CE-PRINCE

D1.1.1-PublicSectorC/GPP Initial Assessment



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Section 1
Introduction



Introduction

The European Green Deal (2019) and the new Circular Economy Action Plan (2020) aim to deliver a sustainable, low carbon, resource efficient and competitive economy.
Adopting a circular economy de-couples resource consumption from economic growth, by extending product lifecycles through recycling, reusing, refurbishing and remanufacturing. This reduces reliance on imported and virginrawmaterials, mitigates pricevolatility,and creates new business opportunities.

Circular value chains are essential to achieving climate neutrality by 2050: «In a circular economy, carbon dioxide emissions would halve by 2030 and resource consumption by cars, construction materials, real estate land, synthetic fertilizer, pesticides, water use, fuels and non-renewable electricity could drop by 32% by 2030 and 53% by 2050, compared with today» (The circular economy index, 2016).

The Circular Economy Action Plan specifically calls out Green PublicProcurementasakeydriverinthe transitiontowardscirculareconomy:throughtheintegrationof«circulareconomyprinciples»,C/GPPseeks to leverage the purchasing power of the public sector to advance environmental policy objectives and achieve the market's goals of improved environmental, economic, and social sustainability, boosting the motivation for eco-innovation.

Introduction

CE-PRINCE's objective is to advance Circular Economy in Central Europe through Circular/Green Public Procurement to improve companies' circularity while reinforcing the public sector capacity to publish tenders containing more and more elements of circularity.

Since no common standards exist so far and requirements for incorporating circular criteria into public tenders vary from country to country, CE-PRINCE aims to standardise Circular Public Procurement approaches and standards across Central Europe. In order to make its adoption more homogeneous and consistent in the European context and to prevent distortion of the single market, uniform and quantifiable criteria for public tenders will be developed, emphasising circular economy aspects in new or updated sets of EU GPP Criteria.

This document presents the results of the Initial Assessment of the demand (Public Procurers) and supply (Enterprises), outlining the current state of Circular/Green Public Procurement (C/GPP) capacity Central Europe in both the public and private sectors. The initial assessment focuses on four targeted sectors – agri- food, manufacturing, construction, and local maintenance and enhancement from a tourism perspective. Following anapproachthatinvolvedeskresearchandsurveystoEnterprisesandPublicadministration,this analysis seeks to generate a deep understanding of how circular principles and practices are integrated into public procurement processes and the products/services offered by companies, along with the identification of barriers and drivers to circularity.

CE overview by country -Italy



- Public administrations

Italy's Action Plan for Green Public Procurement (PAN GPP), initiated in 2008 and updated in 2023, mandates the use of Minimum Environmental Criteria (CAM) in all public procurement processes, including those below EU thresholds. These criteria, covering 21 product groups, align with EU GPP and Ecolabel standards. The 2016 Public Contracts Code enforces CAM as a legal requirement, integrating Life Cycle Costing (LCC) into procurement practices.
Although Italy has a strong framework for green public procurement, it still faces challenges in evaluating the broader environmental outcomes of GPP

Sources:
https://gpp.mase.gov.it/CAM-vigenti
OECD (2023), GovernmentataGlance2023,OECD Publishing, Paris.

CE overview by country -Austria



- Public administrations

Austria's naBe Action Plan, revised in 2021, sets binding sustainable procurement criteria for federal entities, encompassing 16 product groups—10 based on EU standards. All federal ministries and bodies under the BVergG2018 law are required to implement these criteria, while other public institutions are encouraged to adopt them.
Austria has also established monitoring systems to evaluate its GPP practices, but challenges in regional coordination persist.

Sources:
https://www.nabe.gv.at/en/
https://www.bmk.gv.at/themen/klima_umwelt/nachhaltigkeit/beschaffung/nabe.html
OECD (2023), Government at a Glance 2023, OECD Publishing, Paris.

CE overview by country -Germany



- Public administrations

Germany's Federal Climate Change Act aims for a climate-neutral federal administration by 2030, emphasizing life cycle costing in procurement. The Sustainable Development Programme promotes the use of eco-labels like the Blue Angel and led to the establishment of the Interministerial Committee for Sustainable Public Procurement in 2022, which coordinates GPP criteriaacross variousgovernment levels.
However, the highly decentralized nature of its procurement system poses challenges in creatinguniformsustainability practicesacrossthefederal,state,andmunicipallevels.

Sources:
https://www.umweltbundesamt.de/sites/default/files/medien/479/publikationen/uba_flyer_green_public_procurement_eco-friendly_and_cost-saving.pdf
OECD(2023), GovernmentataGlance2023,OECDPublishing, Paris.

CE overview by country –Slovenia



- Public administrations

Slovenia's Green Public Procurement (GPP) Decree, updated in 2023, mandates EU-aligned environmental criteria for 20 procurement categories, including energy-efficient solutions for data centers and cloud services. The decree simplifies procedures to reduce administrative burdens and ensures compliance with Directive 2023/1791.
Nonetheless, practical implementation and administrative hurdles remain areas needing improvement.

Sources:
https://www.gov.si/en/topics/green-public-procurement
OECD (2023), Government at a Glance 2023, OECD Publishing, Paris.

CE overview by country -Hungary



- Public administrations

Hungary's Green Public Procurement Strategy for 2022-2027 aims to incorporate green aspects into at least 30% of public procurements by 2027, with higher targets for specific sectors. The strategy outlines intervention areas and tools to enhance GPP practices nationwide.
Despite this, Hungary's GPP framework lacks mandatory reporting and evaluation mechanisms, makingit challenging toassesstheimpactoftheseinitiatives.

Sources:
https://www.interreg-central.eu/news/green-public-procurement-and-the-state-of-green-cities-in-hungary/
OECD (2023), GovernmentataGlance 2023,OECD Publishing, Paris.

CE overview by country -Croatia



- Public administrations

Croatia's National Action Plan for Green Public Procurement, first adopted in 2015 and updated in 2021, mandates the application of EU-aligned GPP criteria in central procurement procedures for categories such as office supplies, computers, vehicles, and electricity. These criteria are integrated into technical specifications and award processes to promote sustainable procurement.
While the framework is well-structured, expanding these practices to all public sectors and improving reportingmechanismscould enhanceits effectiveness.

Sources:
https://www.csreurope.org/national-sdg-roundtable-green-public-procurement#:~:text=Less%20than%201%25%20of%20the,of%20green%20procurement%20in%20Europe.
OECD (2023), GovernmentataGlance2023,OECD Publishing, Paris.

CE overview by country -Poland



- Public administrations

Poland's State Purchasing Policy for 2022-2025 replaces the previous National Action Plan, encouraging public administrations to allocate 20% of their procurement budgets to innovative solutions, including green materials and services. While GPP application remains voluntary, the policy proposes developing a mandatory catalogue of products and services with GPP criteria. However, this voluntary approach results in inconsistent adoption across regions and sectors.

Sources:

https://digital-strategy.ec.europa.eu/en/news/poland-sets-targets-procurement-rd-and-innovative-solutions

OECD (2023), GovernmentataGlance2023,OECD Publishing, Paris.

Questionnaire Overview

The Initial Assessment has been conducted through an in-depth survey examining the dynamics of both the demand and supply sides.
The questionnaire surveys were developed based on a thorough review of relevant scientific and grey literature, focusing on measuring GPP implementation, circular economy performance, barriers and drivers, and organizational learning and adaptation. The questionnaires were designed in a complementary manner, ensuring that circular criteria in public tenders align with enterprises' circularity practices.

By analyzing the balance between circular demand and supply in both public and private sectors, this assessment outlines the current state of C/GPP implementation across Central Europe and evaluates circularity readiness. The tools developed as part of this project—targeted at public administrations (to strengthen C/GPP) and businesses (to improve circularity practices)—aim to support the transformation and advancement of the circular economy in the region.

After design, the questionnaire was reviewed by all CE-Prince project partners, who provided valuable feedback to improve the survey by modifying or rewording items to reduce potential bias and misleading question wording.

Public Administrations questionnaire overview

Section	Purpose
GPP Criteria	To evaluate the extent to which green criteria have been included into public tenders, considering different types of products, with a specific focus on integrating circular economy principles into the public procurement process.
Purchasing Methods	To assess the types of criteria used in public purchasing (e.g., EU GPP, Ecolabel) and the application of Life Cycle Costing (LCC) for GPP.
Barriers & Drivers	To identify the relevance of political, administrative, regulatory, and contractual barriers or drivers that hinder or boost PAs'ability to integrate green/circular criteria in public procurement.
Organizational Aspects	To assess the orientation of PAs towards GPP, including collaboration between various departments, information sharing, and the creation of common knowledge.
Organizational Culture	To investigate the adoption of Environmental Management Systems.
General Information	To gather general information on the respondents.

Survey Dissemination in public and private sectors

The survey was launched in mid-September 2024 and disseminated through the networks of project partners. Each partner

• Italy: For the private sector, Liguria Region and the Genoa Chamber of Commerce worked in synergy. Companies were selected focusing on sub sectors relevant to public procurement, specifically those offering services or goods already covered by existing environmental criteria. This selection was facilitated by matching NACE codes with environmental criteria, allowing to exclude enterprises producing items not currently aligned with GPP requirements. Geographically, the outreach was limited to the Liguria region, to accurately reflect the regional context and avoid distortions that could arise from engaging companies at the national level. Considering the region's economic structure, most of the enterprises targeted were micro or small-sized, with a few exceptions in the construction sector. The Chamber of Commerce facilitated communication by sending the survey through Certified Electronic Mail (PEC), while some enterprises with an established relationship with the Chamber were contacted directly via telephone or email to encourage their involvement. Regione Liguria sent out the survey through several mailing lists of enterprises that already participated in specific networks, projects and calls for grants related to sustainability. For the public sector, the focus was similarly concentrated on regional entities, including municipalities, the metropolitan city, and provincial administrations. Communication was primarily conducted through the GPP infoNet mailing list and a dedicated newsletter. Formal invitations, co-signed by the regional departments involved in the project, were also sent via PEC to reinforce the official nature of the outreach. Furthermore, public entities that already collaborate with the Environment Department were directly approached via telephone or email to ensure higher engagement and response rates.

Survey Dissemination in public and private sectors

- Croatia: The DURA agency conducted data collection across the entire NUTS2 region of Adriatic Croatia in the Republic of Croatia. Target companies were identified based on their geographic location and industry sector, focusing on tourism-related businesses such as accommodation services, food and beverage services, travel agencies, and tour operators. The selection included both companies with an active collaboration history and those without any prior partnerships. The survey link was distributed via direct emails, telephone calls, and newsletters. Targeted public authorities were located within the City of Dubrovnik and Dubrovnik-Neretva County, and all were actively involved in current collaborations. The survey link was shared through direct emails sent by the Director of DURA, followed by telephone calls as part of the follow-up process.

- Poland: ARMSA engaged a research company to reach their target audience. The Marshall Office facilitated contact with public institutions by distributing the survey link to the relevant entities.

- Hungary: ERI utilized its networks to reach targeted respondents, while STRIA collaborated with a professional research company. The selected companies were chosen based on their prior involvement in public procurement.

Survey Dissemination in public and private sectors

- Austria: For the private sector (enterprises), data collection focused on companies located in the Styria region. The primary approach involved leveraging contacts from internal databases, as well as utilizing partners and business connections. The survey link was distributed mainly via email, but newsletters and social media platforms (e.g., Facebook and LinkedIn) were also employed. The involvement of the Styrian Business Promotion Agency, which supports and funds local companies, greatly facilitated engaging participants. For the public sector (public administrations), efforts were also concentrated in the Styria region, using internal databases and business partners. The survey link was shared predominantly through email and newsletters, with telephone surveys considered if necessary. Additionally, the survey wording was simplified to encourage greater participation from public administrations, ensuring clarity and accessibility.

- Slovenia: CCIS conducted a nationwide dissemination of the questionnaire, targeting listed companies and both local and national public administrations. Distribution methods included emails, newsletters, website announcements, and social media posts. To improve response rates, telephone-based data collection was also utilized.

Survey Dissemination in public and private sectors

- Germany: ABW contacted public administrations and enterprises in their network from former projects and cooperations in the region. Due to low response rate, they the scope and sent the questionnaire directly to procurement departments in municipalities and municipal companies across sectors (f.e. utilities, transport, education, healthcare, culture). ABW selected public authorities by checking on-going tenders via the national procurement platform and their websites and selected enterprises by their capacity to attend tenders (i.e. size/scope, procurement department, public contracts). Despite extensive efforts, they encountered challenges due to low commitment from associated policy entities and lack of responses from the enterprises contacted.

Survey Dissemination in public and private sectors

The data collection phase successfully concluded in mid-November 2024, exceeding the response targets for both Enterprises (target: 300) and Public Administrations (target: 200). Specifically, 398 responses were collected from Enterprises and 232 from Public Administrations.

To ensure high-quality standards for data analysis, a data cleaning process was applied to the collected responses. This process considered the completion rate of the questionnaires and the number of "Not Applicable" (NA) entries. Specifically:

- Partially completed responses with insufficient data to evaluate the state of Circular Economy implementation/GPP implementation, as well as barriers and drivers, were excluded.
- Responseswithatleasttwosectionsentirelymarkedas"NA"werealsodiscarded.

This rigorous approach ensures that the analysis is both robust and meaningful, providing reliable insights into the dynamics of Circular Economy implementation and Green Public Procurement.

Following this process, the final sample includes 283 responses from Enterprises and 212 from Public Administrations, building a solid foundation for following analyses.

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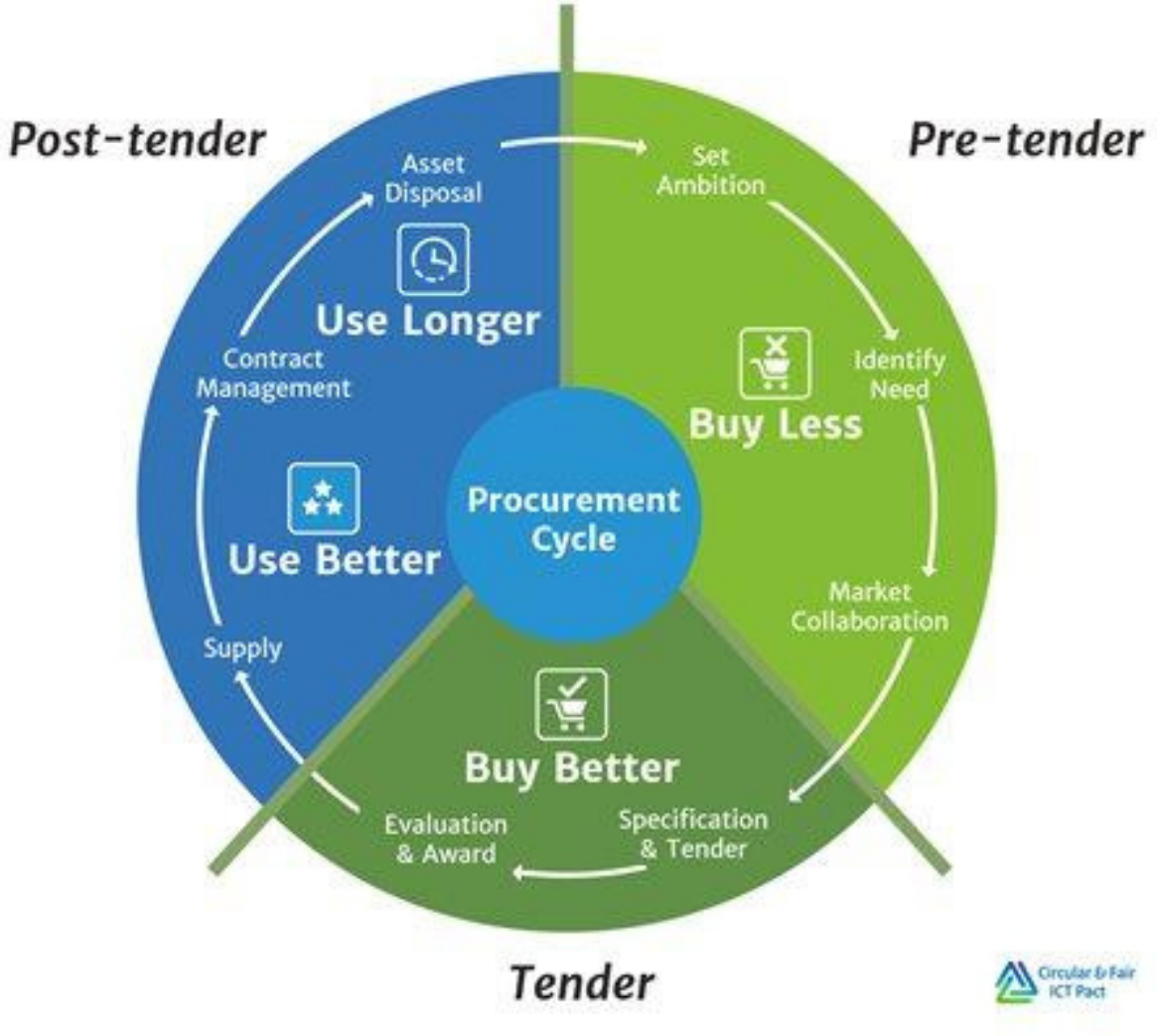
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Section 2
Circular Economy Demand



Circular Public Procurement

Circular Public Procurement is a green procurement approach that highlights the crucial role public authorities can play in driving the shift toward a circular economy. It involves the acquisition of works, goods, or services by public bodies that aim to foster closed loops of energy and materials within supply chains, while reducing – or ideally preventing – waste and environmental harm throughout their lifecycle. Expanding the adoption of Circular/Green Public Procurement is an objective of sustainable development policies as well as a strategic tool for their implementation. The growing demand for more sustainable products could stimulate the development of new markets or expansion of the existing markets for circular/green and innovative products and services. This also motivates businesses to invest in green technologies, leading to solutions that benefit both the environment and the economy.



Circular and Fair ICT Pact

GPP Policy frameworks overview

- Italy: First adopted in 2008, the Italian Action Plan for the Sustainability of Consumption in the Public Administration Sector (PAN GPP) has been recently revised in 2023. It defines GPP principles and Minimum Environmental Criteria (CAM) that the public procurer can include in the tender documents, and how to incorporate LCC in the procurement process. While initially voluntary, the Public Contracts Code in 2016 made CAM mandatory. The application of the Minimum Environmental Criteria set within the GPP NAP is mandatory for all kind of contracting authorities, for the whole value of the tender, and also for procurement below the threshold amounts fixed by the Directives on public procurement and concessions. As of today, Italy has developed 21 CAM for product groups which are priority sectors set in the National GPP Action Plan. EU GPP criteria and Ecolabel criteria represents the main reference documents.

- Austria: The Austrian Action Plan on Sustainable Public Procurement – naBe Action Plan – is binding for federal public procurers such as all federal Ministries and the central purchasing body, the Federal Procurement Agency. In 2021, the Federal Government adopted the updated naBe action plan including the naBe core criteria for 16 product groups, 10 of which are based on the Commission's criteria and 6 are developed additionally. The federal public procurers have to include these environmental criteria in their tenders. All other public entities, which are subject to federal procurement law (BVergG2018), like federal states, cities, municipalities and other public institutions, are advised to use the criteria as well.

GPP Policy frameworks overview

- Germany: According to the Federal Climate Change Act, which sets the overarching goal of a climate-neutral Federal Administration by 2030, all authorities at federal level must use life cycle costing in their procurement procedures to ensure energy-efficient and environment-friendly public procurement. The German Sustainable Development Programme of Measures, which was last revised in 2021, also aims at ensuring a climate-neutral federal administration by 2030, and promotes the use of sustainable public procurement, including GPP, at the level of the Federal Government. The Programme states that federal authorities are committed to sourcing products with the German Blue Angel ecolabel wherever possible. The German Sustainable Development Programme of Measures sets the basis for the creation of the Interministerial Committee for Sustainable Public Procurement, established in June 2022. Its tasks include the identification of priority products and services for sustainability purposes, the definition of sustainability criteria and requirements for public procurement at the federal level. Due to Germany's highly decentralized procurement system (federal, states and municipal level), the Committee also steers and co- ordinates measures to promote a practice of sustainable procurement that is as uniform as possibleacross Germany.

GPP Policy frameworks overview

- Slovenia: The Decree on Green Public Procurement was adopted in 2012 and last revised in 2023. The GPP Decree requires contracting authorities to include minimum and additional environmental criteria, based at great extent on EU GPP criteria, for 22 different procurement categories. The Government has prepared a draft proposal to amend and supplement the Regulation: requirements from Directive 2023/1791 will be transposed into the Regulation, ensuring that contracting authorities apply the principle of «energy efficiency first» when awarding public contracts. Furthermore, mandatory compliance with the regulation is expanded to new objects such as data centers, server space and cloud services. The regulation also provides for the simplification of procedures for clientsto reduce administrative obstacles and offer clearer guidelines for the use of green criteria in public procurement.

- Hungary: Hungary's Green Public Procurement Strategy for 2022-2027, adopted in 2022, contains an action plan that defines the areas of intervention and the tools to be used. It sets the goal that by 2027 the number of domestic public procurements containing green aspects will reach at least 30% of the total number of public procurements. But the strategy also foresees that in some sector-specific regulations, in relation to some products and product groups, a different – higher, even 100% – target may apply.

GPP Policy frameworks overview

- Poland: The National Action Plan on Sustainable Public Procurement, which integrated the EU GPP Directives, was adopted in 2017 and was in force until 2020. However, Poland decided not to continue it, and replaced it with a general State Purchasing Policy for 2022–2025. It advises all public administrations to allocate 20% of their purchasing budget to the public procurement of "innovative" solutions, which may include green materials and services. Up till now, the Public Procurement Office has been promoting the overall application on the voluntary basis of EU GPP criteria. The State Purchasing Policy foresees the development of a catalogue of products and services which would make the inclusion of GPP criteria mandatory.

- Croatia: The National Action Plan for Green Public Procurement was first adopted in 2015, and it identifies priority products groups for which GPP criteria have been developed at national level, fully based on EU GPP criteria. In May 2021, the Government adopted the Decision on Green Public Procurement in Central Procurement Procedures defining that the Central State Office for Central Procurement is required to apply GPP criteria in procurement procedures as part of the technical specification and/or award criteria. The obligation concerns primarily the purchasing categories of office supplies, consumables, computers and computer equipment, motor vehicles and the supply of electricity.

GPP Policy frameworks overview

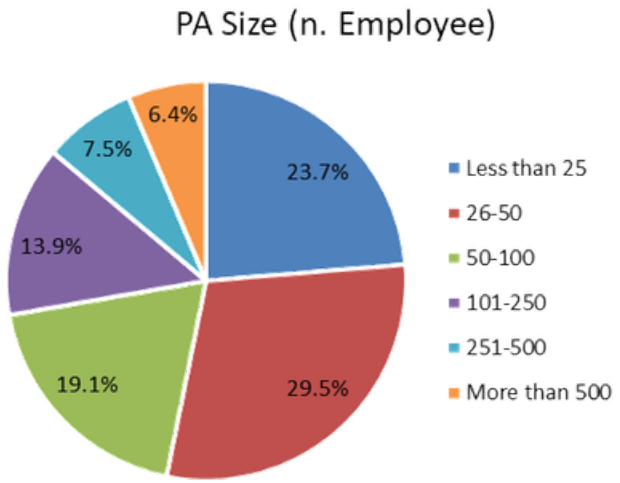
On the demand side (Public Procurers), a questionnaire survey was designed and disseminated to outline the currentstateof Circular/Green Public Procurement (C/GPP)implementation inthepublic sectoracross Central Europe, as well as the main barriers that need to be overcome in order to boost its adoption.

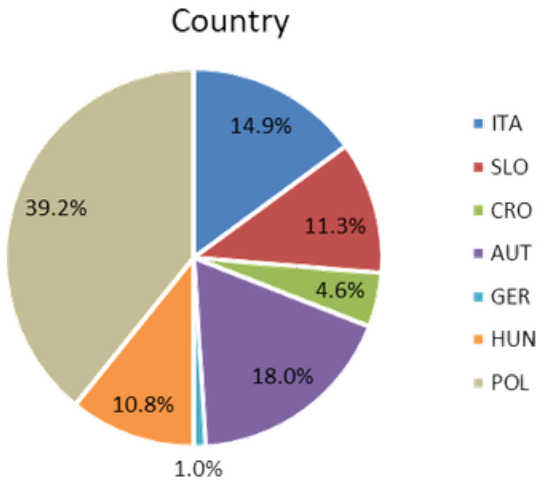
The questionnaire covers varioussections, including:

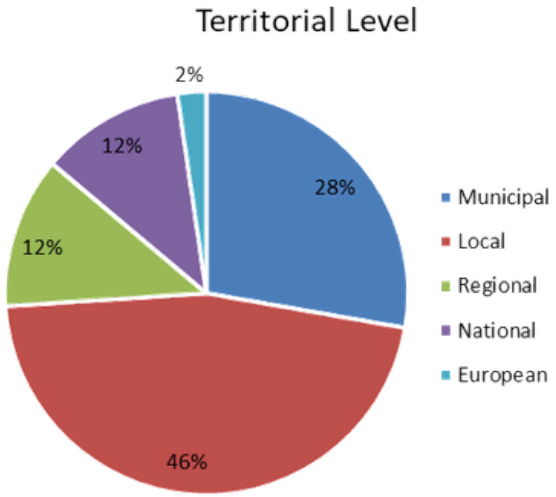
- Environmental Management Systems adoption
- Circular/Green Public Procurement implementation
- Barriers and driversto implementing GPP
- Suppliers knowledge
- Organizational learning and adaptation dynamics

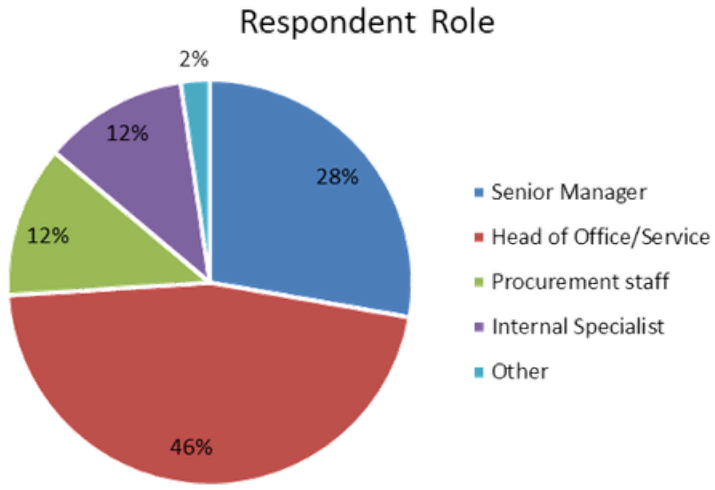
This presentation outlines the results related to each of these aspects investigated in the questionnaire.

Sample Description









The surveyed Public Administrations (PAs) constitute a sample with specific characteristics in terms of size, territorial level, and respondent roles.

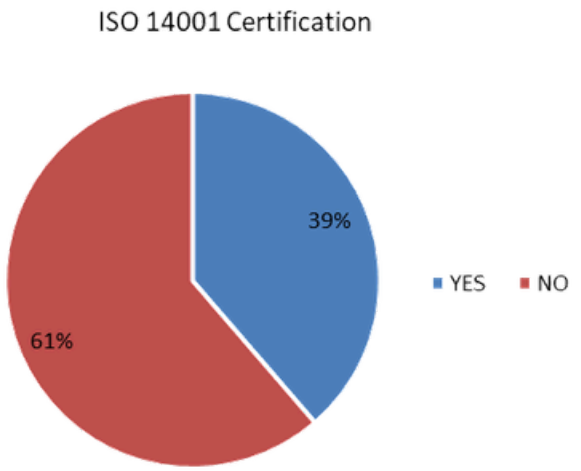
- MostPAsaresmalltomid-sized,with29.5%having 26-50 employees and 23.7% employing fewer than 25 staff. In total, nearly three-quarters of the surveyed PAs have fewer than 100 employees, although the sample also includes a significant proportion (14%) of large PAs.

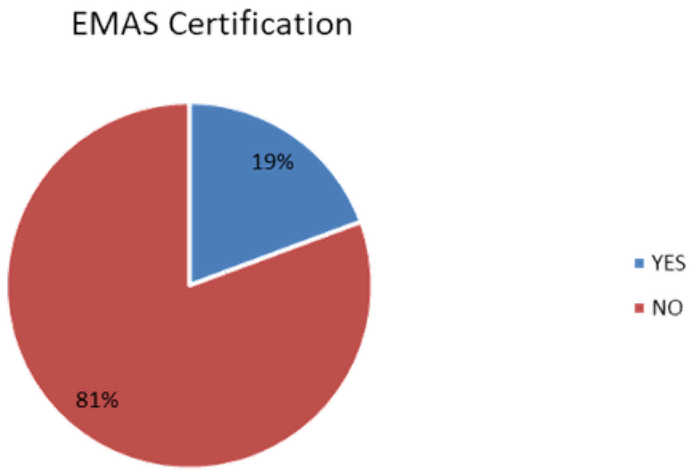
- WhilealargeshareofresponsescamefromPoland (39%), other countries are well-represented relative to their target populations. However, responses from Germany were limited, accounting for just 1% of the sample.

- At the territorial level, 46% of PAs operate at the local level, while municipal (28%) and regional (12%) administrations also contribute significantly to the dataset, indicating a strong focus on sub-national governance entities.

- Intermsofrespondentroles,nearlyhalf(46%)are Heads of Office/Service (28%). This suggests the survey engaged a respondent pool with substantial decision-making authority in public procurement processes.

Sample Description (Certification)





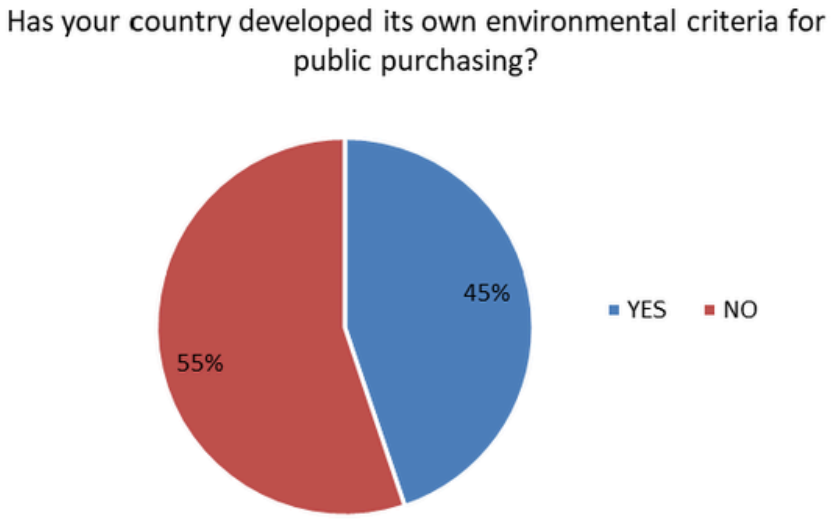
The data highlights a notable difference in the adoption of environmental certifications among the surveyed PAs. ISO 14001 certification is more prevalent, with 39% of PAs holding this certification, compared to only 19% having EMAS certification.
This indicates that ISO 14001, being more widely recognized and less demanding than EMAS, is the preferred standard for integrating environmental management practices in public administrations. However, the relatively low overall adoption of certifications suggests room for improvement in formalizing environmental management systems across PAs.

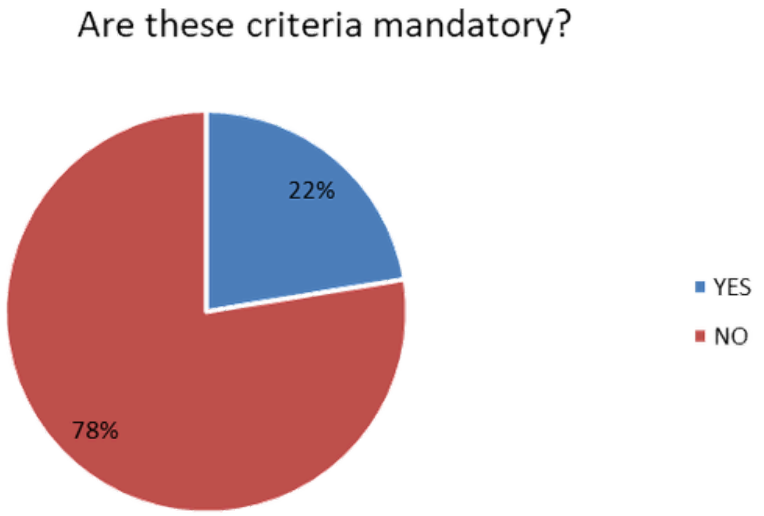
GPP National Context

The table provides highlights the presence of a National Strategy or Action Plan for Green Public Procurement (GPP) and the inclusion of mandatory GPP criteria in each Partner Country and their timeline (milestones.)

Country	GPP Policy	Mandatory GPP Criteria	Milestones
Italy 	Yes	Yes	2008: Voluntary action plan (PAN GPP). 2016: Made mandatory through the Public Contracts Code. 2021: Updated naBeAction Plan adopted, binding for federal public procurers.
Austria 	Yes	Yes	2021: Last revision of the German Sustainable Development Programme of Measures promoting GPP. 2022: Interministerial Committee for Sustainable Public Procurement established.
Germany 	Yes	No	2012: Decree on Green Public Procurement adopted. 2023: Revised to include new criteria and mandatory compliance for additional areas.
Slovenia 	Yes	Yes	2015: National Action Plan for Green Public Procurement adopted. 2021: Decision on Green Public Procurement in Central Procurement Procedures made GPP criteria mandatory for certain categories.
Croatia 	Yes	Yes	2017: National Action Plan on Sustainable Public Procurement adopted (valid until 2020). 2022: State Purchasing Policy for 2022–2025 introduced, encouraging voluntary application of GPP criteria.
Poland 	Yes	No	2022: Green Public Procurement Strategy for 2022–2027 adopted.
Hungary 	Yes	Yes	

GPP National Context





Although policy frameworks related to Green Public Procurement are in place across all the seven Countries, the data reveals significant disparities in the adoption of environmental criteria.

The data reveals inconsistency particularly evident in the percentage of mandatory GPP criteria within the Partner Countries compared to existing policy frameworks (see table above), which may be related to several reasons:

- Lackofknowledgefrompublicadministrations.
- The fragmentation caused by variations in the product and service categories prioritized and covered by mandatory compliance in each Country.
- Most responses were provided by public administrations operating at the local and municipal levels, and the procurement policies in some countries impose varying levels of compliance for sub-national entities (e.g., Austria, Germany).

The identified divergences highlight the need for greater harmonization and standardization of GPP approaches and standards to make its adoption more homogeneous and consistent in the European context .

GPP Criteria Implementation

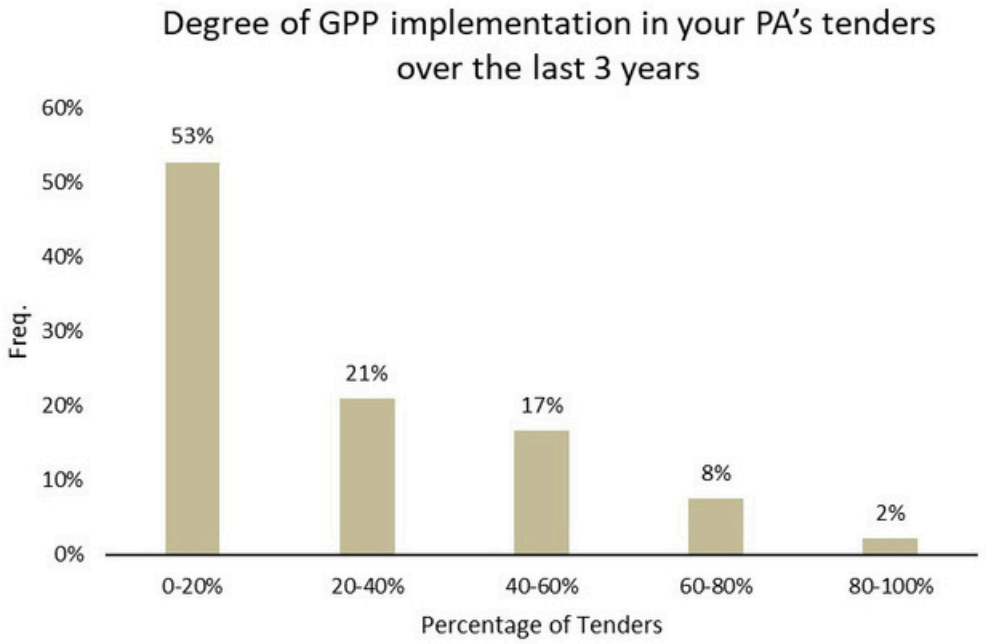
The European Union Green Public Procurement (EU GPP) represents a voluntary instrument developed to encourage public administrations across Europe to integrate environmental criteria into their purchasing processes. By embedding these criteria, public entities can lead by example, driving the market toward more sustainable and environmentally friendly products and services. The EU GPP aims to reduce the environmental impact of public procurement and foster the transition to a circular economy.

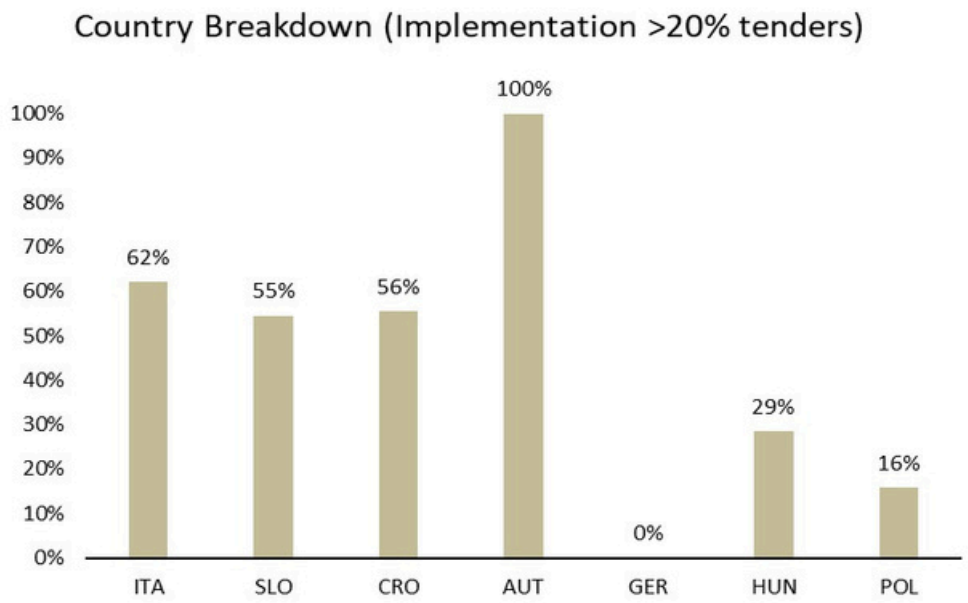
The EU GPP provides a structured set of green criteria for specific product and service categories, making it easier for public administrations to incorporate sustainable practices into their procurement strategies. These criteria cover a wide range of categories, such as IT equipment, energy sources, furniture, textiles, and construction services, ensuring that environmentally friendly options are available for various public needs.

The initial assessment aim to investigate the extent to which green and circular criteria have been applied in different product groups over the past three years. Specifically, understanding which categories are most frequently targeted with green criteria allows us to identify trends and potential gaps in sustainable procurement practices among public administrations.

The following analysis highlights the procurement activities where GPP is more widely adopted and areas that may benefit from further integration of green criteria.

GPP Criteria Implementation





Distribution of tenders integrating GPP criteria.

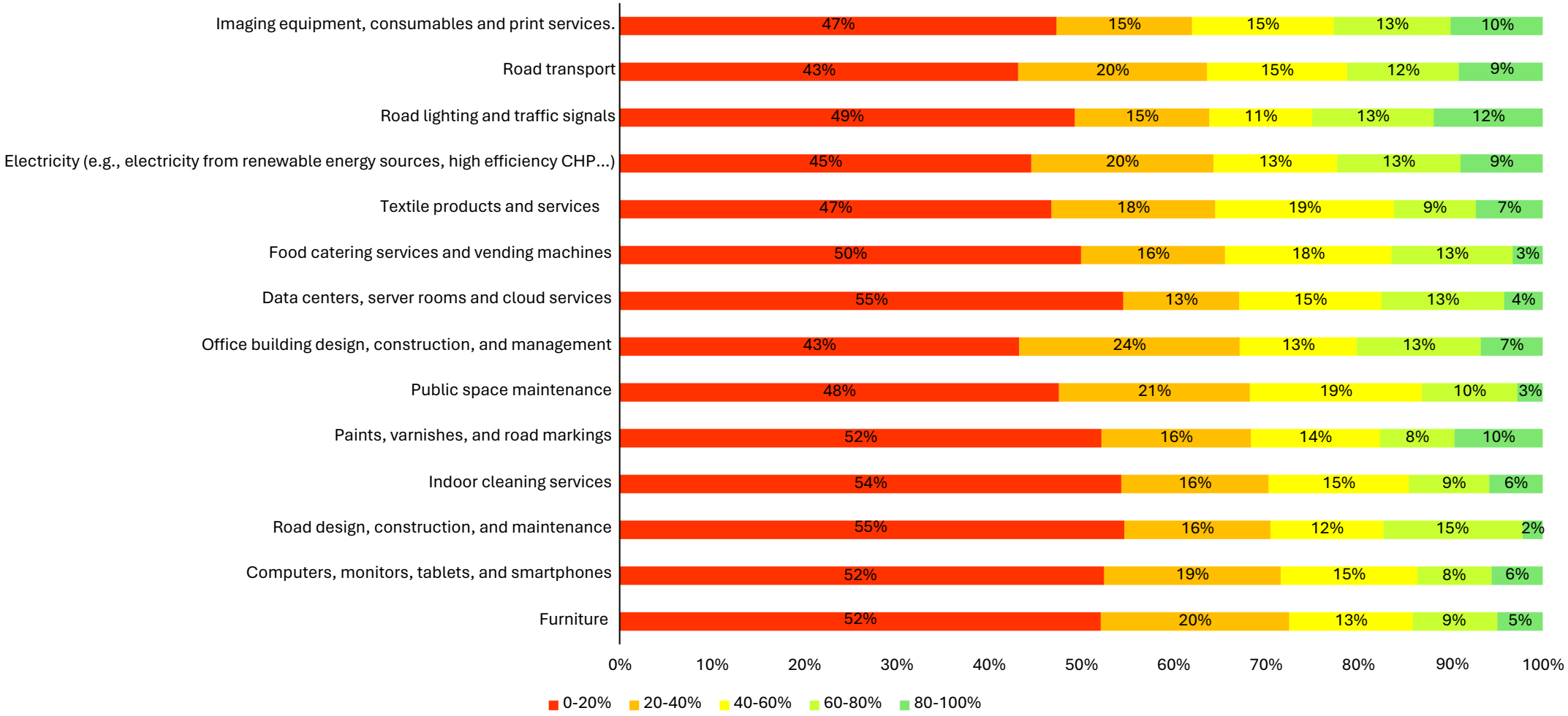
The results show that 53% of Public Administrations reported that only 0-20% of their tenders included GPP criteria, indicating that green criteria are still not widely adopted. In contrast, only 2% of PAs reported implementing GPP criteria in 80-100% of their tenders, reflecting significant room for improvement in embedding green considerations into procurement processes.

Country-level breakdown of PAs that have implemented GPP criteria in more than 20% of their tenders.

Austria leads the way, with all surveyed PAs reporting GPP integration above this threshold, followed by Italy (62%), Slovenia (55%), and Croatia (56%). In contrast, adoption remains limited in Hungary (29%), Poland (16%), and Germany (0%), highlighting disparities in GPP practices across Central European countries.

EU GPP Criteria Integration in Public Tenders

To what extent have EU GPP criteria for the following product groups been inserted in tenders over the last 3 years?



EU GPP Criteria Integration in Public Tenders

The results highlight considerable disparities in the integration of EU GPP criteria across different product and service categories over the last three years.

- LowIntegration(0-20%):SeveralcategoriesshowparticularlylowintegrationofGreencriteriainPP.Forinstance,furniture (52%), data centers, server rooms, and cloud services (55%), and food catering services and vending machines (50%) have the highest shares of tenders with minimal implementation. These areas could benefit from targeted policy interventions to boost adoption.

- ModerateIntegration(20-60%):Certaincategories,suchaselectricity(45%inthe0-20%range),roadtransport,androad lighting and traffic signals, show a notable shift towards moderate integration levels. Around 40-60% of tenders for these categories include green criteria, suggesting progress but with room for more consistent application.

- HigherIntegration(>60%):Productgroupslikecomputers,monitors,tablets,andsmartphones,indoorcleaningservices, and road design, construction, and maintenance exhibit stronger integration, with approximately 30% of tenders achieving integration at levels higher than 60%. These categories can serve as benchmarks for others.

- CriticalGaps:Textileproductsandfoodcateringservicesstandwithover50%oftenderswiththelowestadoption(0- 20%), underscoring the need for targeted efforts to improve integration. Similarly, high reliance on non-green procurement for furniture and cloud services highlights challenges in aligning these categories with sustainability goals.

- EncouragingTrends:Positiveexamples,suchastheincreasinguseofGPPcriteriainroadinfrastructureandITequipment, reflect growing awareness.

GPP Criteria Implementation

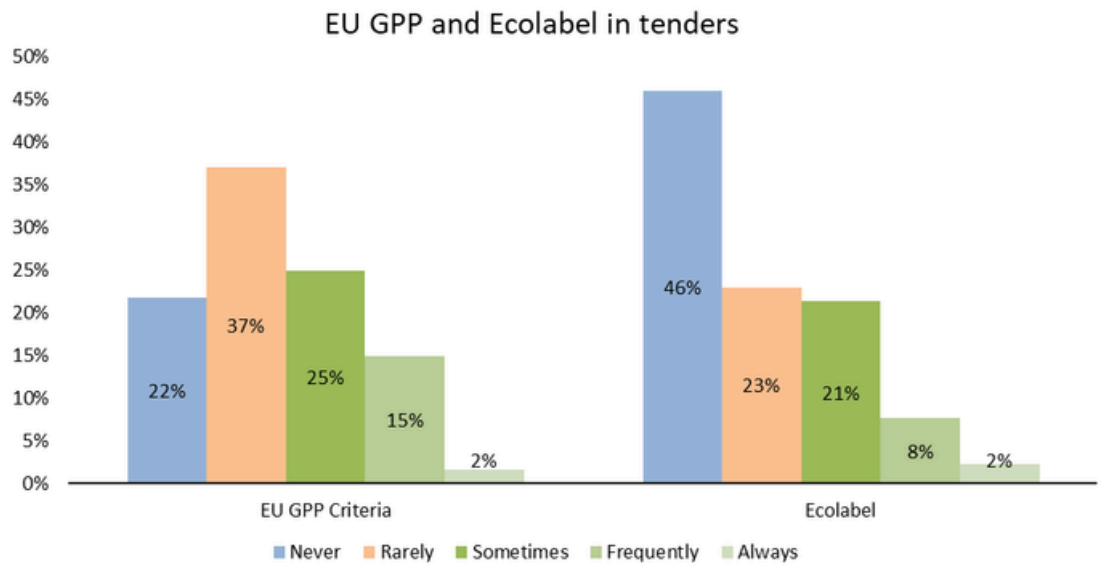
Public entities have several tools at their disposal to make procurement more sustainable. The EU Green Public Procurement criteria and the European Ecolabel are two widely recognized frameworks that provide standardized guidelines for environmentally responsible purchasing. Their integration into tenders can ensure that sustainability requirements are met consistently across sectors.
Moreover, environmental criteria can be embedded throughout the tendering process, from technical specifications—detailing

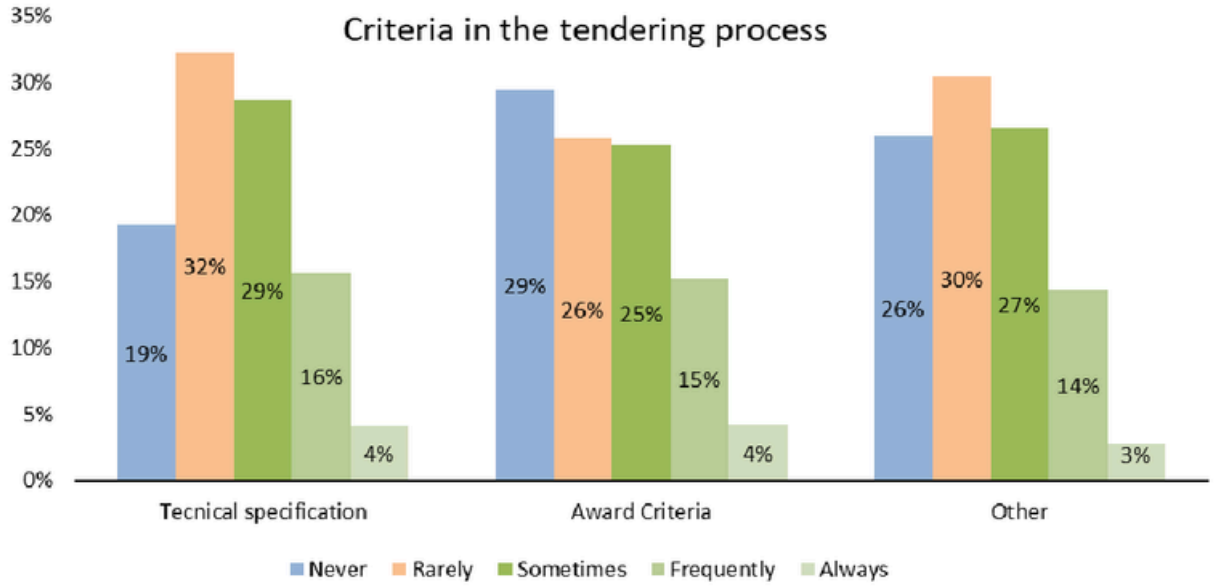
the required sustainability features of products and services—to award criteria, which prioritize eco-friendly options during the evaluation of bids. Other stages, such as selection criteria and contract performance clauses, also offer opportunities to reinforce sustainable purchasing practices.

The purchasing methods used in public procurement can significantly impact the adoption of sustainable practices, particularly considering how public administrations incorporate environmental criteria at different stages of the tendering process, enabling them to select suppliers and products that align with green and circular economy goals.

By assessing the extent to which these tools and criteria are used, it is possible to gain insight into how public administrations are currently leveraging their procurement processes to support environmental objectives. The findings in the next slide highlight the areas where green criteria are well-established, as well as opportunities to further enhance sustainability in public tendering.

GPP Criteria Implementation





EU GPP and Ecolabel in tenders.

EU GPP Criteria are moderately integrated, with 37% of tenders rarely using them and 25% integrating them sometimes. However, only 2% of tenders systematically incorporate GPP criteria, showing significant room for improvement. Conversely, the use of the Ecolabel is limited, as 46% of respondents never include it in their tenders, underscoring its underutilization as a tool to promote environmental sustainability.

Criteria in the tendering process

Environmental criteria are primarily applied in technical specifications (29% frequently, 16% always), indicating their role in defining minimum sustainability requirements. However, their inclusion as award criteria and in other stages is less frequent, with over 50% of respondents rarely or sometimes applying them. This suggests that there is less emphasis on rewarding sustainable solutions during bid evaluation or throughout the contracting process.

Circular Economy Criteria Implementation

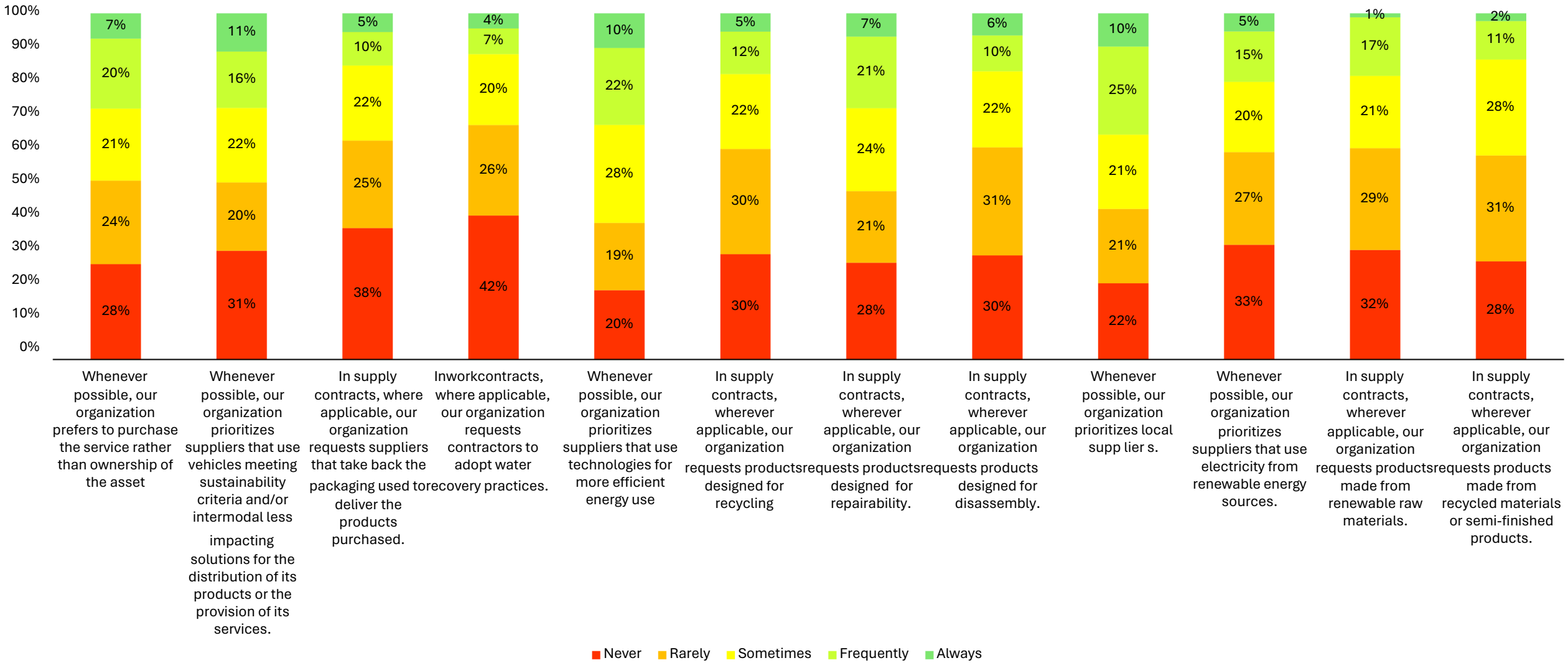
As public procurement evolves, there is a growing emphasis on embedding Circular Economy principles into purchasing decisions. The circular economy model prioritizes resource efficiency by focusing on strategies such as reuse, repair, recycling, and sustainable sourcing. By incorporating these principles into public procurement, public administration can significantly stimulate supplier organization to reduce waste, extend product lifecycles, and promote sustainable practices within their supply chains.

The initial assessment examines the extent to which public administrations are actively integrating circular economy criteria into their procurement processes. These criteria include specifying requirements for products made from recycled or renewable materials, prioritizing suppliers that use renewable energy or energy-efficient technologies, and requesting products designed for disassembly, repairability, and recyclability. Additionally, there is a focus on promoting sustainable logistics, water conservation practices, and favoring services over ownership to optimize resource use.

Assessing the adoption of circular economy criteria helps understand how public organizations are leveraging their purchasing power to drive sustainable transformation in the marketplace. The results presented in the following slide offer insight into the current level of circularity in public procurement and highlight areas where further integration of circular principles could be beneficial.

Circular Economy Criteria Implementation

To what extent does your organization integrate Circular Economy principles as criteria or technical specifications into Public Procurement processes?



Circular Economy Criteria Implementation

The integration of CE principles remains inconsistent across different aspects. Practices like prioritizing local suppliers or suppliers using vehicles meeting sustainability criteria show relatively higher integration, whereas others, such as requiring water recovery practices or take-back systems for packaging, lag behind. These differences suggest a fragmented approach, with some areas perceived as more feasible or beneficial than others. Notably, despite differences across specific circular practices, the overall analysis reflects a generally low attention to CE principles, with an average of only 22% of practices being systematically adopted (frequently or always). This highlights the need for greater commitment to embedding circularity into public procurement.

- Thehighestlevelsofadoption(freq.+always)areforprioritizinglocalsuppliers(36%)andsuppliersmeetingsustainability criteria or using intermodal solutions (31%). These aspects are likely seen as manageable within existing procurement frameworks and offer clear benefits, such as reduced emissions and support for regional economies. Similarly, criteria like requesting recyclable products (30%) and products designed for repairability (28%) reflect growing awareness of sustainability in product lifecycles, especially where practical solutions are readily available.

- Manypracticesareonlymoderatelyintegrated(rarely+sometimes),reflectingpartialbutinconsistentadoption.Forinstance, requesting products made from recycled materials or semi-finished products (58%) and renewable raw materials (60%) are moderately integrated, possibly due to challenges in market availability or additional costs. Similarly, prioritizing suppliers that use energy-efficient technologies (59%) and electricity from renewable sources (62%) indicates that while sustainability goals are acknowledged, systemic barriers may prevent full adoption. The moderate adoption of disassembly-oriented designs (53%) highlights the complexity of ensuring circularity at the end of the product lifecycle.

- SeveralCEpracticesseelowornegligibleadoption(never),indicatingsignificantchallenges.Forexample,waterrecovery practices in work contracts are never included by 42% of PAs, reflecting either a lack of awareness or perceived irrelevance in certain procurement contexts. Similarly, 38% of PAs never require take-back systems for packaging, suggesting logistical difficulties or insufficient supplier capabilities. The low integration of service-based models (e.g., purchasing services rather than assets) by 28% of respondents highlights potential cultural or organizational resistance to transitioning from traditional ownership models.

Barriers

While Green Public Procurement holds significant potential for advancing sustainability goals, public administrations often face multiple challenges in embedding green and circular criteria into their procurement processes. Understanding these barriers is essential to identify areas where support, resources, or policy adjustments are needed to facilitate the transition towards more sustainable public purchasing.

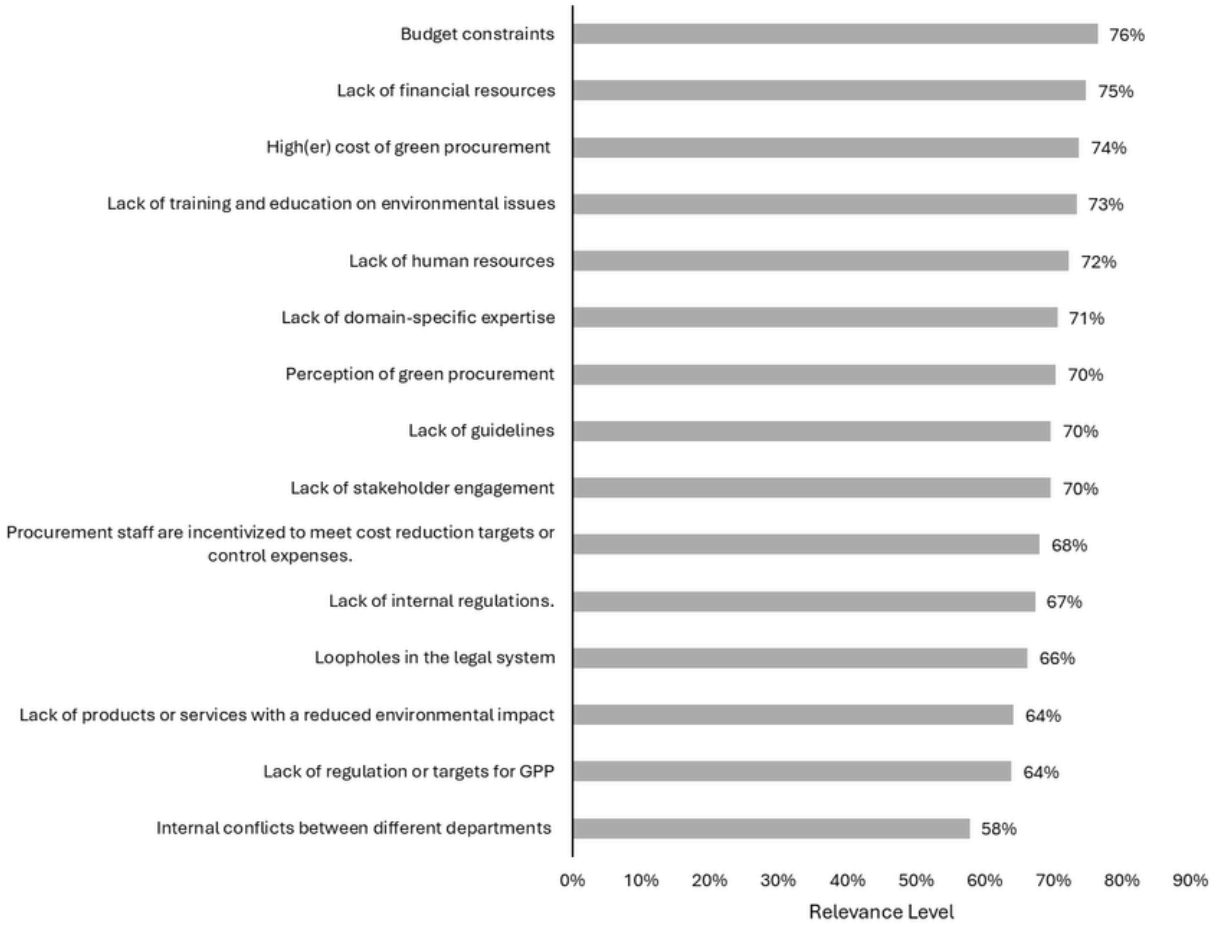
Public administrations encounter a variety of regulatory, financial, organizational, and market-based barriers. For example, the lack of clear regulations and targets for green procurement or loopholes in the legal system can create ambiguity, making it challenging for procurement officers to enforce sustainability criteria. Financial constraints, including high costs associated with green products and limited budgets, also limit the extent to which public bodies can prioritize environmentally friendly options.

Organizational and knowledge-related barriers further complicate the implementation of GPP. Administration could face a lack of training and expertise in environmental issues, as well as limited human resources to manage green procurement processes effectively. Additionally, internal conflicts between departments and a lack of stakeholder engagement can hinder coordination and the practical application of circular criteria. Finally, market barriers such as the limited availability of green products and services restrict public bodies' options, often forcing them to compromise on sustainability goals.

By assessing the impact of these barriers, it is possible to gain insights into the key obstacles to GPP adoption and identify where targeted interventions could enhance the effectiveness of green public procurement initiatives.

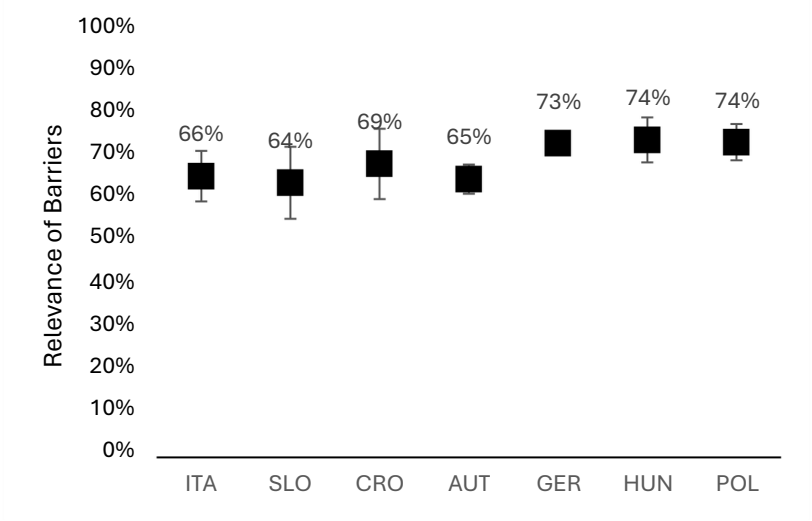
Barriers

The following graph highlights the main barriers faced by PAs when defining green criteria in tenders, particularly regarding the integration of circular economy principles. The findings reveal a relatively uniform perception of barriers, with no single issue standing but several clusters emerging as particularly significant:



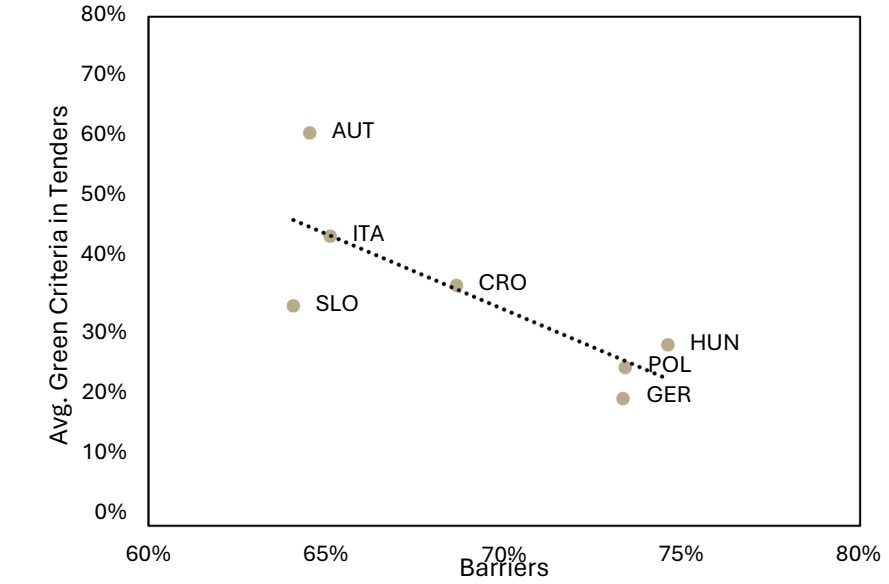
- Financial and economic barriers dominate, with budget constraints (76%), lack of financial resources (75%), and the higher cost of green procurement (74%) being the most pressing challenges. This underlines the critical importance of addressing financial capacity in promoting sustainable and circular procurement practices.
- Organizationalandknowledge-relatedbarriers,suchasthelack of training on environmental issues (73%), limited human resources (72%), and domain-specific expertise (71%), also feature prominently. These findings suggest a need for targeted capacity-building initiatives to equip procurement teams with the skills and resources needed for GPP.
- Regulatorybarriers,includingthelackofclearguidelines(70%), perception of green procurement (70%), and loopholes in the legal system (66%), point to the necessity of streamlining policies and providing clearer regulatory frameworks.
- Interestingly,barrierssuchasthelimitedavailabilityofgreen products (64%) and lack of regulations for GPP (64%) highlight persistent market and policy gaps.
- The lowest ranking (58%) - still high - concerns internal conflicts between departments, indicate that, while less critical than financial or regulatory issues, remains a factor that should not be overlooked.

Impact of Barriers on Circularity Performance



Barrier's breakdown in countries

The analysis of barri ers across countries highlights notable variations in their perceived relevance. In particular, while all countries report significant barriers, the average relevance scores range from 64% in Slovenia to 74% in Hungary and Poland. These differences may reflect variations in regulatory environments, resource availability, or institutional capacity, as well as in financial and economic context of PAs.



Barriers vs. Green criteria integration in tenders

There is a negative correlation between the average relevance of barriers and the integration of green criteria in tenders. Countries like Austria, which report lower barrier relevance (65%), achieve higher green criteria integration (above 50%), whereas countries like Hungary, Poland, and Germany, with barrier relevance exceeding 73%, demonstrate lower green criteria integration (below 30%). This inverse relationship underscores the critical role of addressing barriers to unlock greater adoption of green procurement practices. Countries with lower barriers may benefit from more advanced GPP frameworks and greater organizational readiness.

Drivers

While Green Public Procurement presents numerous challenges, there are also significant drivers that motivate public administrations to integrate sustainable criteria into their procurement processes. These drivers stem from various sources, including external pressures, organizational goals, and financial incentives, all of which contribute to fostering a culture of sustainability within public procurement.

A key driver is the pressure from stakeholders, such as suppliers, citizens, NGOs, and employees, who increasingly demand that public organizations adopt greener practices. Suppliers may encourage the adoption of new technologies, while citizens and environmental groups push for procurement practices that align with community values and sustainability goals.

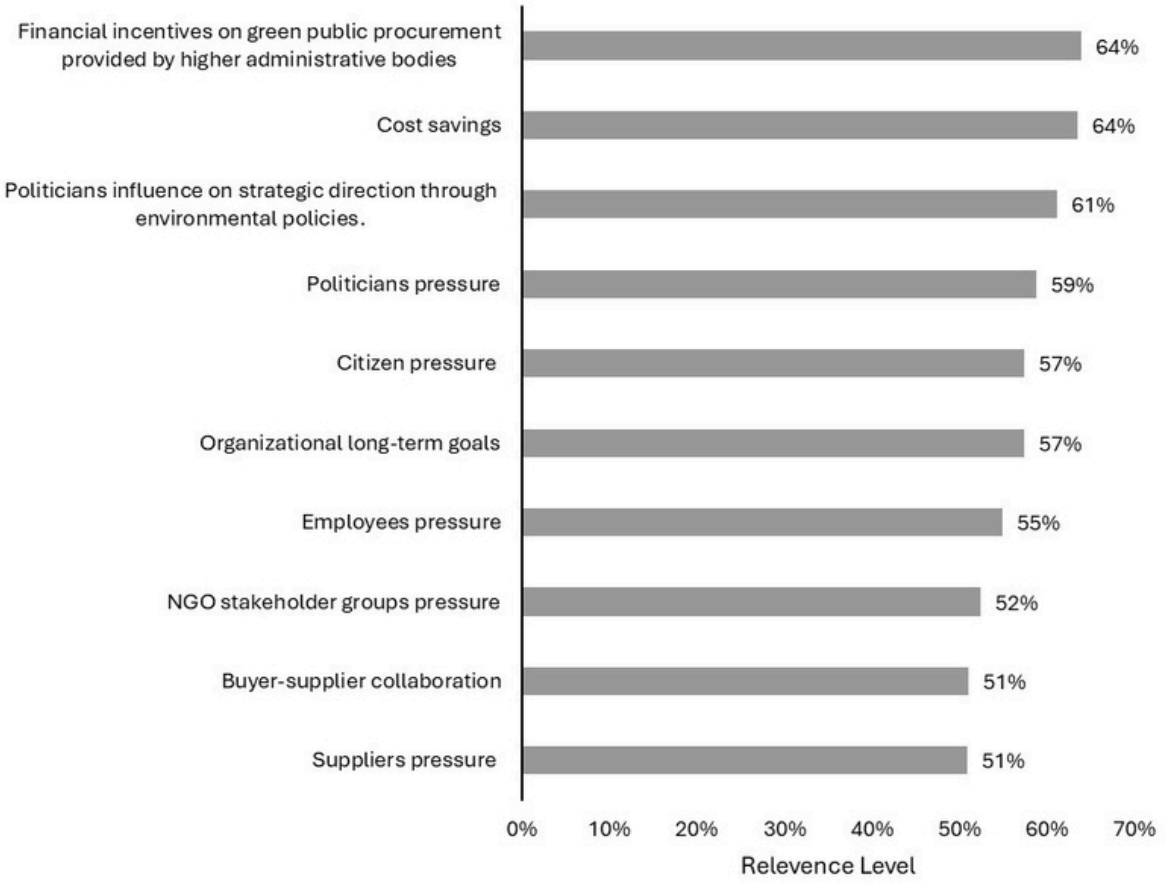
Political and regulatory influences also play a central role. Politicians and policymakers can drive GPP by setting national targets and environmental policies that prioritize sustainable procurement. This top-down pressure creates an environment where public administrations are encouraged to align their procurement strategies with legislative goals for sustainability.

Additionally, financial incentives and cost savings are strong motivators for GPP. Government bodies may offer incentives for adopting green procurement practices, and choosing environmentally friendly options, such as renewable energy, can lead to cost reductions in the long term. Moreover, public administrations may be motivated by their long-term organizational goals to create social value and environmental benefits, even if that means incurring higher upfront costs.

Understanding these drivers provides insight into the factors that enable and accelerate the adoption of GPP, highlighting the potential levers for encouraging more sustainable procurement across public organizations.

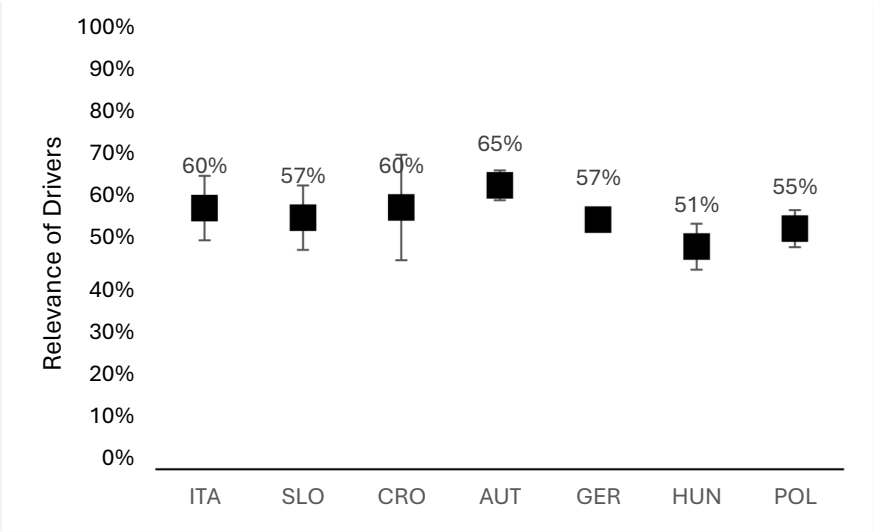
Drivers

The following graph outlines the key drivers that motivate PAs to define green criteria in public procurement tenders, particularly focusing on the integration of circular economy practices.



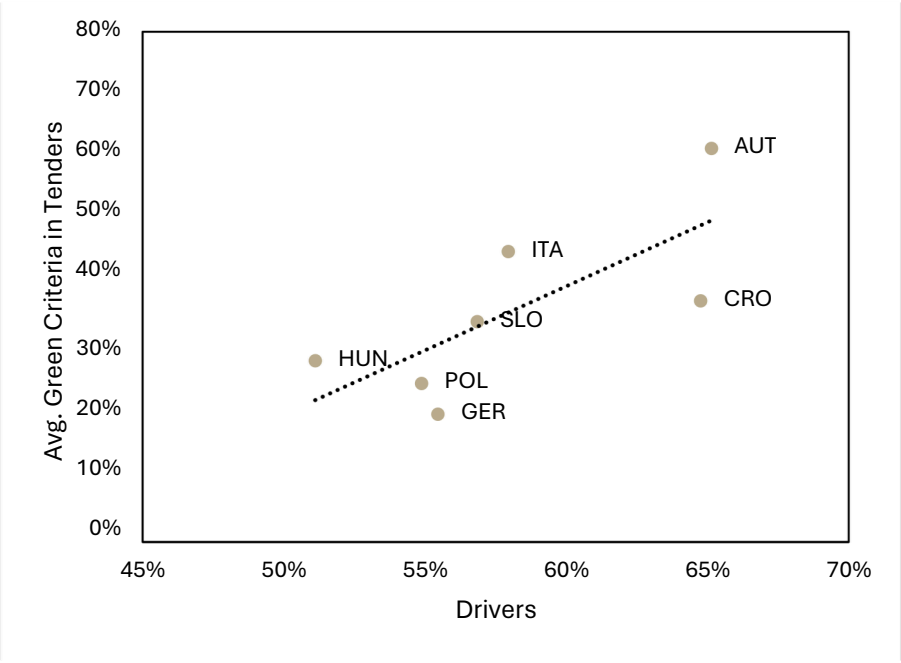
- Financial incentives and cost savings emerge as the most impactful drivers, each rated as highly relevant by 64% of respondents. These findings underscore the importance of economic benefits in motivating GPP adoption, especially in contexts where budget constraints are a key barrier.
- Politicalandregulatoryinfluencesalsoplayasignificantrole,with the influence of environmental policies (61%) and direct pressure from politicians (59%) ranking among the top drivers. This indicates that top-down approaches, such as setting clear legislative targets and policies, are critical for creating an enabling environment for GPP.
- Stakeholder pressures, including those from citizens (57%), employees (55%), and NGOs (52%), highlight the growing societal expectation for sustainable practices. These drivers reflect a shift in public perception, where environmental responsibility is increasingly seen as a mandate for public administrations.
- Organizational long-term goals suggest that many PAs are motivated by internal strategies aimed at creating long-term social and environmental value, beyond immediate financial or regulatory pressures. However, drivers related to direct collaboration with suppliers appear less influential. This may indicate a missed opportunity to leverage innovation and aligning procurement with sustainability goals.

Impact of Barriers on Circularity Performance



Driver's breakdown in countries

The analysis of drivers across countries reveals meaningful variations in their perceived relevance. Austria stands out with the highest average relevance score (65%), suggesting strong institutional support, financial incentives, and political influence for GPP. Conversely, Hungary (51%) and Poland (55%) report the lowest drivers relevance levels, reflecting varying policy frameworks, economic priorities, and levels of stakeholder involvement across countries, shaping the effectiveness of GPP adoption.



Drivers vs. Green criteria integration in tenders

There is a positive correlation between the perceived relevance of drivers and the average adoption of green criteria in tenders. Countries with higher driver relevance, such as Austria, exhibit higher levels of green tender integration. Conversely, Hungary, Poland, and Germany, with lower driver scores, also show lower green criteria adoption rates in tenders. This relationship emphasizes the importance of strong drivers - such as financial incentives, regulatory frameworks, and stakeholder pressures - in encouraging public administrations to prioritize green procurement practices.

Suppliers Knowledge and Commitment to GPP

The success of Green Public Procurement not only depends on the internal commitment of public administrations but also on the capacity and dedication of suppliers to meet green criteria. This section examines three critical aspects of suppliers' involvement in GPP: Supplier Knowledge, Relational Behavior, and Suppliers' Commitment to GPP.

- Supplier Knowledge refers to the technical expertise of suppliers in relation to green procurement, including their understanding of sustainability requirements and their ability to leverage the supply chain to achieve environmental objectives. This knowledge is crucial for ensuring that suppliers can meet the technical specifications and standards necessary for sustainable procurement.

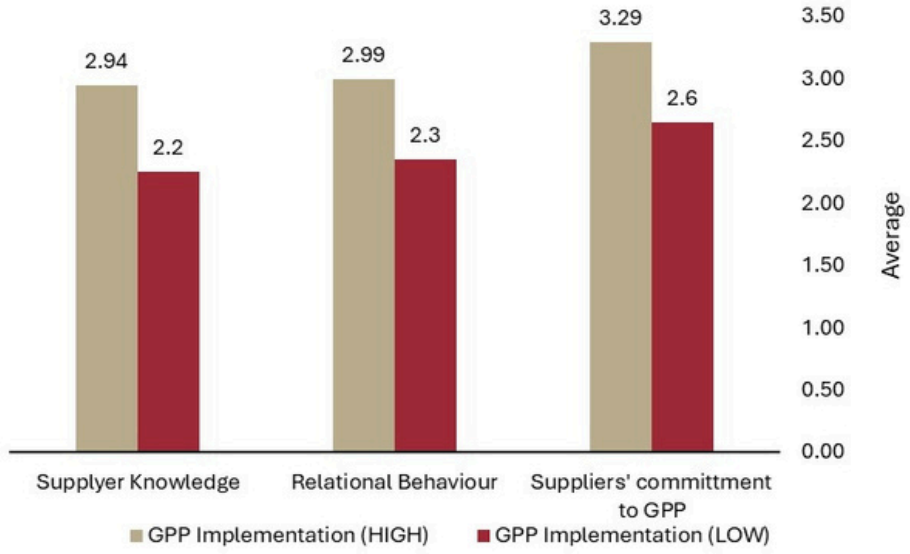
- RelationalBehaviorreflectsthecollaborativerelationshipbetweenthepublicadministrationanditssuppliers.Thisincludes how both parties approach environmental challenges, share responsibilities, and work toward shared sustainability goals. A strong relational behavior emphasizes the importance of partnership, where suppliers demonstrate flexibility, willingness to make adjustments, and commitment to achieving joint environmental outcomes.

- Suppliers'CommitmenttoGPPexplorestheexpectationsandpressuresfromstakeholdersthatinfluencesuppliers'dedication to sustainable procurement. Public stakeholders, citizens, and suppliers alike increasingly expect public administrations to lead by example in adopting green practices. This external pressure drives suppliers to align their practices with GPP goals, reinforcing the legitimacy and necessity of sustainable procurement practices.

By assessing these aspects, we gain insights into the strengths and gaps in suppliers' readiness for GPP, highlighting areas where additional support or collaboration may be needed to meet green procurement objectives.

Suppliers Knowledge and Commitment to GPP





The graphs measure the level of perception by Public Administrations (PAs) regarding suppliers' knowledge, relational behavior, and commitment to GPP, on a scale from 1 to 5, where higher scores indicate stronger perceived alignment with GPP goals.

- Theanalysisrevealsmoderateoverallperceptions byPAsregarding suppliers' knowledge, relational behavior, and commitment to GPP, with average scores across all constructs standing around the mid-point of the scale. These results suggest that while there is some recognition of suppliers' contributions to GPP, significant gaps in perception remain, indicating opportunities for improvement.
- AdeeperexaminationofthebreakdownbetweenPAswithhighGPP implementation (>20% tenders with GPP) versus low GPP implementation highlights significant disparities. PAs with high GPP implementation report consistently higher levels of supplier engagement across all constructs (e.g., Supplier Commitment to GPP: 3.29 vs. 2.6 in low GPP PAs). This suggests that PAs with established GPP practices may have fostered more collaborative and informed supplier relationships.
- PAs with lower GPP implementation report notably lower supplier knowledge (2.2) and relational behavior (2.3). This indicates that suppliers associated with these PAs may lack the technical expertise and collaborative behaviors needed to meet green procurement requirements, potentially hindering broader adoption of GPP.

Organizational Learning and Adaptation

For public administrations to effectively implement Green Public Procurement, fostering a culture of organizational learning is essential. This enables organizations to continuously acquire, refine, and apply knowledge on circular and sustainable practices. Key elements of learning process include:

- ExploratoryLearning:Thisinvolvesactivelyseekingnewknowledgeandinsightsaboutthecirculareconomy.Public administrations may engage in experimentation, collaboration with external experts, and participation in cutting-edge sustainability research. Such exploration allows organizations to stay ahead of regulatory demands and adopt innovative practices that improve sustainability.

- ExperienceAccumulation:BuildingonpastexperiencesisanothercriticalaspectBydrawinglessonsfrompreviousGPP projects, organizations can enhance their understanding. This includes using past project outcomes to inform decisions and incorporating successful practices into future procurement strategies.

- KnowledgeArticulation&Codification:itreferstotheformalizationanddocumentationofknowledge.Throughregular debriefing, detailed reports, and structured guidelines, administrations ensure that valuable information is accessible and consistently applied across departments. Codified knowledge supports the development of internal standards and strengthens the organization's ability to meet GPP objectives efficiently.

- ExploitativeLearning:itfocusesonrefiningexistingpracticesandusingestablishedmethodstoachievesustainabilitygoals. By applying tested solutions and best practices, administrations can make immediate improvements to their GPP processes, emphasizing efficiency and reliability.

Organizational Learning and Adaptation

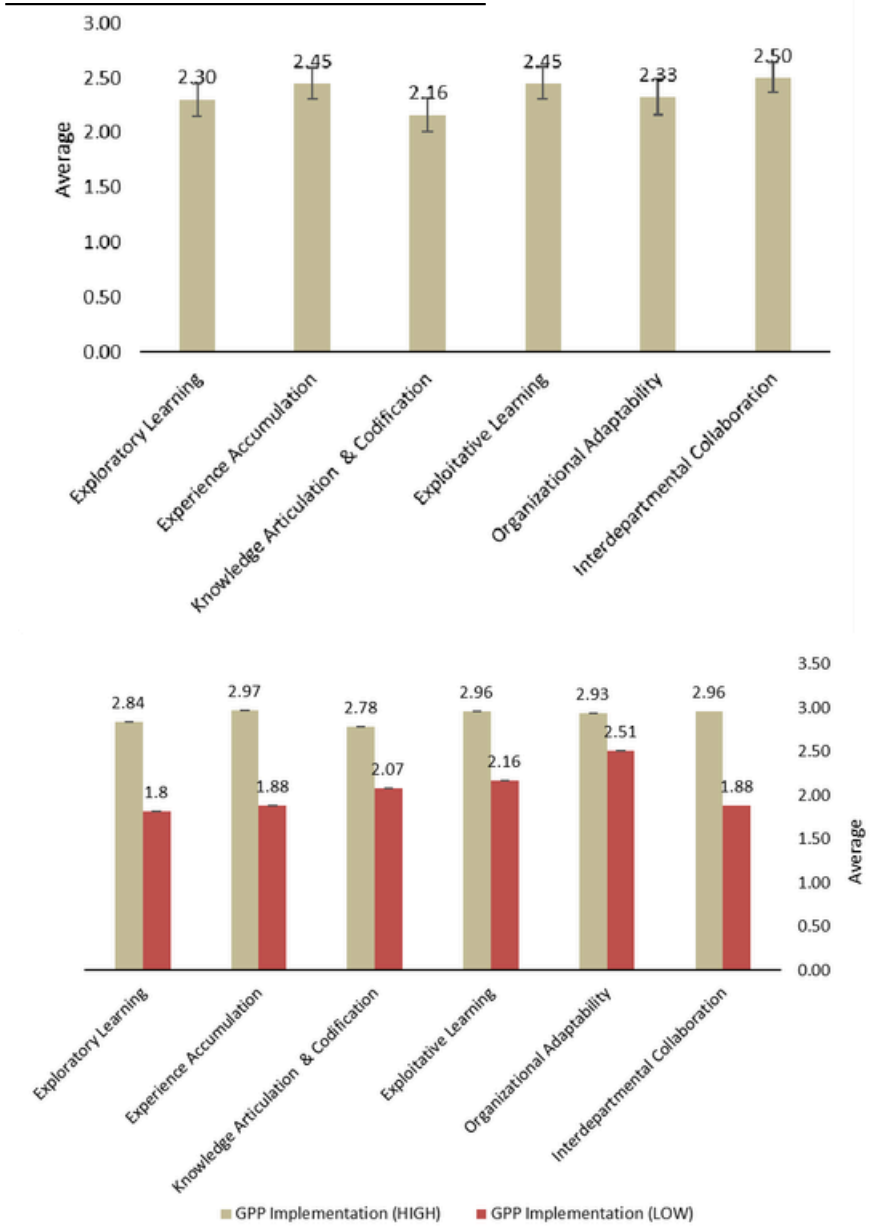
Beyond learning, public administrations must demonstrate organizational adaptability to integrate circular economy principles effectively into GPP. This adaptability involves both internal flexibility and strong collaboration across departments:

- Organizational Adaptability: Adapting to new challenges in sustainable procurement requires changes in the organizational structure. This includes increase the ability to reassess and reallocate resources, adjust strategies, and innovate based on changing environmental demands.

- InterdepartmentalCollaboration:CollaborationacrossdepartmentsiscrucialforthesuccessfulimplementationofGPP. When departments work cohesively to share information, align goals, and coordinate actions, they create a supportive environment for sustainable procurement. Such teamwork ensures that all aspects of procurement, from policy to execution, align with GPP standards.

Together, these elements of adaptability and collaboration enable public administrations to stay resilient and responsive, meeting the demands of green public procurement and supporting broader sustainability objectives.

Organizational Learning and Adaptation



The graphs evaluate the level of organizational learning and adaptability among PAs, focusing on aspects like exploratory learning, experience accumulation, knowledge articulation and codification, exploitative learning, organizational adaptability, and interdepartmental collaboration. Each construct is measured on a scale from 1 to 5, with higher scores indicating stronger engagement in these areas.

- Overall, the results indicate moderate levels across all constructs, with average scores clustering slightly above the mid-point of the scale. Interdepartmental collaboration emerges as the most prominent aspect (2.50), highlighting that teamwork and shared goals are relatively more developed. However, other critical constructs such as exploratory learning (2.30) and exploitative learning (2.33) suggest room for improvement in both acquiring and applying innovative knowledge.
- A closer look at the comparison between high-GPP and low-GPP implementing PAs reveals valuable differences. PAs with high-GPP implementation report significantly higher scores across all dimensions, especially in exploratory learning (2.84 vs. 1.8) and organizational adaptability (2.96 vs. 2.16). These differences highlight that PAs with strong GPP practices not only embrace innovative learning but also demonstrate a greater capacity to adapt their structures to sustainability objectives.
- PAswithlowGPPimplementationlagbehindparticularlyinexperience accumulation (1.88) and interdepartmental collaboration (1.88), pointing to weaker systems for learning from past projects and fostering cohesive teamwork. These findings suggest that enhancing these areas could be key to enabling more widespread GPP adoption among less-engaged PAs.

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Section 2
Circular Economy Demand Discussion



Turning Drivers and Barriers into Opportunities

Public Administrations (PAs) face several challenges when implementing Circular and Green Public Procurement. By adopting a strategic approach, PAs can leverage the opportunities presented by drivers to promote sustainable procurement while minimizing barriers.

- A prime example lies in the financial dimension. Budget constraints, limited financial resources, and the higher cost of green procurement emerge as significant barriers to GPP. Yet, financial incentives and long-term cost savings are equally powerful drivers. By emphasizing the economic benefits of GPP PAs can pose the strategies for sustainable procurement. Advocating for subsidies, grants, or dedicated budgets for GPP can also help alleviate financial constraints.

- Another critical area is organizational knowledge and capacity. Many PAs struggle with a lack of training, insufficient human resources, and limited domain-specific expertise, which limit their ability to implement GPP effectively. However, these organizations often have strong long-term goals tied to sustainability and opportunities to foster collaboration across departments. By aligning GPP initiatives with organizational missions and establishing dedicated training programs, PAs can close these knowledge gaps. Cross-departmental and supplier collaboration can further strength capacity by combining expertise and resources, ensuring that GPP becomes an integral part of the organization's operations.

- Regulatory gaps, such as unclear guidelines and ambiguous legal frameworks, also present a dual challenge and opportunity. While these barriers create uncertainty, political and legislative pressure can drive change by setting clear sustainability goals and enforcing policies. PAs can play an active role by advocating for streamlined, actionable GPP policies while developing internal guides to clarify ambiguous regulations. Collaboration with policymakers ensures that procurement practices are aligned with broader legislative objectives, creating a supportive environment for sustainable procurement.

Turning Drivers and Barriers into Opportunities

- Market availability is another area where challenges and opportunities intersect. Limited access to green products and services constrains procurement options, yet rising stakeholder expectations—from citizens, NGOs, and employees—create a strong demand for sustainable practices. By engaging with suppliers to encourage innovation and creating platforms to showcase green products, PAs can stimulate market development.

- Finally, internal conflicts between departments, while less significant than other barriers, still represent a challenge. These challenges can be addressed by fostering a culture of collaboration and shared goals. Clear communication channels, interdepartmental workshops, and long-term partnerships with suppliers can align objectives and create a unified approach to GPP implementation.

What can PAs do to improve supplier's knowledge and commitment?

The strong relation between supplier engagement and the success of GPP underscores the importance of targeted interventions to enhance supplier readiness and drive greater GPP integration. Considering the aspects measured for the knowledge and commitment of suppliers, PAs can adopt several strategies targeting their supplier to enhance the readiness to respond to the circular and green demand.

- Supplier'sKnowledge:Organizeworkshopsandtrainingsessionstoenhancesuppliers'knowledgeofGPPcriteria,the technical aspects of circular economy implementation in their processes and products. For example, sharing real-case scenario and examples of successful green tenders could be helpful to demonstrate tangible benefits and implementation pathways.

- CollaborativeRelationships:PAscouldestablishforumsorregularmeetingsforcollaborativedialoguebetweenPAsand suppliers, as well as with third party, to address circular challenges and foster a shared responsibility for common goals. In doing so, PAs could boost long-term partnerships that incentivize innovation and joint circular improvements.

- Suppliers' Transition: Provide stimuli on leveraging the supply chain to achieve GPP goals, such as connecting suppliers to green certification schemes or renewable energy providers. PAs could offer technical assistance and tools, such as checklists or templates, to help suppliers align with green and circular criteria.

- Suppliercommitment:PAscoulduseprocurementasatooltostimulatemarketdemandforgreenproductsandservices, encouraging suppliers to integrate circular economy principles. For example, they could recognize and reward suppliers who demonstrate commitment to circular practices.

Leveraging Organizational Learning for C/GPP

PAs can significantly enhance their ability to integrate green and circular criteria into tenders by investing in strategies that promote organizational learning.

- Exploratory learning: By seeking innovative solutions and engaging in collaboration with policymaker and external experts, PAs can stay ahead of regulatory demands. For instance, running pilot projects or attending workshops and conferences enables PAs to test cutting-edge practices such as resource efficiency and circular product design. These efforts not only improve organizational knowledge but also create opportunities to adopt transformative practices.

- Accumulating experience: PAs should systematically document lessons from previous procurement projects to build institutional memory. This involves analyzing successful tenders, identifying best practices, and incorporating them into future procurement strategies. Annual supplier audits and environmental performance reviews are practical methods to ensure alignment with these insights. When past experiences are used to refine procurement strategies, the organization becomes more capable of consistently meeting sustainability objectives.

- Knowledge articulation and codification: By formalizing knowledge through manuals, checklists, and structured guidelines, PAs can ensure that valuable insights are not only preserved but also accessible across departments. Regular debriefings and centralized digital platforms to track procurement metrics can further strengthen this approach, ensuring that the organization is equipped with the tools and data needed to make informed decisions consistently.

Leveraging Organizational Adaptation for C/GPP

To increase the demands of green public procurement, PAs should not only learn but also adapt to the dynamic context:

- Organizational adaptability involves creating structures that enable flexibility in response to changing sustainability challenges. This includes reallocating budgets and human resources to prioritize green procurement initiatives and fostering an innovation-driven mindset within the organization. By embedding sustainability goals into their core mission, PAs can create a resilient culture capable of meeting the dynamic demands of circular economy practices.
- Another critical strategy is to leverage exploitative learning, which focuses on refining and optimizing existing processes. This involves applying established best practices, such as prioritizing suppliers with eco-certifications or integrating energy-efficient solutions into tenders. Continuous assessment of current procurement procedures allows PAs to identify inefficiencies and refine their practices, ensuring a higher level of sustainability. Engaging stakeholders through feedback exercises further enhances this process, as it provides valuable insights into areas needing improvement.

- Sustainability goals cannot be achieved in isolation; they require cohesive efforts across all departments of the PAs. Effective collaboration ensures that information flows seamlessly and that all teams are aligned in their objectives. Cross-functional teams, tasked with coordinating green procurement efforts, can drive this alignment. By integrating sustainability objectives into every level of departmental operations, PAs create a unified approach to green procurement that is both efficient and i mpactful.

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Section 3
Conclusion



Investigating Circular Transition through C/GPP: A Dual Perspective on demand and supply

The Initial Assessment was designed to evaluate the state of circular economy integration across two key areas: circular supply practices within enterprises and the incorporation of green criteria in public procurement processes. This dual perspective aimed to uncover the main drivers and barriers that influence these efforts, alongside organizational enablers and strategies that support the transition to circularity.

- Forenterprises,thesurveyfocusedonassessingtheircirculareconomyperformance,identifyingchallenges and opportunities, and exploring how they adapt and learn to meet public procurement requirements and the most effective organizational strategies.

- TheanalysisofPublicAdministrationsaimedtounderstandtheirapproachtoGPPintegration,thebarriers they face, and their perceptions of supplier commitment to green procurement, as well as the learning and adaptation drivers.

The study was built on a robust methodology, combining insights from academic and grey literature. The survey, translated into seven languages, was disseminated across seven Central European countries: Italy, Poland, Austria, Croatia, Slovenia, Hungary and Germany. Thanks to the collaborative efforts of the CE-Prince project partners, a total of 398 enterprise responses and 232 from public administrations were collected, providing a comprehensive overview of circular economy in demand and supply.

Insights into Enterprises and Circular Economy Implementation

The enterprise survey revealed a mixed picture of circular economy adoption. While certain lifecycle phases, such as waste management, showed higher implementation levels, other phases, like logistics and the use and end-of-life information of products, remained underdeveloped. This highlights significant opportunities for improvement, particularly in areas where customer engagement and lifecycle management are crucial.

Enterprises face a range of barriers, from administrative burdens and financial constraints to regulatory challenges. However, the survey also identified important drivers, including economic benefits, procedural clarity, and early interaction with public buyers. Interestingly, sustainability and innovation-related drivers, despite their long-term importance, were less emphasized, pointing to potential areas for policy enhancement.

Organizational strategies played a pivotal role in addressing these challenges. Enterprises with strong market orientation, effective coordination mechanisms, and robust learning capabilities were better positioned to align with GPP requirements and integrate circular practices systematically.

Public Administration Insights into GPP Integration

The survey highlighted considerable variability in how PAs integrate GPP criteria across different product categories. While certain sectors showed higher adoption rates, there remains a lack of consistent emphasis on green and circular innovations in procurement practices.

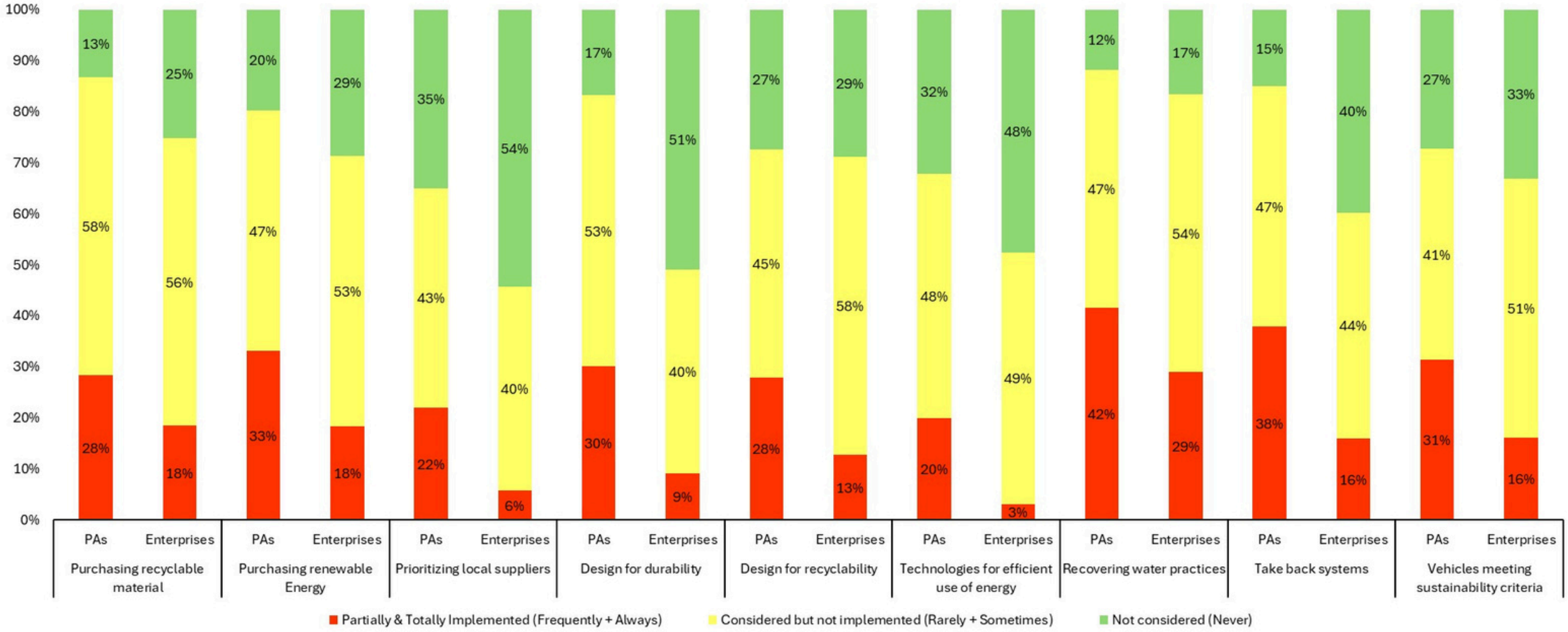
Barriers such as unclear procedures, risk aversion, and administrative inefficiencies continue to hinder the adoption of GPP. However, drivers like economic benefits, clear documentation, and early interaction with suppliers provide significant opportunities for improvement.

The findings also shed light on the mixed perceptions PAs hold about supplier commitment to GPP. While some suppliers are seen as proactive, others are perceived as needing greater awareness and engagement. This points to the need for stronger collaboration and capacity-building initiatives.

PAs themselves recognize the importance of internal learning and adaptation strategies to improve GPP implementation. By enhancing their capacity for external information acquisition and internal knowledge diffusion, and feedback mechanisms loop with suppliers, PAs can accelerate the integration of circular economy principles into public procurement and better stimulate the private sector toward circular transition.

Comparison Circular Demand vs. Circular Supply

The following graph presents a comparison between enterprises and public administrations based on parallel survey questions aimed at mapping the integration of circular economy practices in supply and demand. For enterprises, the implementation of circular practices was measured by their degree of adoption, while for public administrations, the integration of circularity criteria in public tenders was assessed by their frequency of application (as indicated in the parentheses in the graph).



Comparison Circular Demand vs. Circular Supply

The comparison between the adoption of circular criteria in Pas' tenders and circular economy strategies in Enterprises highlights significant gaps in the implementation of circular practices, particularly in areas such as purchasing renewable energy, recovering water practices, and take-back systems.

- While enterprises show a higher level of implementation in these areas (e.g., 29% of enterprises for renewable energy vs. 20% of PAs; 40% of enterprises for take-back systems vs. 15% of PAs), public administrations lag behind in integrating these criteria into tenders. This gap underscores the need for PAs to strengthen procurement requirements and incentives for circular practices.
Conversely, prioritizing local suppliers demonstrates strong alignment between PAs and enterprises, with
- enterprises showing even higher implementation (54%) compared to PAs (35%). This alignment suggests that fostering local supply chains is a shared priority, but PAs could further leverage this practice by promoting local partnerships through targeted incentives.

- A notable concern is the low implementation of recovering water practices and design for recyclability across both sectors, suggesting a broader systemic issue rather than a specific perspective on the demand or supply side. As discussed in the previous chapters, strategies to address these gap include knowledge-sharing initiatives and co-development of water recovery and recycling systems between public buyers and suppliers.

Comparison Circular Demand vs. Circular Supply

- While some alignment exists in areas like technologies for efficient energy use (48% of enterprises vs. 32% of PAs for partial or total implementation), the gap reflects a missed opportunity for PAs to adopt enterprise-driven innovations in procurement processes. Public Administrations could capitalize on private sector advancements by designing tenders that reward energy efficiency technologies and encouraging innovation-friendly collaborations.
- Design for durability demonstrates a relatively high implementation rate in enterprises (51%), yet PAs fall behind with only 17% partial or total integration. This highlights the need for PAs to incorporate durability requirements into contracts, ensuring public demand promotes long-lasting, repairable products aligned with enterprise capabilities.

- The aggregated averages for circularity practices reveal a significant gap between PAs and Enterprises in terms of implementation. While Enterprises show higher alignment with circularity practices (36% partially or totally implemented) compared to PAs (22%), a notable proportion of PAs (30%) have not considered these practices at all, almost double the percentage of Enterprises (14%). This indicates that while circularity is more embedded in Enterprises' operations, PAs still lag in integrating circularity criteria into their procurement processes. The similarity in the "considered but not implemented" category (50% for Enterprises, 48% for PAs) suggests shared challenges, such as lack of resources and operational readiness to fully implement circular practices.

Comparison Circular Demand vs. Circular Supply

- Although countries have developed GPP criteria, there are significant disparities in the adoption of environmental criteria. Inconsistency is particularly evident regarding mandatory GPP criteria within the Partner Countries compared to existing policies, which may be due to:

  - o Lack ofknowledge from publicadministrations.
  - o The fragmentation caused by variations in the product and service categories prioritized and covered bymandatory compliance in each Country.
  - o Most responses were provided by public administrations operating at the local and municipal levels, and the procurement policies in some countries impose varying levels of compliance for sub-national entities (e.g., Austria, Germany).

  The observed divergences highlight the need for greater harmonization and standardization of GPP approaches and standards to make its adoption more homogeneous and consistent across the EU countries.

- Italy's CAM integration into public procurement processes: despite the mandatory requirement of CAM integration into public tenders, the data show that all product and service categories face a certain share of low integration, with some categories facing a significant share of "never" responses(see Annex II), hence suggesting that these areas encounter systemic or practical barriers to adopting CAM, and a need for targeted strategies to overcome sector-specific challenges.

Barriers as Challenges for Circular Transition

Overcoming present barriers represent opportunities for circular transition in both the public and private sector.

- For enterprises, recognizing challenges such as administrative burdens or low financial returns can drive internal innovation. For example, companies can streamline processes, invest in digital tools, and build strategic partnerships to overcome these hurdles. Similarly, addressing financial constraints through innovative funding mechanisms can help enterprises better align with circular procurement demands.

- Public Administrations have a crucial role in transforming barriers into enablers. Improving the clarity of tender documents, offering meaningful feedback, and creating flexible procurement frameworks can empower companies, particularly SMEs, to participate more effectively. Programs that address risk aversion and promote collaboration between suppliers and PAs are particularly vital for fostering a dynamic procurement landscape that supports circular economy goals.

Collaboration between companies and public administration is key. Joint workshops, continuous dialogues, and shared capacity-building efforts can ensure that both sides are better equipped to overcome barriers and achieve circularity.

Drivers as Enablers of Circular Economy

Emphasizing present Drivers is a key strategy to boost circular transition in both the public and private sectors. Drivers such as economic benefits, early collaboration, and procedural clarity are essential to fostering participation in GPP. Enterprises that proactively rely on these drivers can strengthen their competitive advantage, aligning their operations with circular economy principles. However, the relatively lower focus on sustainability and innovation drivers underscores a critical gap. Addressing this gap provides an opportunity for both enterprises and public administrations to amplify the role of these elements as catalysts for a systemic shift toward circularity.

Public Administrations can play a transformative role by embedding lifecycle costing, sustainability incentives, and innovation-friendly criteria into procurement processes. Establishing trust through early collaboration, competitive dialogues, and transparent communication channels enables enterprises to align their offerings with public sector demands. These efforts create a supportive framework, encouraging broader adoption of circular practices and fostering a symbiotic relationship between public procurement and the private sector.

Suppliers' perception of Public Buyers' Innovativeness

The findings highlight a crucial aspect of how companies perceive public buyers in terms of innovativeness.

Generally, public buyers are viewed as less innovative compared to their private counterparts, with companies participating in Green Public Procurement (GPP) processes expressing similar sentiments to those that do not participate. This perception reveals systemic challenges within public procurement environments where risk aversion and limited openness to experimentation persist.

Interestingly, companies that have not participated in GPP tend to perceive public buyers as slightly more innovative than those with experience in these processes. This counterintuitive result could stem from higher expectations among participating companies who directly encounter the rigidity or lack of proactive engagement by public buyers. Non-participants, on the other hand, may evaluate public buyers from an external perspective, influenced by idealized assumptions rather than operational realities.
To address these perceptions, public buyers must proactively demonstrate their commitment to innovation. This includes introducing more flexible tender requirements, emphasizing innovation in procurement criteria, and fostering an open environment where suppliers feel encouraged to propose novel solutions.

The role of public administration in enhancing suppliers' commitment to GPP

Public Administrations play a crucial role in enhancing supplier knowledge and fostering greater commitment to Green Public Procurement. Survey results indicate that while PAs recognize the importance of supplier engagement, gaps persist in effectively communicating circular requirements and expectations.

- To bridge these gaps, PAs can initiate targeted workshops and training programs designed to enhance supplier understanding of technical aspects and circular criteria. Sharing real-world case studies and successful tender examples can demonstrate tangible benefits and provide actionable insights for suppliers.

- PAs can support suppliers in transitioning towards greener practices by providing clear guidance on certification schemes, renewable energy integration, and sustainable production methods. This includes offering practical tools, such as checklists and templates, to streamline compliance with green criteria.

- Procurement practices can serve as levers for promoting supplier commitment. By rewarding sustainable and innovative solutions through tender evaluation criteria, PAs incentivize suppliers to invest in circular strategies. These efforts create a virtuous cycle where increased supplier commitment leads to more sustainable outcomes in public procurement.

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Section 4

Additional observations



Additional observations

This study offers a comprehensive evaluation of circularity in public and private sectors, providing an initial benchmark for understanding trends, barriers, and drivers in the transition to a circular economy. Based on 398 responses from enterprises and 232 from public administrations across seven countries, the findings highlight the current state of circular procurement and supply practices within the project's countries.

The survey design ensured a rigorous approach, including translations into seven languages, carefully formulated questions, and anonymity to encourage truthful responses. To address potential biases, reverse-coded scales were used, and dissemination materials emphasized the need for knowledgeable respondents. While robust, the study acknowledges few limitations. The sample size may not fully represent the diversity of

practices across all regions, sectors and organizational types, thus affecting representativeness and inter-country comparison. Also, limited understanding of green procurement concepts in certain regions and varying levels of awareness about circular economy practices may have further restricted broader participation, especially among enterprises. Furthermore, self-reported data may introduce biases, such as over-estimating circular practices or underreporting barriers. Finally, differences in cultural interpretations and internal communication structures further influence response consistency.

Additional observations

While quantitative analysis derived from this study provides valuable insights, it may obscure contextual and country-specific nuances that qualitative methods are better suited to uncover. To complement this approach, qualitative assessments in the form of semi-structured interviews are underway: five enterprises and five public administrations per country are being interviewed with the aim to capture deeper insights into circularity, such as organizational culture, informal practices, and contextual challenges. The interviews address nuances that quantitative methods may overlook, ensuring a more holistic understanding of circular economy integration. The extent to which respondents are informed and knowledgeable—regardless of their number compared to the overall sample size—is what makes interviews both insightful and a valuable complement to surveys.

To conclude, despite some methodological limitations, the study provides valuable insights into the circularity landscape. By combining quantitative and qualitative approaches, it lays a strong foundation for future research and practical strategies to advance circular procurement and supply practices.

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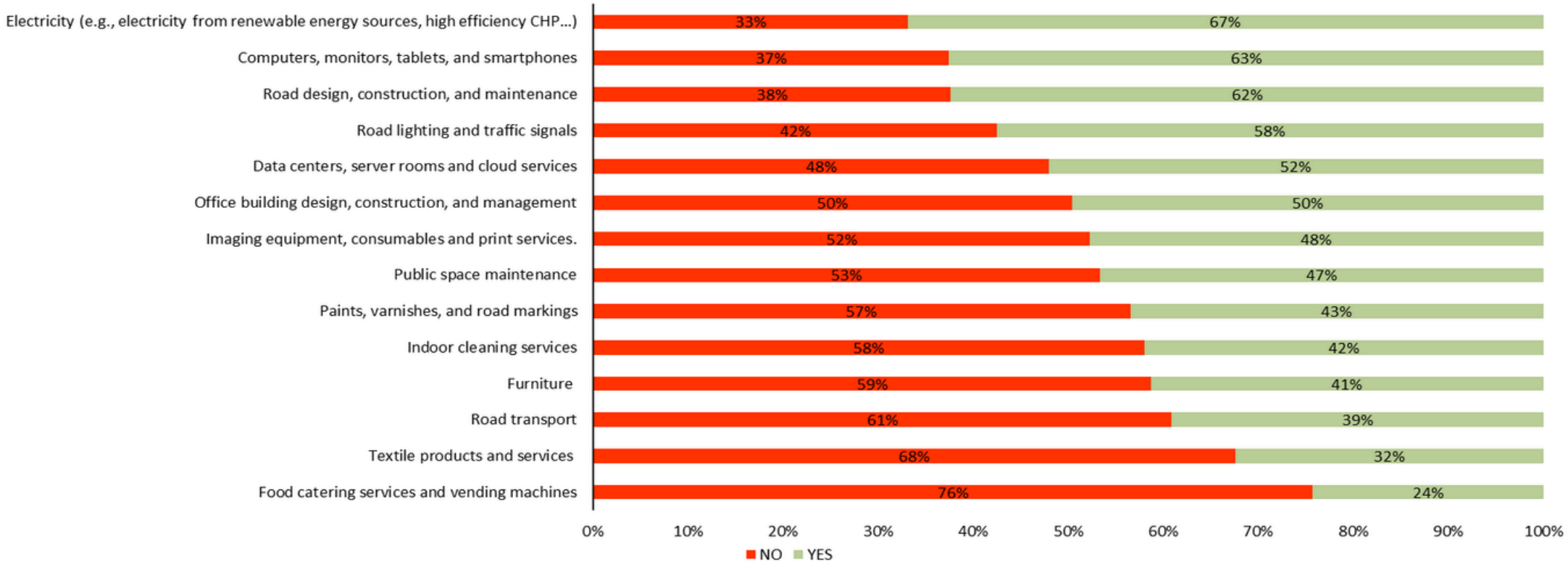
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Annex I
Circular Economy Demand



EU GPP Criteria Integration in Public Tenders in next 2 years

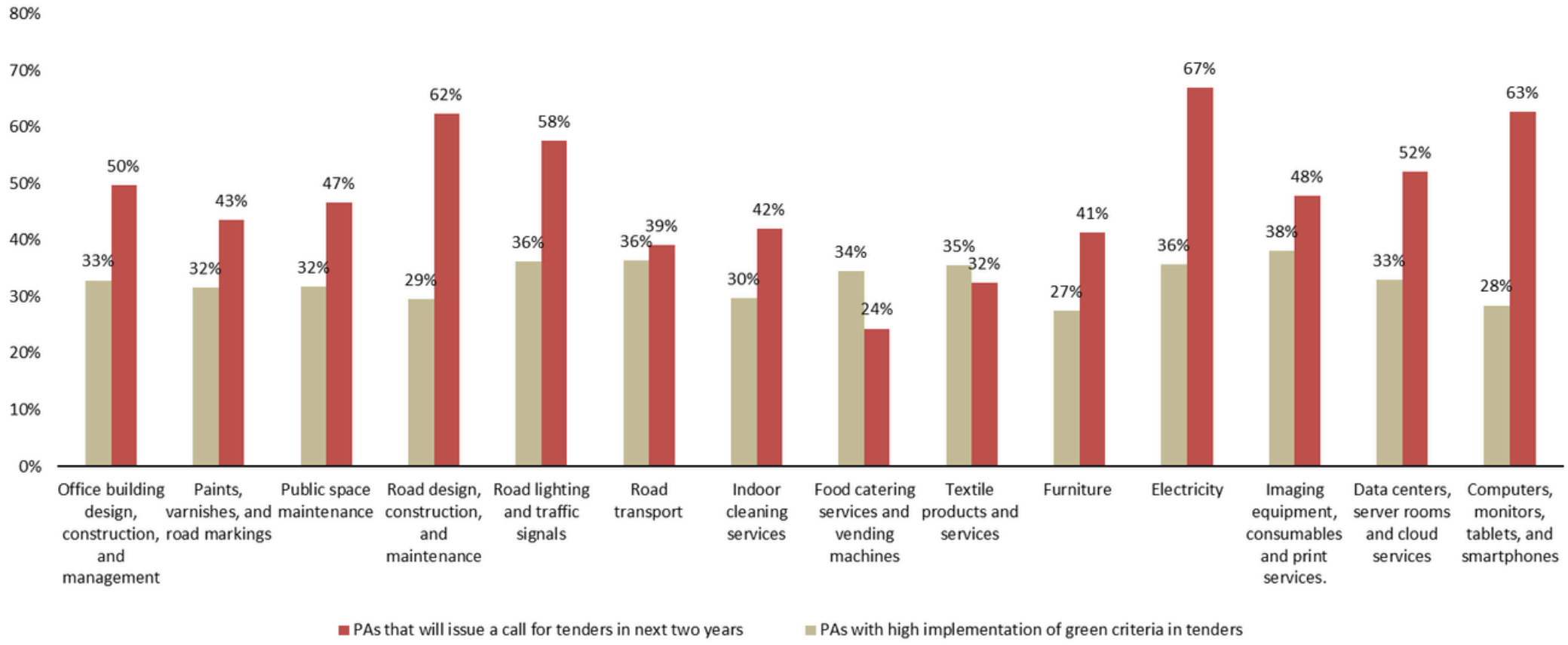
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The highest adoption of Green criteria in public tenders in the next two years is expected for categories such as electricity (67%), computers, monitors, tablets, and smartphones (63%), and road design, construction, and maintenance (62%), reflecting a strong focus on energy efficiency and technology-related sectors.

Conversely, the lowest adoption rates are projected for food catering services and vending machines (24%), textile products and services (32%), and road transport (39%), suggesting challenges in incorporating green criteria in these areas.

Future Opportunities for Green Criteria Integration in Public Tenders



This graph compares the percentage of PAs that have a high integration of green criteria in public tenders with the percentage of PAs that will issue public tenders for various product categories in the next two years. It provides a clear picture of the future opportunities for integrating green criteria into tenders and highlights areas for improvement.

Current vs. Future Integration of GPP criteria in tenders

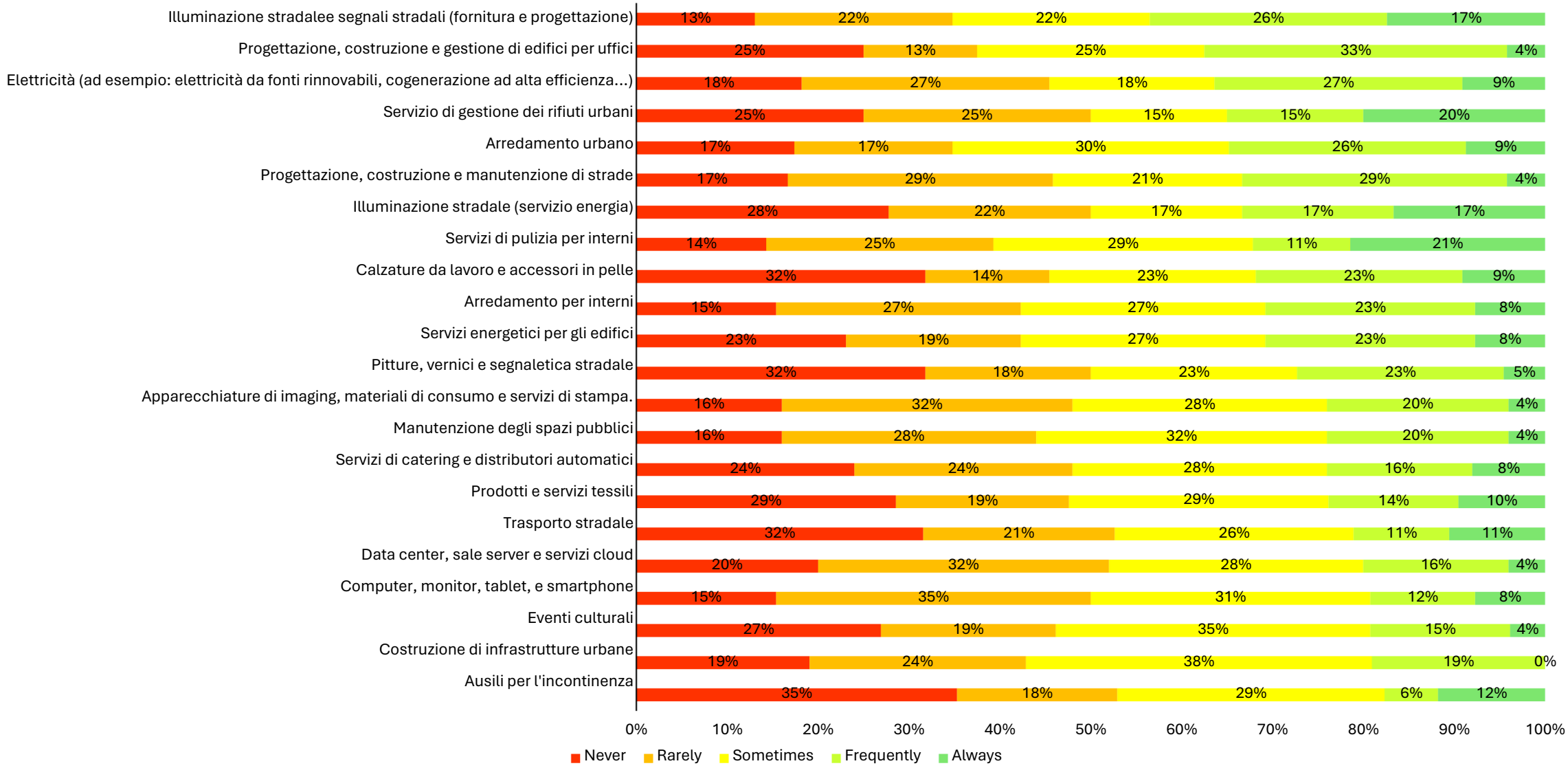
The previous graph provides an insightful comparison between the percentage of PAs with high integration of green criteria in tenders and the percentage of PAs planning to issue tenders across various product categories in the next two years. The results highlight both opportunities for expanding green criteria implementation and areas requiring improvement.

The highest integration of green criteria is observed in product categories such as electricity (36%) and office building design, construction, and management (33%) and both Road transportation and Road lighting (36%), yet these are by the much higher percentage of PAs planning tenders in these areas, such as 67% for electricity and 50% for office buildings. This gap suggests a significant opportunity to enhance the integration of green criteria in upcoming tenders.

Notably, computers, monitors, tablets, and smartphones have one of the lowest percentages of green criteria integration (28%) despite high tender activity (63%). Similarly, categories such as furniture (27% integration vs. 41% tenders) and road transport (36% integration vs. 39% tenders) demonstrate a need for further alignment between green criteria and procurement priorities.

These findings underline the need for targeted actions by PAs to close the gap between tender activity and green criteria implementation, fostering a more consistent approach across categories. Promoting green integration in high-volume categories, like data centers and IT equipment, is critical for driving circular economy objectives in procurement.

CriteriAmbientaliMinimi(Italy Only)



CriteriAmbientaliMinimi(Italy Only)

The previous graph provides an overview of how Public Administrations currently integrate Environmental Minimum Criteria (CAM) into their procurement processes across diverse product and service categories. Following, some highlights on the main trends:

- High Integration (Frequently + Always): Road lighting and traffic signals and office building design, construction, and management stand with 43% and 37%, respectively, in the “Frequently” and “Always” ranges, indicating high integration of CAM for these categories. Electricity procurement achieves particularly high integration, with 27% in "Frequently" and 9% in "Always", reflecting strong adoption likely driven by established energy efficiency policies.

- ModerateIntegration(Rarely+Sometimes):Officebuildingdesign,construction,andmanagementshows33%in"Sometimes", complemented by 13% in "Rarely“, indicating a moderate integration. Similarly, road lighting and traffic signals has a combined moderate response rate of 50%. Cultural events (27% Rarely + 19% Sometimes) and furniture (15% Rarely + 27% Sometimes) highlight areas where integration is progressing but not yet mainstream.

- LowIntegration(Never):Aidsforincontinencehasthelowestintegrationlevels,with35%ofPAsreportingthey"Never" incorporate EMCs, followed by textile products and services (29%), and road transport (32%). Other categories with significant "Never" responses include Work footwear and leather accessories (32%) and Paints, varnishes, and road markings (32%), suggesting these areas face systemic or practical barriers to adopting CAM.
  Infrastructure-related categories such as road design, construction, and maintenance and waste management services show
- relatively balanced distributions, indicating incremental progress but room for greater adoption. Procurement related to aids for incontinence and cultural events demonstrates a significant gap in high-level integration, suggesting a need for targeted strategies to overcome sector-specific challenges.