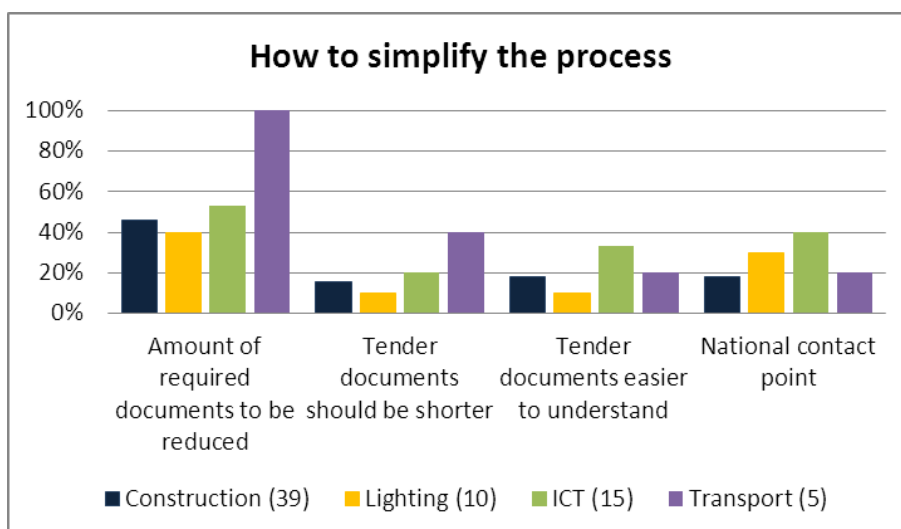


Fig. 16: What companies from a specific sector would need to support their participation in tenders

40 % or more of the companies in each sector suggested that the amount of required documents should be reduced. The reduction of the length of the tender documents was suggested only by a considerable number of companies in the transport sector while the improvement of the comprehensibility of tender documents was suggested only by a considerable number of companies in the ICT-sector. Furthermore, only a considerable percentage of companies from the ICT-sector supported the idea of a national contact point.

The following figure shows the suggestions made by the companies based on their size. The idea of a national contact point seemed to be more interesting for micro and small companies. Apart from that, the amount of documents or the size and comprehensibility did not seem to be more important for smaller companies than for bigger ones.

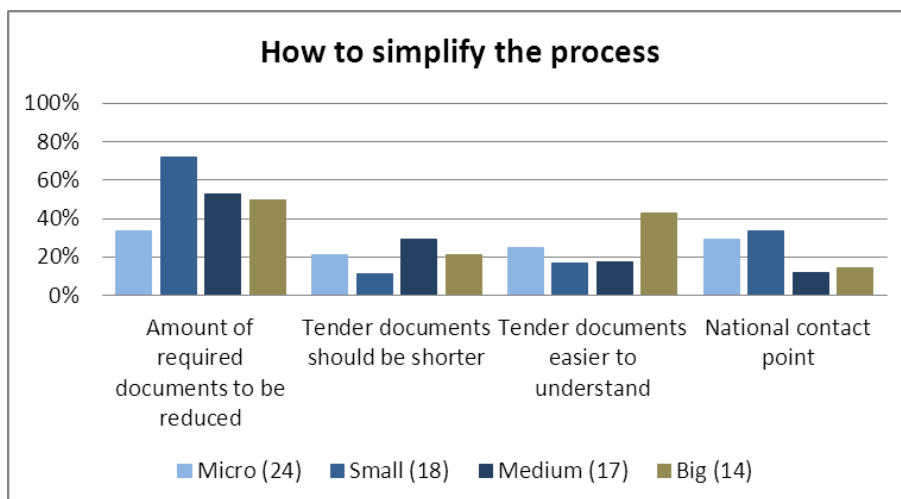


Fig. 17: What companies of different sizes would need to support their participation in tenders

Figure 18 shows the suggestions of construction companies for the simplification of the process according to their size. Among big companies the greatest number of supporters for the first three simplifications – reduction of required documents, reduction of tender documents and an increased comprehensibility of the tender documents – could be found. Furthermore, about 40 % of the small construction companies opted for a national contact point.

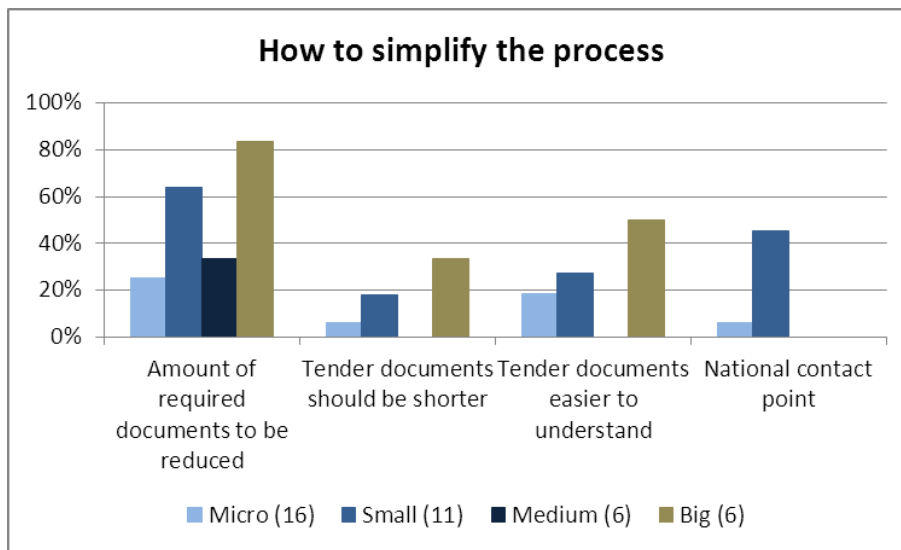


Fig. 18: What construction-companies would need to support their participation in tenders

4.3 Barriers and support for the sale of energy efficient solutions

4.3.1 Why companies don't offer their solutions to public procurers

Some of the companies involved in the survey said that they did not offer their energy efficient solutions to public procurers. Their number is shown in figure 19. Each of the Austrian companies that were interviewed worked for public authorities. In Hungary, Italy, Romania, Serbia and Slovenia, only one or two companies included in the questionnaire did not work for public authorities. A considerable number of Bulgarian and Greek companies said that they did not work for public authorities. This might be a coincidence, in the case of the Greek companies, it could be due to delays of payment as a result of the economic crisis especially in the construction sector.

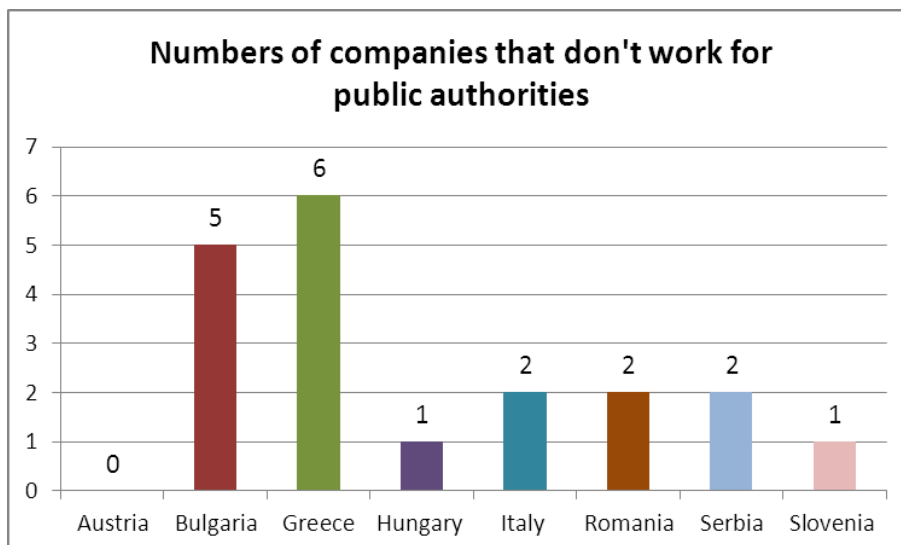


Fig. 19: Number of companies per country that didn't work for public authorities

The following figure shows reasons the companies stated when asked "Which are the reasons why you never offered your energy efficient solutions to public authorities?". It is

important to keep in mind, that these results are based on a very small number of companies.

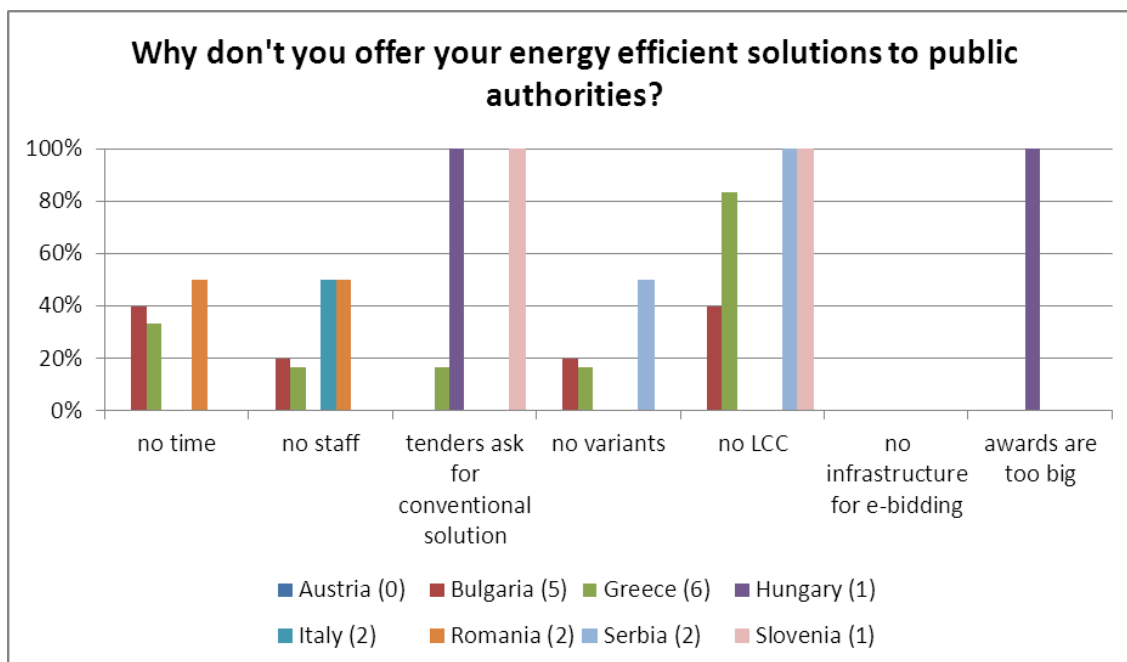


Fig. 20: Why some companies didn't sell their solutions to public authorities

The figure shows that one of the main reasons for not offering the energy efficient solutions to public authorities was the absence of LCC in the tender documents. Another important reason was the lack of time to fill in the tender documents.

4.3.2 Why companies are not successful with their energy efficient solutions

The companies were asked if they were successful in selling their energy efficient solutions to public authorities. Those that were not successful were asked about the reasons for their lack of success: "Could you tell us your opinion why you are not successful with your energy efficient solutions?".

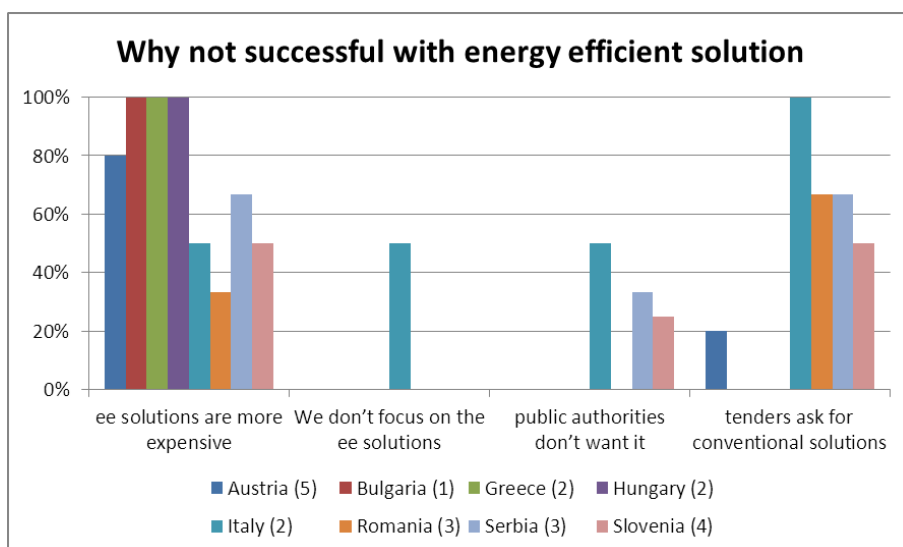


Fig. 21: Why companies were not successful in selling ee solutions to public authorities

The number of companies that said that they were not successful in selling their energy efficient solutions can be seen in the legend of figure 21.

A considerable number of companies in each of the countries said that the main reason why they were less successful in selling their energy efficient (ee) solution was that energy efficient solutions were more expensive than conventional ones. 50 % and more of the companies from Italy, Romania, Slovenia and Serbia said that an important reason for them not being successful in selling their energy efficient solutions were tenders that asked explicitly for conventional solutions.

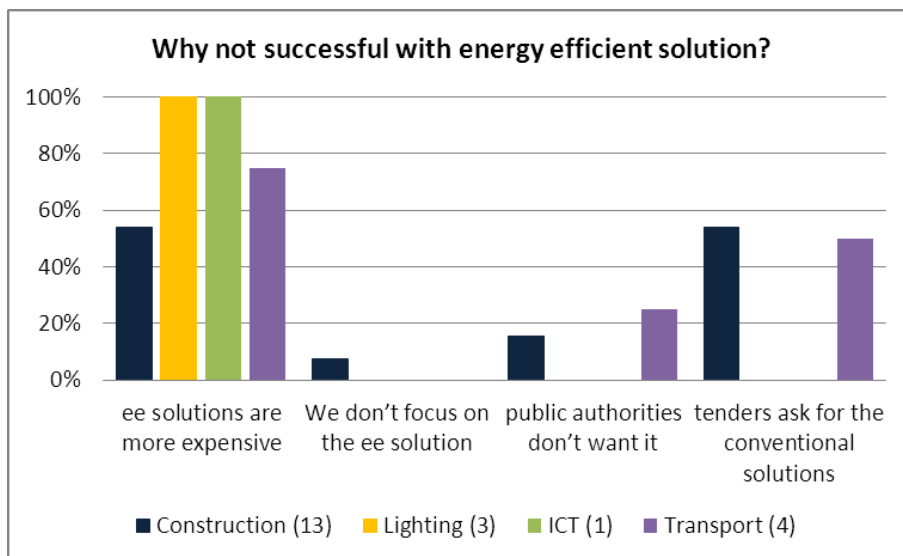


Fig. 22: Why companies in different sectors weren't successful in selling their ee solutions

Figure 22 shows the main reasons why companies in the different sectors were not successful in selling their energy efficient solutions to public authorities. The most important barrier was the higher cost of energy efficient solutions and – in the sectors construction and transport – tender documents that asked explicitly for conventional solutions. We should be careful with the results for lighting and ICT as the number of answers was very small (3 respectively, 1 company answered this question).

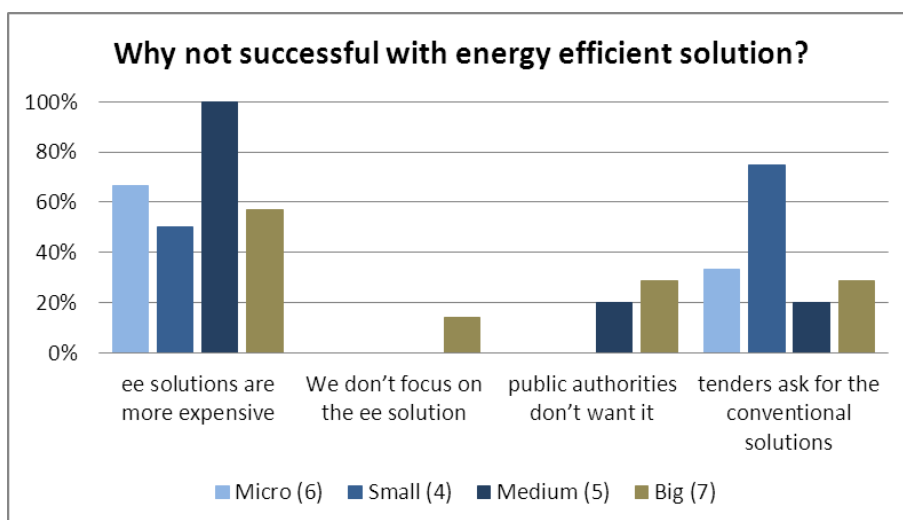


Fig. 23: Why companies of different sizes weren't successful in selling their ee solutions

Figure 23 shows that the perception of barriers does not depend on the size of the company. Companies of every size said that the main barriers were the costs of energy efficient solutions and – to a smaller part – tender documents that asked explicitly for conventional solutions.

The companies were divided in five classes according to the percentage of their sales they made with energy efficient solutions: Companies that sold 80-100 %, 60-80 %, 40-60 %, 20-40 % or 0-20 % energy efficient solutions. Figure 24 shows why companies in the different classes were not successful in selling their energy efficient solutions to public authorities.

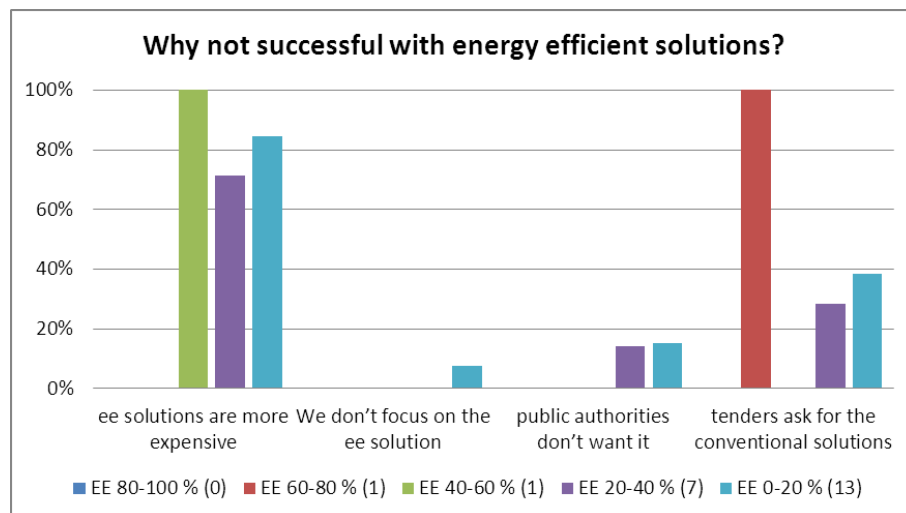


Fig. 24: Why companies with different percentages of their sales being made with ee solutions weren't successful with their energy efficient solutions

Figure 24 shows in its legend that among the companies that made between 80-100 %, 60-80 % and 40-60 % of their sales with energy efficient solutions zero or one company wasn't successful with its energy efficient solutions. The figure also shows that 7 companies which made between 20-40 % as well as 13 companies which made between 0-20% of its sales with energy efficient solutions said that they weren't successful with their energy efficient solutions. That means that the smaller the percentage of energy efficient solutions among the total sales was, the bigger the number of companies that were not successful in selling their energy efficient solutions.

The figure also shows that for those companies that made less than 60 % of their sales with energy efficient solutions, the barrier "the energy efficient solutions are more expensive" was of bigger importance than the barrier that "the tenders ask for conventional solutions".

4.3.3 Why companies are successful with their energy efficient solutions

When asked about the reasons for their success in selling the energy efficient solutions to public authorities ("Could you tell us your opinion why you are successful with your energy efficient solutions?"), most of the companies, but especially those in Austria, Bulgaria, Hungary, Romania, Slovenia and Serbia, saw their activities in convincing public authorities as the key issue. A considerable number of companies in each country also said that the fact that public authorities asked for the energy efficient solution was an important factor for their

success. Networking with public authorities was especially important for companies in Bulgaria and Serbia.

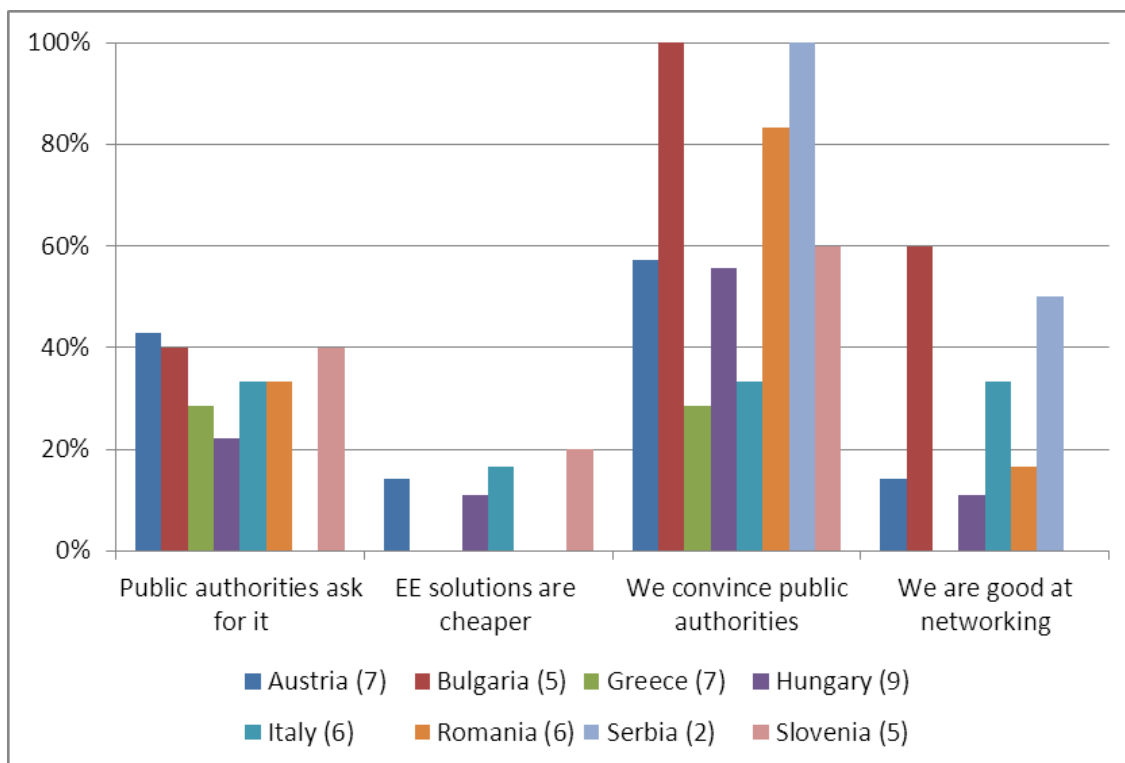


Fig. 25: Why companies were successful in selling their ee solutions to public authorities

Figure 25 shows that in some cases, especially in Austria, Bulgaria, Romania, Slovenia and Serbia, there is a correlation between the success factors “Public authorities ask for energy efficient solutions” and “We convince public authorities”; The higher the percentage of public authorities that asked for energy efficient solutions, the smaller the percentage of companies that had to convince public authorities.

Figure 26 shows the reasons for success according to the sectors the companies came from. In each of the sectors the two main reasons for success were the persuading done by the companies and the request by public authorities.

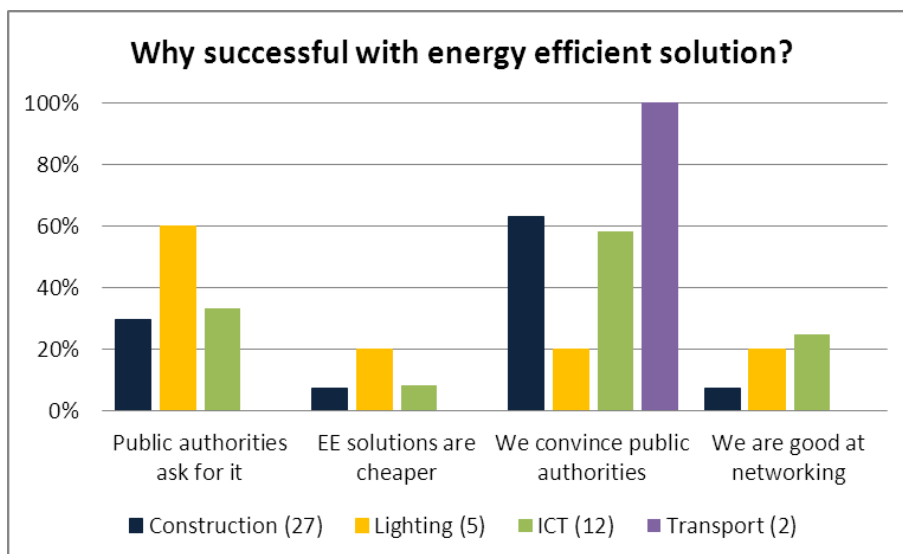


Fig. 26: Why companies in the different sectors were successful in selling their ee solutions

According to the answers of the 5 companies from the lighting sector, the request of public authorities for energy efficient solutions was especially high in the lighting sector. Therefore the need for conviction was lower.

None of the companies from the transport sector said that public authorities asked for energy efficient solutions. According to the Directive 2009/33/EC of 23 April 2009 on the promotion of clean and energy-efficient road transport vehicles energy efficiency and other environmental criteria have to be included in the tender documents. Based on the perception of companies, some public procurers did not seem to know the legislative framework.

Figure 27 shows that the two reasons for success (public authorities asking for energy efficient solutions and companies convincing authorities) were true for companies of every size.

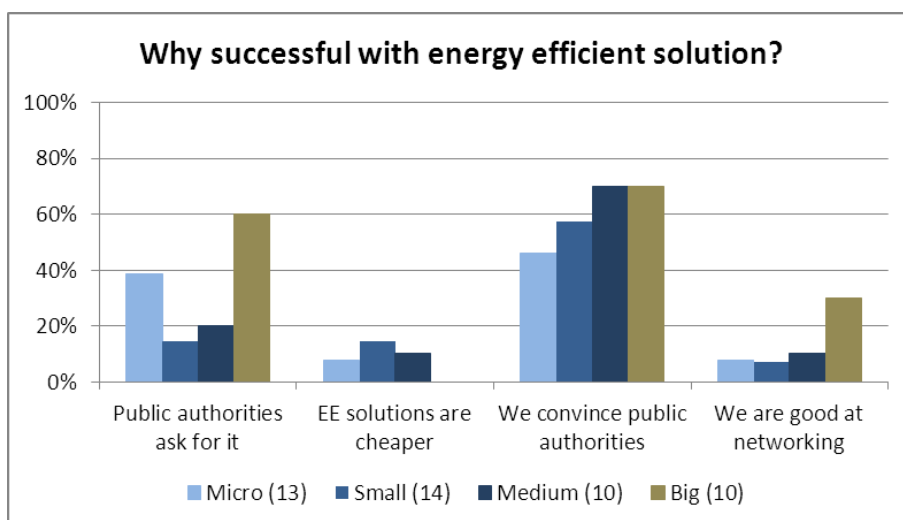


Fig. 27: Why companies of different sizes were successful in selling their ee solutions

The figure shows that conviction/persuasion had not only to be done by micro and small companies but also by medium and big companies. The figure also shows that especially big

and micro companies made the experience that public authorities asked for the energy efficient solutions.

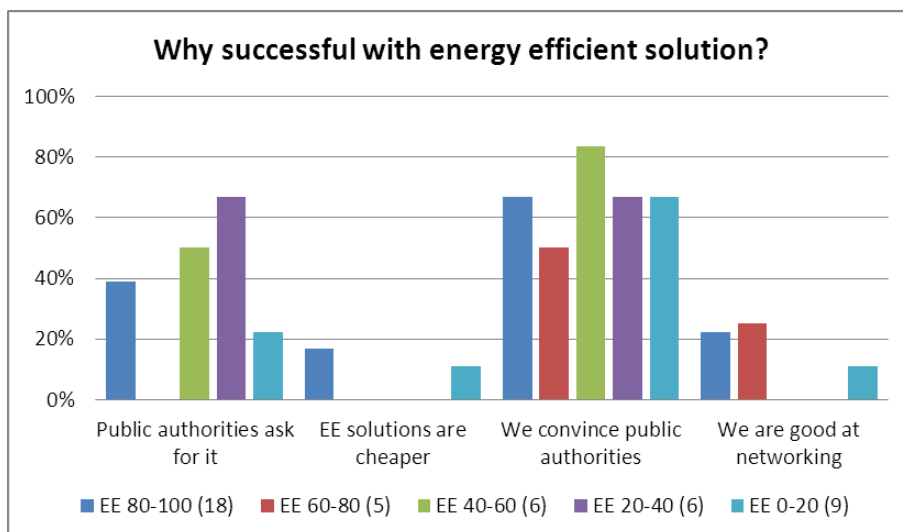


Fig. 28: Why companies with different portions of their sales being made with ee solutions were successful

Figure 28 shows that regardless of the significance energy efficient solutions had in the company, the most important reason for the success of companies in selling their energy efficient solutions to public authorities lay in the ability of the company to convince public authorities about the superiority of their solutions. Another important success factor was the demand by public authorities.

The companies can be classified according to the percentage of their sales they made directly with public authorities. According to figure 29, 60 % of the companies that sold between 70-100 % of their solutions to public authorities said that public authorities would ask for energy efficient solutions. The figure also shows a correlation between the success factor that public authorities ask for energy efficient solutions and the conviction that has to be done by companies (see above).

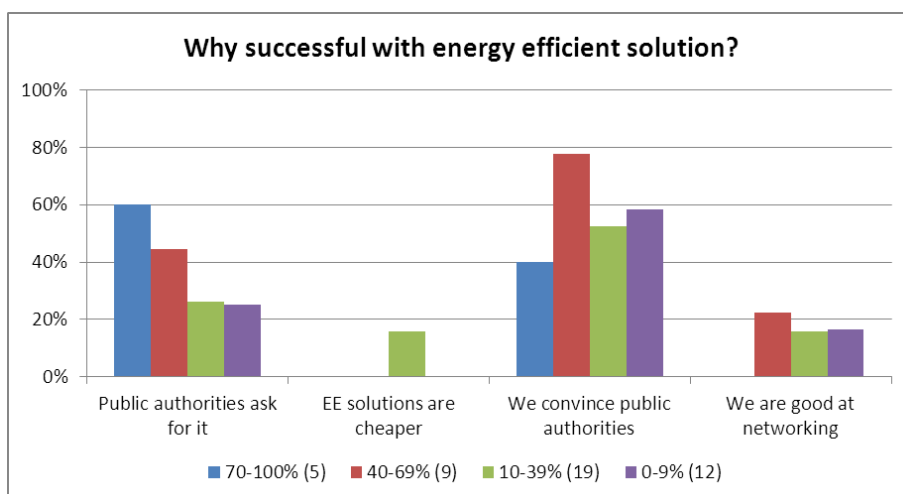


Fig. 29: Why companies that sold different percentages of their sale to public authorities were successful

4.3.4 How to support the sale of energy efficient solutions

In three **open questions**, the companies were asked about the necessary changes that would help them to sell their energy efficient solutions to public authorities (*“From your point of view: What should public authorities make different to make it easier for you to sell your energy efficient solutions (=products, services and works)?”, “What else would you need to realise more of your energy efficient solutions in public authorities?”, “Is there anything else that you would like to add?”*). Results of these questions are shown in the next figures.

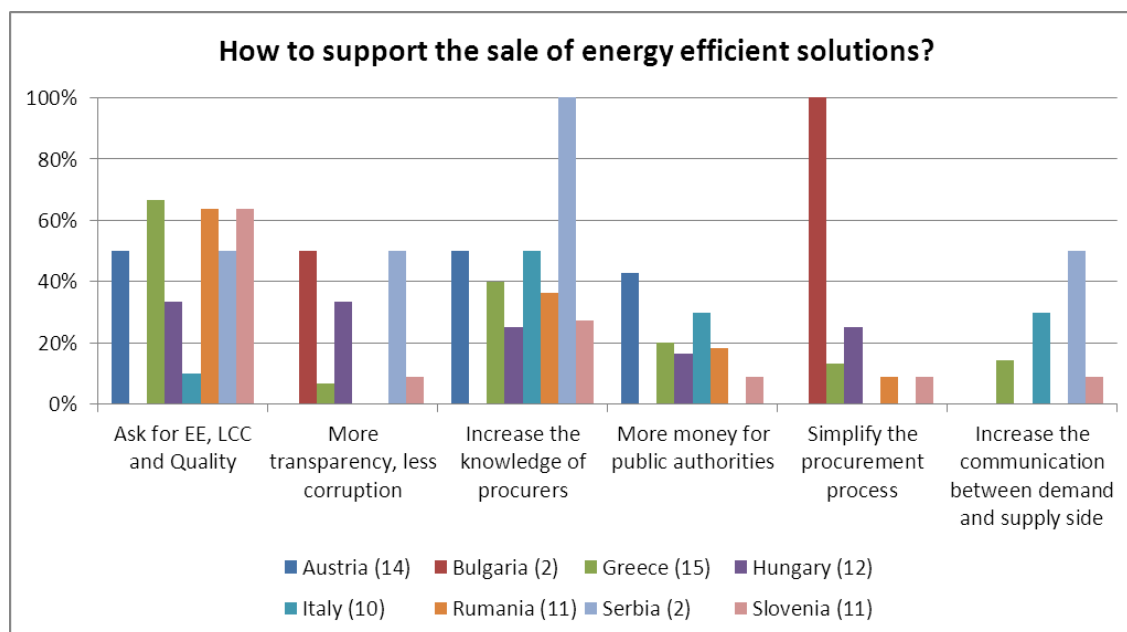


Fig. 30: What could support companies in selling their ee solutions to public authorities

Common themes in the answers independent of the country the company came from as well as the sector they worked in (see fig. 31) and their size (see fig. 32) were “the inclusion of Energy Efficiency, LCC and Quality in the tender documents”, the need for an “increased knowledge for public procurers”, the need for “more money spend by public authorities” and the need for the “simplification of the procurement process”. “More transparency” seemed to be a considerable problem in Bulgaria, Hungary and Serbia. An “increased communication between the demand and the supply side” was mentioned by companies in Greece, Italy, Slovenia and Serbia.

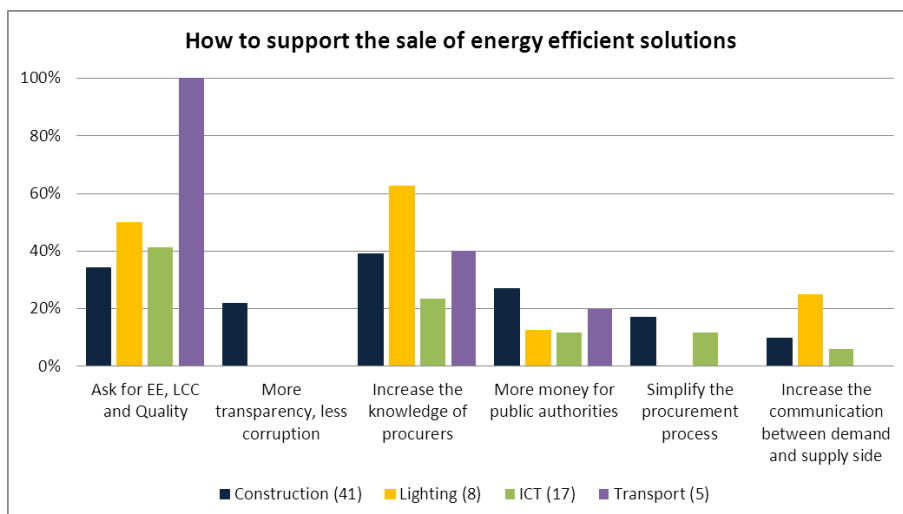


Fig. 31: Sector-specific suggestions how to support companies in selling their ee solutions

To include “Energy Efficiency, LCC and Quality” in the tenders was mentioned by about 40 % of the companies in the construction, lighting and ICT-sector and for all of the companies included from the transportation sector. Transparency and corruption seems to play a role especially in the construction sector. An increased knowledge of public procurers was important for companies in each of the four sectors. About 20 % of the companies in the lighting sector suggested an increased communication between public authorities and companies. This could be chaired by an independent body, like for example – as one company suggested – CRES in Greece.

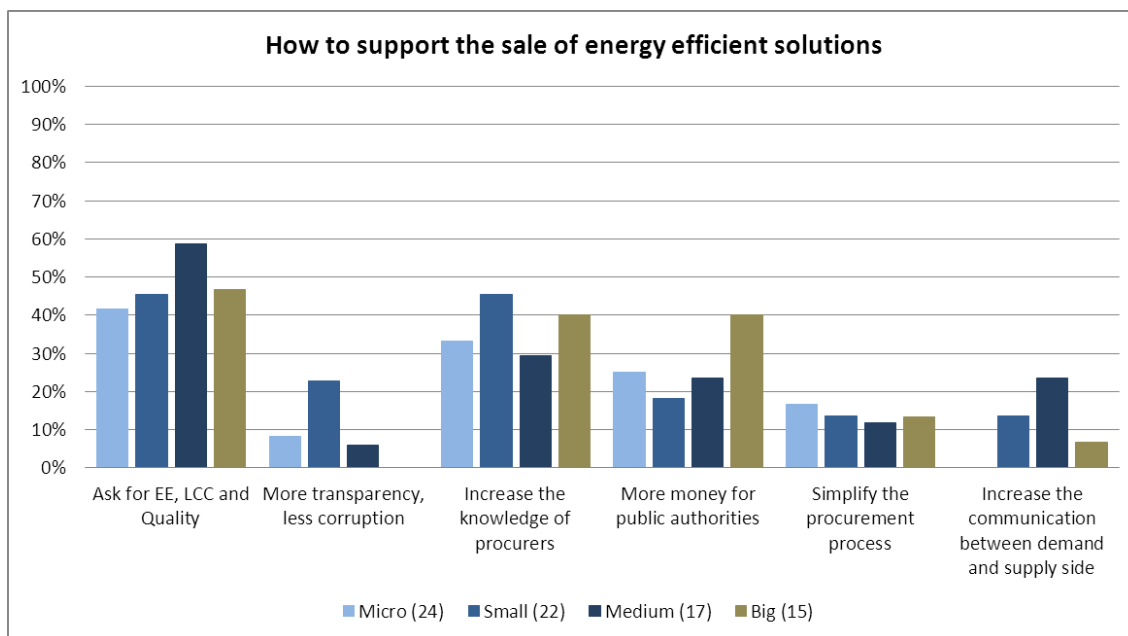


Fig. 32: Size-specific suggestions how to support companies in selling their ee solutions

Figure 32 shows that these suggestions do not differ much between companies of different sizes.

4.3.5 Support offered to companies to sell their energy efficient solutions

The companies were asked “What kind of support is offered to you in your country to increase your level of energy efficiency?”. Their answers can be seen in the figures 33-36.

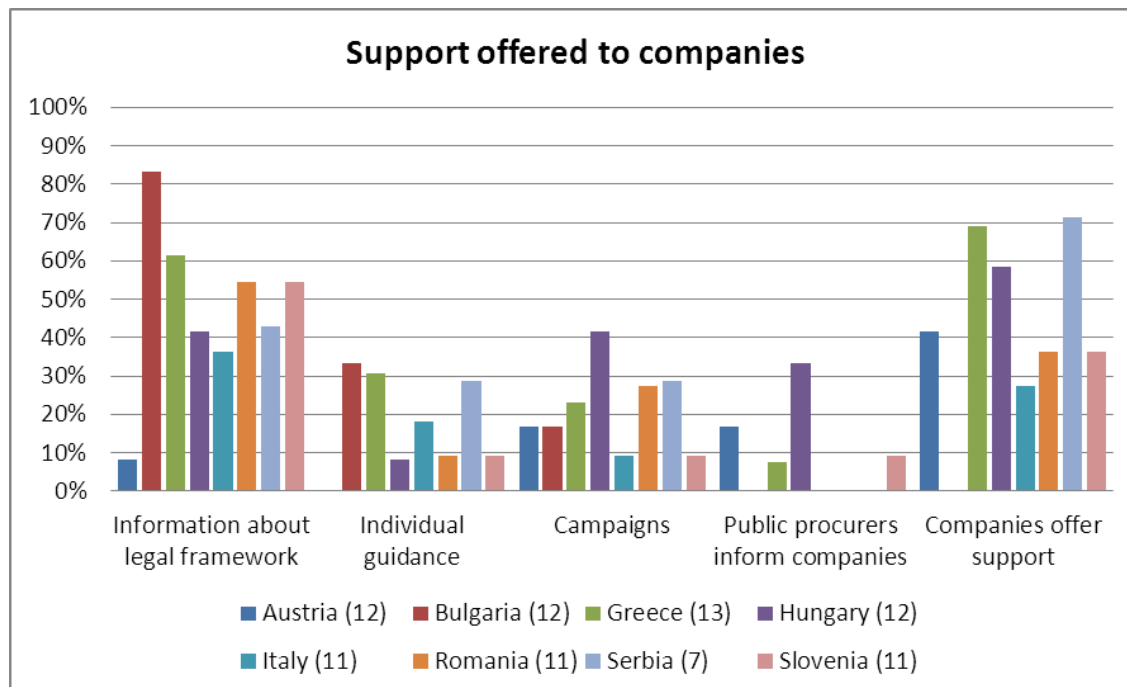


Fig. 33: Support offered in each of the countries to companies to sell their ee solutions

When asked about the support offered to them, the majority of companies said that support is offered to them by organisations (chamber of commerce, ministry of environment, etc.), in the form of information on the legal framework on energy efficiency and environmental issues.

Only a considerable number of companies from Bulgaria, Greece and Serbia had the impression that individual guidance was offered to them. Campaigns to raise awareness for energy efficiency were mentioned by more than 20 % of the companies in Greece, Hungary, Romania and Serbia.

Support in a way that procurers inform companies about their aim to purchase energy efficient was perceived only by a considerable number (30 %) of companies in Hungary. Interestingly, a large number of companies – between 30 % of companies in Italy and 70 % in Serbia – said that it was the other way round: that they would offer information to public procurers. These results seem to be true irrespective of the sector the company worked in (see fig. 34) and the size the company had (see fig. 35).

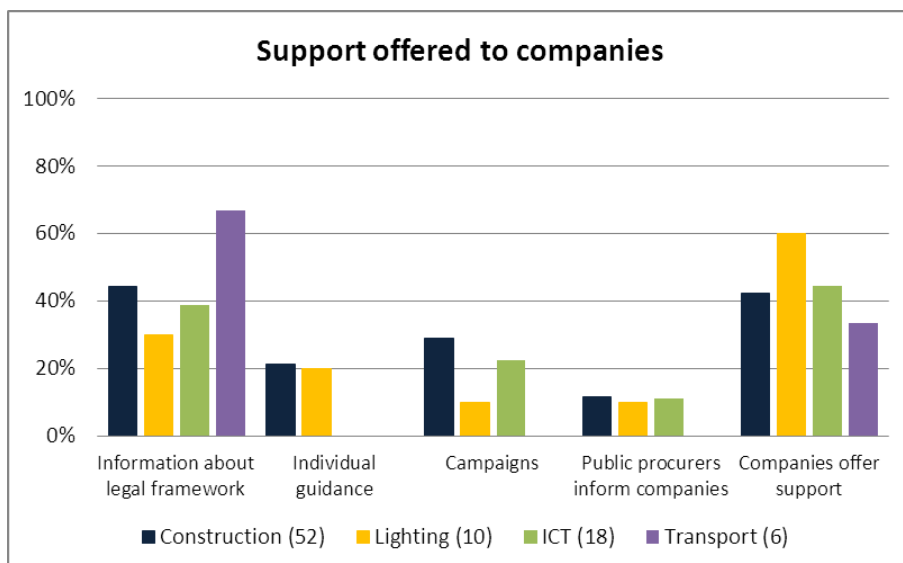


Fig. 34: Support offered in each of the sectors to companies to sell their ee solutions

About 40 % of the companies in the sectors construction, ICT and transport and 60 % of the companies in the lighting sectors said that they offered support to public authorities.

Figure 35 shows that about 30 % of the big and medium companies, more than 50 % of the small companies and 40 % of the micro companies said that they would offer support to public authorities. The figure also suggests that more micro and small companies are informed by the procurers about their aim to procure energy efficient solutions.

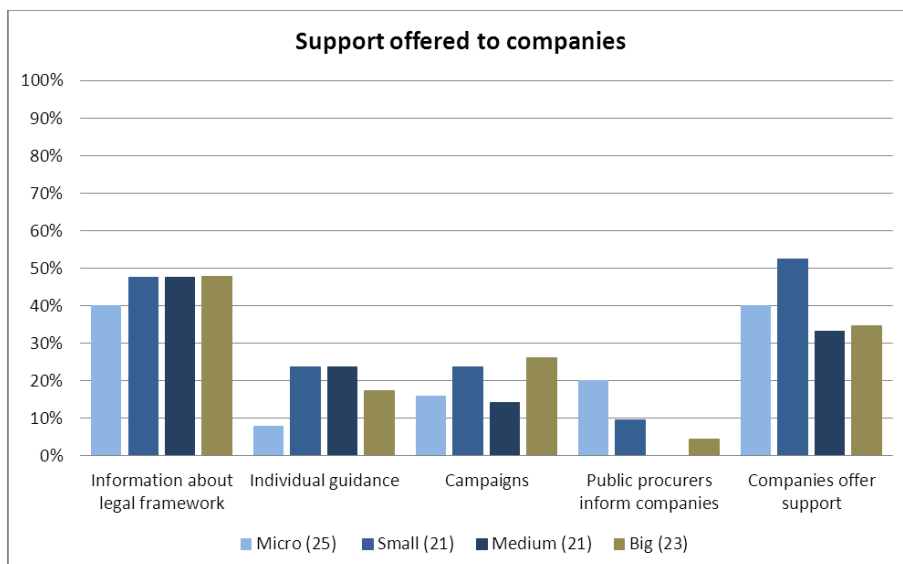


Fig. 35: Support offered to companies of different sizes to sell their ee solutions

Figure 36 shows two of the above mentioned support-mechanisms and their importance according to the ways the companies sold their solutions to public authorities. The figure shows that the low percentage of public procurers who inform companies about their aim to procure energy efficient solutions is the same for public authorities that tendered, offered direct awards or gave contracts to companies that included subcontractors.

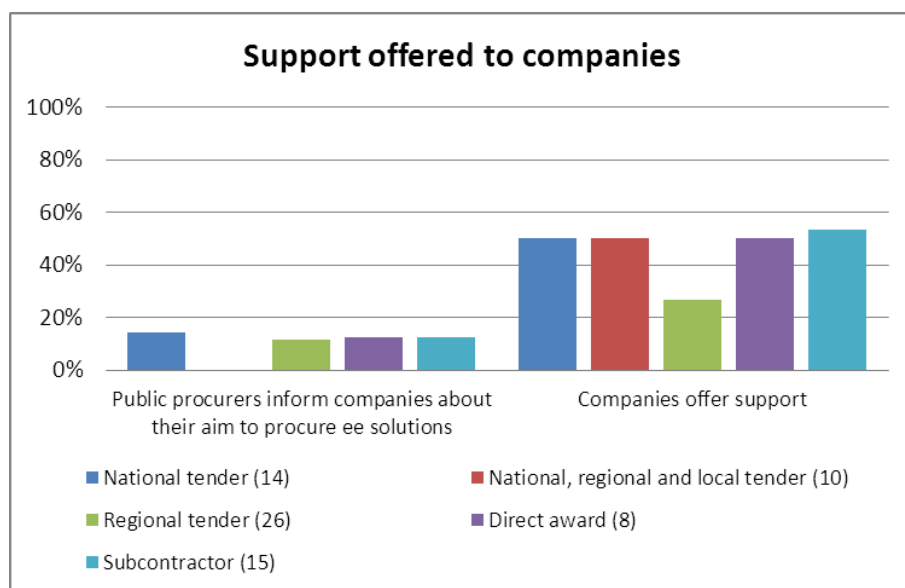


Fig. 36: Support offered to companies to sell their ee solutions

The figure also shows that the perception of companies, that it was the other way round and that they offered support to public authorities is the same irrespectively of the way the companies took part in public purchases. With the exception of companies that worked mostly in regional tenders. A smaller percentage (20 %) of them said that they would offer support to the public authorities.

4.4 Role of centralized procurement and e-bidding

4.4.1 Could centralized procurement support energy efficient solutions?

The companies were asked whether the centralisation of public procurement (centralised agencies or joint procurement) can support the sale of energy efficient solutions (*"From your point of view, does the centralisation of public procurement (centralised agencies or joint procurement) support the selling of energy efficient solutions?"*). The answers differed a lot – this is true for each of the countries (fig. 37), sectors (fig. 38) and size of the company (fig. 39).

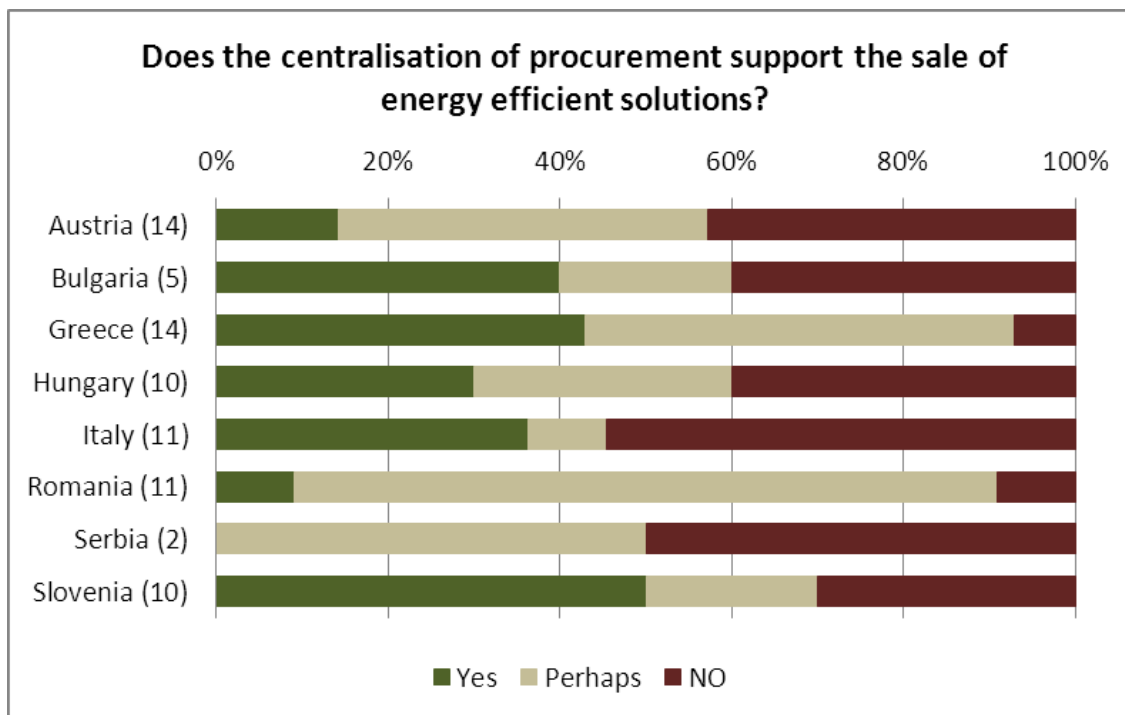


Fig. 37: Role of centralized procurement

Between 40 % and more than 50 % of the companies in Austria, Bulgaria, Hungary, Italy and Serbia rejected the idea that centralized procurement could support the sale of energy efficient solutions. Some of their reasons were:

- Centralized systems can't address the individual needs of local public authorities.
- Each public authority should decide if they are willing to pay more for the energy-efficient solution – and less for operational costs – or not.
- Centralisation is only good for big companies. They would get the contracts and smaller companies would do the job as subcontractor.
- The choice of solutions is based on the sensitivity of the buyer – a centralized buyer is not more sensible for energy efficiency.
- A centralized system could cause delays.
- Some solutions have a high added value only for local specific geographical well defined contexts, like for example geothermal or wind power solutions empowered by local and territorial environmental features.

- The centralized system increases corruption.
- A joint development of ideas between the demand and the supply side would become more difficult.

In Greece and Slovenia more than 40 % of the companies supported the idea that a centralized system could support them. Some of the reasons were:

- Centralization will lead to higher standardization and simplification.
- Centralization could support the awarding of the contract to the economically most advantageous offer instead of the offer with the lowest price.
- Centralization provides transparency and comparability of the tenders submitted.
- Centralization offers the possibility of having specific and skilled people as counterpart.

In Romania most of the companies offered the answer “perhaps”. Here are some of the reasons the companies from all of the eight countries offered for their vote “perhaps”:

- The centralized system offers more transparency, but on the other hand it is hard to work both with final recipients and the agency responsible for the tender. That might bring confusion.
- The centralized system could collect know-how and act as an information agent but it is less clear whether this system is effective.
- All depends on the centralized system and what kind of solutions it asks for. Many aspects are of relevance, smaller procurers are motivated to buy energy efficient solutions, too.

Figure 38 shows what the companies in the different sectors thought about centralized procurement. The biggest support came from companies in the ICT and the transportation sector, the biggest rejection from companies in the construction and the lighting sector which probably work mostly for local and regional public authorities.

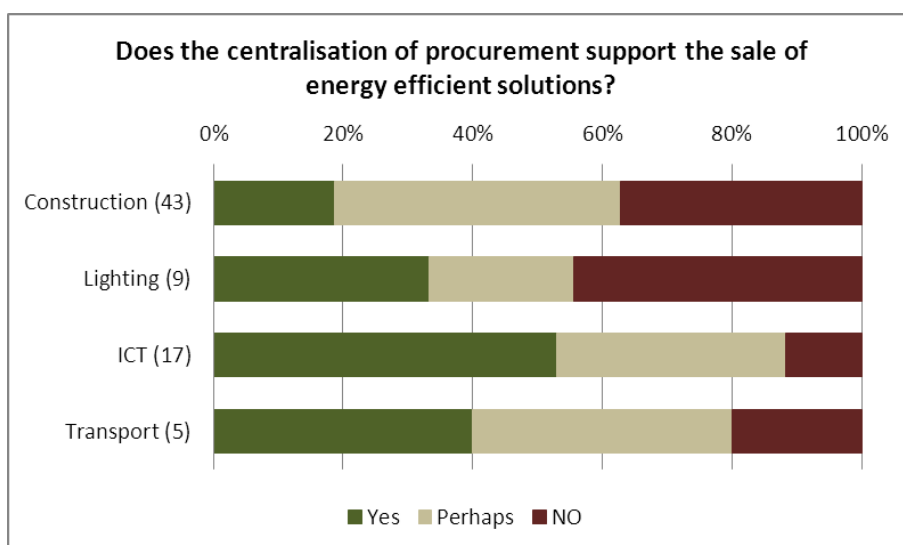


Fig. 38: Sector-specific answers: Role of centralized procurement

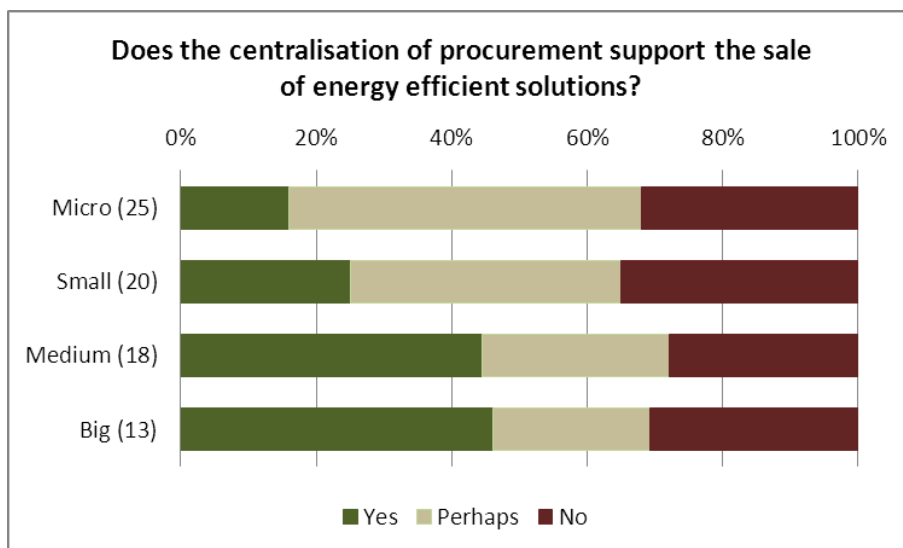


Fig. 39: Size-specific answers: Role of centralized procurement

Figure 39 shows the answers of the companies according to their size. It isn't astonishing that the highest support (more than 40 %) is to be found among the medium and big companies. It is more astonishing that the percentage of companies that rejects the idea is about 30 % – irrespective of the size of the company.

Figure 40 shows the opinion of companies according to the way they sell their solutions to public authorities. There doesn't seem to be a correlation between the sale of solutions to national authorities and the support of centralised procurement. The figure shows that none of the companies that got direct awards from public authorities supported the idea of a centralised procurement without restriction. That is easily explicable because with a centralised system, the amount of direct awards usually decreases.

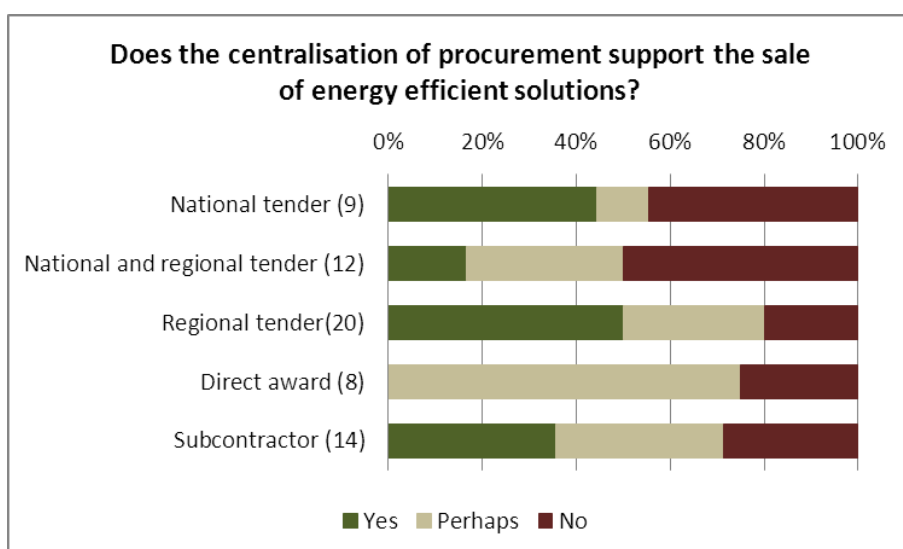


Fig. 40: Role of centralized procurement according to the ways the companies sold their solutions

In figure 41 the opinion of the companies about centralized procurement is shown according to the percentage of their sale, they made directly with public authorities. It can be seen that among those companies that sold between 70-100 % of their sale directly to public

authorities, the rejection of a centralized system was highest while the biggest support for the centralized system can be found among those companies that made only between 0-9% of their sale directly with public authorities.

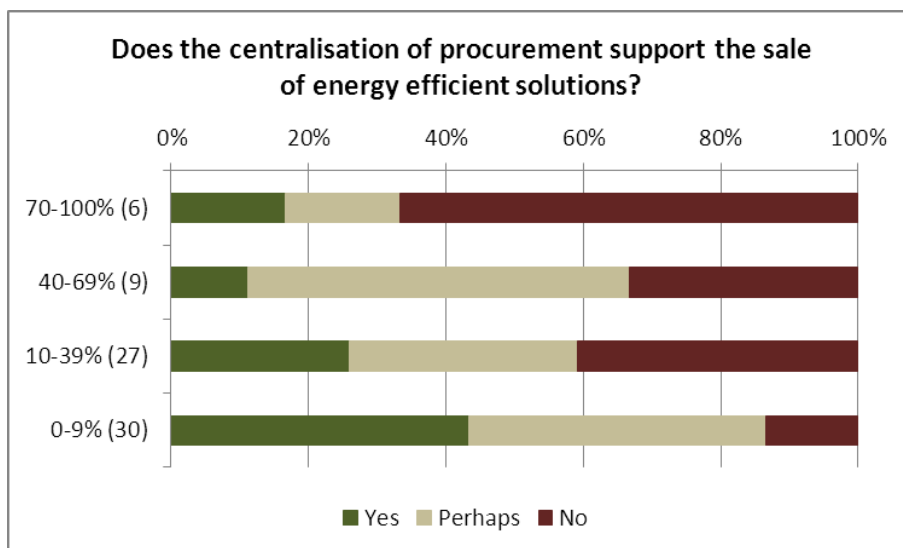


Fig. 41: Role of centralized procurement according to percentage of the sale the company made directly with public authorities

4.4.2 Does e-bidding support the sale of energy efficient solutions?

The companies were asked whether e-bidding can support the sale of energy efficient solutions: “From your point of view, does the e-bidding-process in public procurement support the selling of energy efficient solutions (=products, services, works)?”. The answers between the countries differed a lot.

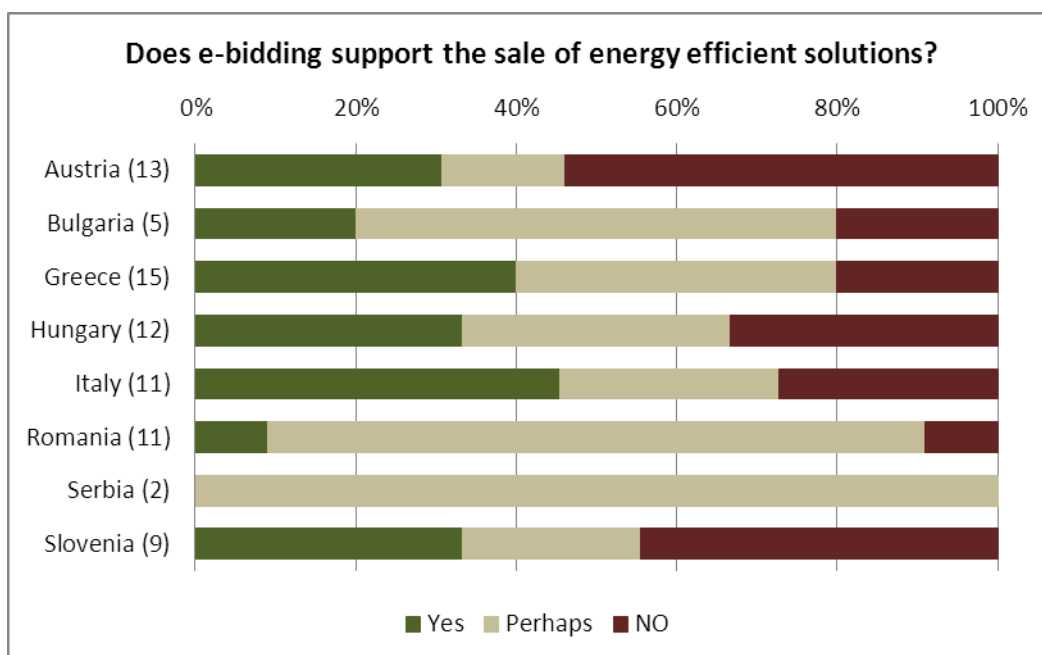


Fig. 42: Could e-bidding support the sale of energy efficient solutions

The companies offered several reasons, for example:

- No connection can be seen between e-bidding and the support of energy efficient solutions.

Against e-bidding:

- The personal contact is important. An e-bidding system would be a barrier.

In support of e-bidding:

- E-bidding would provide transparency and comparability of tenders submitted.
- E-bidding could make the public procurement process simpler and save paper.
- E-bidding offers an advantage to small companies familiar with innovative solutions.
- E-bidding will solve a lot of problems, speed the process up and make it more transparent.

Ambivalent opinions:

- If the philosophy remains bureaucratic, e-bidding can only help with the huge number of documents but not with the quality of products and services.
- E-bidding can be helpful when products are purchased. If services and works are purchased it does not seem to simplify the procedure.

4.4.3 Are companies prepared to offer a warranty?

Companies were asked whether they would be prepared to offer a warranty for maintenance when offering energy efficient/green products, services or works. The following figure shows that about 90 % of those companies that sold mainly energy efficient solutions and 60 % of companies that sold mainly conventional solutions offered a warranty on their energy efficient solutions.

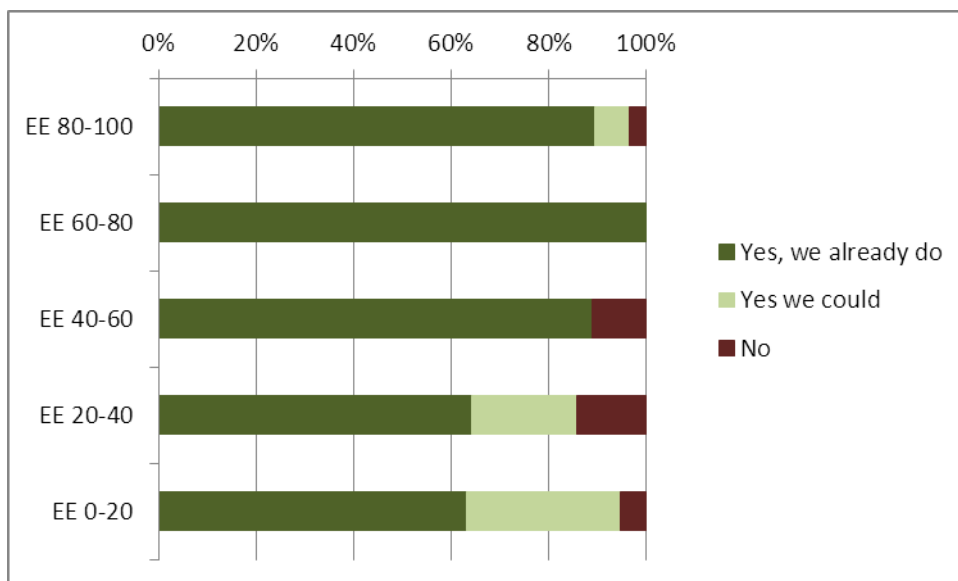


Fig. 43: Were the companies prepared to offer a warranty for their ee solutions

5 Summary of the main results

Importance of Energy Efficiency in public purchases differs a lot

One of the main results is that from the perspective of the companies, the importance of Energy Efficiency in public purchases differs a lot between the eight SEE-countries included in the survey. In two countries, Bulgaria and Austria, the importance of Energy Efficiency seems to be highest, in three countries, Greece, Hungary and Slovenia, the importance seems to be mixed between unimportant and of major importance. In the three countries Italy, Romania and Serbia the importance seems to be lowest – none of the companies in these countries said that energy efficiency would have a major importance.

Some barriers are unrelated to the energy efficiency of the solution that is to be sold

Some barriers are specific for working with public authorities regardless of the solution itself and its energy efficiency. According to about 50 % of the companies included in the survey, the main barrier for the participation in public tenders was *the difficulty to invest the time to fill in the tender*. Accordingly, about 50 % of the companies suggest that the process could be simplified by reducing the amount of required documents.

The lack of the use of LCC prevents some companies from offering their solutions to public authorities

A smaller number of companies included in the survey didn't offer its solutions to public authorities. One of the main reasons for the companies was that public authorities did not include LCC in their tender documents.

Main barriers for companies preventing them from being successful with energy efficient solutions: Price and tenders that ask for conventional solutions

The companies could characterize themselves as being not successful or as being successful in selling their energy efficient solutions to public authorities. Those who characterized themselves as being not successful offered two main reasons:

- a) energy efficient solutions were more expensive than conventional solutions
- b) majority of tenders asked especially for conventional solutions

Main success factors for companies in selling their energy efficient solutions: Their ability to convince and the demand side asking for energy efficiency

Those companies that characterized themselves as being successful in selling their energy efficient solutions to public authorities said that the two main reasons for success were:

- a) their ability to convince public authorities about the superiority of the energy efficient solution
- b) the fact that more and more public procurers ask for energy efficient solutions

The higher the percentage of the sales made with energy efficient solutions, the more successful the companies were in selling energy efficiency

The smaller the percentage of energy efficient solutions among the total sales was, the bigger the number of companies that weren't successful in selling their energy efficient solutions and vice versa.

Support for the sale of energy efficient solutions: Ask for it in the tender, increase the knowledge of procurers, increase the communication between the demand and the supply side

The companies offered a wide range of possibilities how to increase the sale of energy efficient solutions:

- Procurers have to include Energy Efficiency, LCC and Quality in their tenders.
- The knowledge of public authorities/public procurers has to be increased. Only informed authorities can make the right choices.
- The procurement process has to be simplified.
- Public authorities need more money to invest in energy efficient solutions.
- The communication between the demand and the supply side has to be increased.
- The process has to become more transparent.

Being asked about the support they get for selling energy efficiency, many companies said that it would be the other way round, i.e. that they offered support

A considerable number of companies said that they would get support from public and other organisations by being informed about the legal framework of energy efficiency. A considerable number of companies also said that it was the other way round, that information was not offered to them, but that it was them offering information to public authorities about energy efficient solutions.

The opinion about the role centralized procurement can play in supporting energy efficient solutions differed widely

A considerable number of companies rejected the idea that centralized procurement could help them sell their energy efficient solutions. An also considerable number of companies said that centralized procurement could offer support. Many companies were ambivalent.

The opinion about the role e-bidding can play in supporting energy efficient solutions differed, too

Some companies said that there was no connection between e-bidding and the sale of energy efficient solutions. Some companies thought that the e-bidding process would support small and innovative companies while others said that the direct contact between companies and public authorities would be crucial.

The barriers and suggestions are often common, irrespectively of the sector the companies came from

The barriers and suggestions mentioned above are true for the majority or at least a considerable number of companies included in the survey. **They are also common, irrespectively of the sector the companies come from.** Nevertheless, there are differences between the sectors. In the following two tables the following 10 most important barriers for companies to sell their energy efficient solutions to public authorities are shown:

- (1) Energy efficient solutions are more expensive
- (2) Difficulties to invest the time for tender documents
- (3) Tenders don't ask for Energy Efficiency, LCC or Quality
- (4) Tenders ask for conventional solutions
- (5) Public authorities lack knowledge
- (6) Public authorities don't spend enough money
- (7) Not enough communication between the demand and the supply side
- (8) Too small to take part in tenders
- (9) Not enough staff
- (10) Lack of transparency

The first table (the sector/barrier matrix) shows the percentage of companies from the four sectors that perceived the barrier as being relevant. In the table a percentage between 0-24 % is marked with a light blue, a percentage between 25-49 % is marked in a medium blue, a percentage between 50-74 % is marked with a darker blue and a percentage between 75-100 % is marked with a dark blue. It is important to keep in mind that these percentages are sometimes based on the opinions of a very small number of companies.

The second table (the size/barrier matrix) shows the percentage of companies of different sizes that perceived the barrier as being relevant.

Tab. 1: Barriers/sectors-matrix

	Barriers	Construction	Lighting	ICT	Transport
1	Energy efficient solutions are more expensive	54%	100%	100%	75%
2	Difficulties to invest the time for tender documents	40%	60%	54%	80%
3	Tenders don't ask for LCC, EE or quality	34%	50%	41%	100%
4	Tenders ask for conventional solutions	54%	0%	0%	50%
5	Public authorities lack knowledge	39%	63%	24%	40%
6	Public authorities don't spend enough money	27%	13%	12%	20%
7	Not enough communication between demand and supply side	10%	25%	6%	0%
8	Too small to take part in public tenders	18%	25%	15%	0%
9	Not enough staff	10%	0%	31%	20%
10	Lack of transparency	22%	0%	0%	0%

Tab. 2: Barriers/company-size-matrix

	Barriers	Micro	Small	Medium	Big
1	Energy efficient solutions are more expensive	67%	50%	100%	57%
2	Difficulties to invest the time for tender documents	42%	47%	44%	75%
3	Tenders don't ask for LCC, EE or quality	42%	45%	59%	47%
4	Tenders ask for conventional solutions	33%	75%	20%	29%
5	Public authorities lack knowledge	33%	45%	29%	40%
6	Public authorities don't spend enough money	25%	18%	24%	40%
7	Not enough communication between demand and supply side	0%	14%	24%	7%
8	Too small to take part in public tenders	38%	11%	6%	0%
9	Not enough staff	13%	11%	25%	17%
10	Lack of transparency	8%	23%	6%	0%

Appendix: Questionnaire

1. Questions about the company

1.1 What is your position in the company?

1.2 Which are your tasks/responsibilities?

1.3 Please, match your company to the following groups: *(tick one or more boxes)*

- ☐ Company in the Construction/Buildings-sector
- ☐ Company in the Construction/Infrastructure sector
- ☐ Company in the Transportation sector
- ☐ Company in the Office machinery sector (including "Information and Communication Technologies" (ICT))
- ☐ Company in the Lighting sector
- ☐ Company in the Health sector

1.4 Please, match the main offers of your company to the following groups: *(tick one or more boxes)*

- ☐ Products *(cars, trains, PCs, printers, CT scanners, etc.)*
- ☐ Services *(planning, consultancy, etc.)*
- ☐ Construction works *(bricklayers, carpenters, etc.)*

1.5 Please, describe one energy efficient/green offer of your company and its differences to its conventional counterpart:

1.6 What part of your sales is made approx. with energy efficient/green solutions? *(tick one box)*

- ☐ 0-20 %
- ☐ 20-40 %
- ☐ 40-60 %
- ☐ 60-80 %
- ☐ 80-100 %

1.7 How did your energy efficient/green offers (products, services and works) change in the last 5 years? *(tick one or more boxes)*

☐ Our offers didn't change much.

☐ The products we offer became more energy efficient.

☐ Our offers changed continuously.

☐ Other: _____

1.8 How much of your advertising budget is dedicated to your energy efficient/green solutions? *(tick one box)*

☐ 0-20 %

☐ 20-40 %

☐ 40-60 %

☐ 60-80 %

☐ 80-100 %

1.9 Has your company/site implemented the following management systems? *(tick one or more boxes)*

☐ Yes, an environmental management system (EMAS or ISO 140001)

☐ Yes, an energy management system (ISO 50001)

☐ Yes, a CSR-system

☐ No

☐ Yes, the following management system: _____

1.10 Could you tell us the revenue (=income of the company) of your company?

_____ EURO

1.11 Could you tell us the number of employees of your company?

2. Questions about knowledge & customers

2.1 Do you know if one of the following strategies exists in your country/region? (tick one or more boxes)

- ☐ There is a *national* energy efficiency strategy.
- ☐ There is a *regional/local* energy efficiency strategy.
- ☐ There is a *national* strategy on Green Public Procurement.
- ☐ There is a *regional/local* strategy on Green Public Procurement.
- ☐ I don't know if there are any strategies on Energy Efficiency or Green Public Procurement.

2.2 If at least one national/regional strategy is known: What is your opinion about the level of aspiration of the aims of the strategy _____ (please pick one of the strategies that are known)? (tick one box)

- ☐ The aims of the strategy are too demanding.
- ☐ The aims of the strategy are not demanding enough.
- ☐ The aims of the strategy are well balanced.
- ☐ I know that the strategy exist but I don't know its aims in detail.
- ☐ Other: _____

2.3 From your point of view, how important is the topic "energy efficiency" in public purchases in the last 3 years? (tick one box)

- ☐ The topic "energy efficiency" isn't important in public purchases.
- ☐ The topic "energy efficiency" increased in the last 3 years, but the importance is still not very high.
- ☐ The topic "energy efficiency" increased in the last 3 years and is now of major importance.
- ☐ Other: _____

2.4 What kind of support is offered to you in your country to increase your level of energy efficiency? (tick one or more boxes)

- ☐ There are organisations (chamber of commerce, ministry of environment, etc.) that offer **information** on the legal framework on **energy efficiency and environmental issues**.
- ☐ There are organisations (chamber of commerce, ministry of environment, etc.) that offer **individual guidance** on **energy efficiency or environmental issues**.
- ☐ There are publicly financed campaigns that pursue the goal to raise awareness among companies for energy efficient solutions.
- ☐ Public procurers inform companies about their aim to increase the energy efficiency of products, services and works they purchase.
- ☐ It is the other way round: We offer support/information to public authorities because our products/services are highly innovative.
- ☐ Other: _____

2.5 Could you estimate, what percentage of your sales you made in the last 3 years with the following kind of customers (include the approx. percentage):

_____ % Public authorities/public facilities

_____ % Private companies

_____ % Private consumers

2.6 Which way of taking part in public contracts is most common to you: (tick one box)

☐ We take part in tenders **from local/regional public authorities** (please continue with questions I, page 5)

☐ We take part in tenders **from national public authorities** (please continue with questions I, page 5)

☐ We get direct awards **from our local/regional public authorities** (please continue with questions II, page 8)

☐ We get direct awards **from national public authorities** (please continue with questions II, page 8)

☐ We work as **subcontractor** in public contracts (please continue with questions III, page 10)

☐ We don't take part in public contracts, neither directly nor indirectly (as subcontractor) (please continue with questions IV, page 12)

You have to continue EITHER with I, II, III OR IV.

I: For companies that take mainly part in public tenders

3. Questions concerning two specific tenders - *one where you OFFERED an energy efficient solution and one where you offered a conventional solution*

3.1 How do you usually get information about public tenders? *(tick one or more boxes)*

- ☐ Tenders Electronic Daily (TED).
- ☐ The official national publication.
- ☐ From regional or local publications.
- ☐ The internet portal _____.
- ☐ We have strong relations with our public authorities and often get involved before the tender documents are published.
- ☐ Other: _____

Please, describe the latest public tender where you OFFERED one of your energy efficient solutions:

3.2 When did you take part in this tender (MM/JJ)? _____

3.3 What did you offer?

3.4 Did the tender ask specifically for an energy efficient solution? *(tick one box)*

- ☐ Yes *(continue with question 3.6)*
- ☐ No *(continue with question 3.5)*

3.5 **If the tender documents didn't ask for an energy efficient solution:** Why did you decide to offer the energy efficient solution and not the conventional one?

3.6 Did the tender offer the technical specifications in form of configurational or functional requirements? *(tick one box)*

- ☐ Configurational requirements
- ☐ Functional requirements
- ☐ Both

3.7 Was the contract awarded to the lowest price or the most economically advantageous tender? *(tick one box)*

- ☐ Lowest price
- ☐ Most economically advantageous tender

3.8 Were the Life Cycle Costs (including for example maintenance, operating costs, etc.) taken into account in the award of the contract? *(tick one box)*

- ☐ Yes
- ☐ No

3.9 Did you win the tender? *(tick one box)*

☐ Yes *(continue with question 3.10)*

☐ No *(continue with question 3.11)*

3.10 If you won the tender: From your point of view, what were the reasons you won?

3.11 If you didn't win the tender: From your point of view, what were the reasons you didn't win?

Please, describe the latest public tender where you OFFERED a conventional solution:

3.12 When did you take part in this tender (MM/JJ): _____

3.13 What did you offer?

3.14 Did the tender ask specifically for a conventional solution? *(tick one box)*

☐ Yes *(continue with question 3.16)*

☐ No *(continue with question 3.15)*

3.15 If the tender didn't ask for the conventional solution: Why did you decide to offer the conventional solution and not the energy efficient one?

3.16 Did the tender offer the technical specifications in form of configurational or functional requirements? *(tick one box)*

☐ Configurational requirements

☐ Functional requirements

☐ Both

3.17 Was the contract awarded to the lowest price or the most economically advantageous tender? *(tick one box)*

☐ Lowest price

☐ Most economically advantageous tender

3.18 Were the Life Cycle Costs (including for example maintenance, operating costs, etc.) taken into account in the award of the contract? *(tick one box)*

☐ Yes

☐ No

3.19 Did you win the tender? *(tick one box)*

☐ Yes *(continue with question 3.20)*

☐ No *(continue with question 3.21)*

3.20 If you won the tender: From your point of view, what were the reasons you won?

3.21 If you didn't win the tender: From your point of view, what were the reasons you didn't win?

3.22 If you take a look at the last 3 years – which solutions did you usually SELL to public authorities? *(tick one box)*

☐ The conventional solutions *(continue with question 3.23).*

☐ The energy efficient solutions *(continue with question 3.24).*

3.23 If the answer is “the conventional solutions”: Could you tell us your opinion why you are not successful with your energy efficient solutions? *(tick one or more boxes)*

☐ We don't focus on the energy efficient solution.

☐ Because the public authorities don't want it.

☐ Because the tender documents ask specifically for the conventional solution.

☐ Because the energy efficient solutions are more expensive than the conventional solutions.

☐ Any other reasons: _____

3.24 If the answer is “the energy efficient solutions”: Could you tell us your opinion why you are successful with your energy efficient solutions? *(tick one or more boxes)*

☐ Because the public authorities ask for it.

☐ Because the energy efficient solutions are cheaper as the conventional solutions.

☐ Because we do our best to convince our customers that our energy efficient solutions are the better solutions.

☐ Because we are good at networking with our public authorities.

☐ Any other reasons: _____

II: For companies that get direct awards from public authorities

3. Questions concerning two specific direct awards - *one where you SOLD an energy efficient solution and one where you sold a conventional solution*

3.1 How do you usually get direct awards from public authorities? *(tick one or more boxes)*

- ☐ It is usually based on an offer that we delivered.
- ☐ The public employees usually order directly without asking for an offer.
- ☐ Other: _____

Please, describe the latest direct award from a public authority where you sold one of your energy efficient solutions:

3.2 When did you sell the solution (MM/JJ)? _____

3.3 What did you sell?

3.4 Did the procurement officer ask directly for the energy efficient solutions? *(tick one box)*

- ☐ Yes *(continue with question 3. 6)*
- ☐ No *(continue with question 3.5)*

3.5 **If the procurement officer didn't ask for an energy efficient solution:** Why did you decide to offer the energy efficient solution and not the conventional one?

Please, describe the latest direct award from a public authority where you sold a conventional solution

3.6 When did you sell the solution (MM/JJ)? _____

3.7 What did you sell?

3.8 Did the procurement officer ask directly for the conventional solution? *(tick one box)*

- ☐ Yes *(continue with question 3.10)*
- ☐ No *(continue with question 3.9)*

3.9 **If the procurement officer didn't ask for the conventional solution:** Why did you decide to offer the conventional solution and not the energy efficient one?

3.10 If you take a look at the last 3 years – which solutions did you usually sell to public authorities? (tick one box)

- ☐ The conventional solutions (continue with question 3.11).
☐ The energy efficient solutions (continue with question 3.12).

3.11 If the answer is “the conventional solutions”: Could you tell us your opinion why you are not successful with your energy efficient solutions? (tick one or more boxes)

- ☐ Because we don't focus on our energy efficient solutions.
☐ Because the public authorities want to stick to “business as usual”.
☐ Because the energy efficient solutions are more expensive than the conventional solutions.
☐ Any other reasons: _____
- _____
- _____

3.12 If the answer is “the energy efficient solutions”: Could you tell us your opinion why you are successful with your energy efficient solutions? (tick one or more boxes)

- ☐ Because the public authorities ask for it.
☐ Because the energy efficient solutions are cheaper as the conventional solutions.
☐ Because we are good at networking with our public authorities.
☐ Because we do our best to convince our customers that our energy efficient solutions are the best solutions.
☐ Any other reasons: _____
- _____
- _____

III: For companies that work as subcontractor in public contracts

3. Questions concerning two specific subcontracts - *one where you sold an energy efficient solution and one where you sold a conventional solution*

3.1 How do you usually get subcontracts from companies? *(tick one or more boxes)*

- ☐ It is based on an offer that we delivered.
- ☐ The company order directly without asking for an offer.
- ☐ We usually work together with certain companies in public contracts.
- ☐ Other: _____

Please, describe your last subcontract in a public contract where you sold one of your energy efficient solutions:

3.2 When did you sell the solution (MM/JJ)? _____

3.3 What did you sell?

3.4 Did the company ask specifically for an energy efficient solution? *(tick one box)*

- ☐ Yes *(continue with question 3.6)*
- ☐ No *(continue with question 3.5)*

3.5 If the company didn't ask for an energy efficient solution: Why did you decide to offer the energy efficient solution and not the conventional one?

Please, describe your last subcontract in a public contract where you sold one of your conventional solutions

3.6 When did you sell the solution (MM/JJ)? _____

3.7 What did you sell?

3.8 Did the company ask specifically for the conventional solution? *(tick one box)*

- ☐ Yes *(continue with question 3.10)*
- ☐ No *(continue with question 3.9)*

3.9 If the company didn't ask specifically for the conventional solution: What were the reasons that you offered the conventional solution and not the energy efficient one?

3.10 If you take a look at the last 3 years – which s did you usually sell to your company clients? (tick one box)

- ☐ The conventional solutions (continue with question 3.11).
- ☐ The energy efficient solutions (continue with question 3.12).

3.11 If the answer is “the conventional solutions”: Could you tell us your opinion why you are not successful with your energy efficient solutions? (tick one or more boxes)

- ☐ Because we don't focus on our energy efficient solutions.
- ☐ Because our customers want to stick to “business as usual”.
- ☐ Because the energy efficient solutions are more expensive than the conventional solutions.
- ☐ Any other reasons: _____
- _____
- _____

3.12 If the answer is “the energy efficient solutions”: Could you tell us your opinion why you are successful with your energy efficient solutions? (tick one or more boxes)

- ☐ Because our customers ask for it.
- ☐ Because the energy efficient solutions are cheaper as the conventional solutions.
- ☐ Because we do our best to convince our customers that our energy efficient solutions are the best solutions.
- ☐ Because we are good at networking with other companies and public authorities.
- ☐ Any other reasons: _____
- _____
- _____

IV: For companies that do not work in public contracts

3. Question concerning the reasons for not selling to public authorities

3.1 Which are the reasons why you never offered your energy efficient solutions to public authorities? *(tick one or more boxes)*

- ☐ We can't invest the time to fill in the tender documents.
- ☐ We don't have the staff to fill in the tender documents.
- ☐ We have no infrastructure to take part in e-bidding that many public authorities practice.
- ☐ The awards of central procurement agencies are usually too big for our relatively small company.
- ☐ The tender documents usually ask for a specific, conventional solution that excludes our energy efficient solution.
- ☐ The tender documents usually don't authorise tenderers to submit variants.
- ☐ The public authorities don't take the life cycle costs (operation costs etc.) into account.
- ☐ Any other reasons: _____

4. Questions concerning overall hurdles

4.1 What are the main difficulties you encounter when you participate in a public tender?

(tick one or more boxes)

- ☐ We have difficulties to invest the time to fill in the tender documents.
- ☐ We don't have the staff to fill in the tender documents.
- ☐ We are too small to offer our solutions for the public tenders that usually ask for large quantities.
- ☐ Other: _____

4.2 Do you have suggestions for the simplification of the procedure? *(tick one or more boxes)*

- ☐ The amount of required documents should be reduced
- ☐ The tender documents should be shorter.
- ☐ The tender documents should be easier to understand.
- ☐ There should be a national contact that supports the tenderers in filling out the documents.
- ☐ Other: _____

4.3 Would you be prepared to offer a warranty for maintenance when offering energy efficient/green products, services or works? *(tick one box)*

- ☐ Yes, we already do.
- ☐ Yes, we would be prepared.
- ☐ No, because: _____

4.4 From your point of view, does the centralisation of public procurement (centralised agencies or joint procurement) support the selling of energy efficient solutions? *(tick one box)*

- ☐ Yes
- ☐ No
- ☐ Perhaps

Please explain your answer: _____

4.5 From your point of view, does the e-bidding-process in public procurement support the selling of energy efficient solutions (=products, services, works)? *(tick one box)*

- ☐ Yes.
- ☐ No.
- ☐ Perhaps.

Please explain your answer: _____

4.6 From your point of view: What should public authorities make different to make it easier for you to sell your energy efficient solutions (=products, services and works)?

4.7 What else would you need to realise more of your energy efficient solutions in public authorities?

4.8 Is there anything else that you would like to add?
