



FOCUS GROUP REPORT

Deliverable 16



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Introduction

The primary objective of EcoSMEnergy is to enhance energy efficiency and sustainability of small and medium size enterprises (SMEs) in the targeted sectors. To reach this objective, the project pursues a series of activities, including different trainings and workshops.

For the training to be as close to the needs of the targeted SMEs as possible, the project partners started with a comprehensive scoping study to assess the current state of energy consumption and energy awareness levels among SMEs operating in NACE code sectors C20 to C22 and C25 to C29.

The scoping study was complemented with the conduction of focus group discussions with SME representatives of the targeted sectors. The purpose was to gain valuable insights into the specific requirements, preferences, and challenges related to implementing energy efficiency measures. The information gathered during these discussions is to inform the development of tailored training content, ensuring alignment with SMEs expectations and needs.

To ensure a comparable set of responses across the participating countries, a common questionnaire was elaborated to guide the focus group discussions and provide a framework for responses. The focus group questions were divided into five themes, the first four following the logic of the Voluntary Code of Conduct (VCC) and the last one covering practical preferences relating to the format of the training. The five themes were:

1. Establish Energy Policies – SMEs were asked what measures they are planning to take or already have implemented to improve energy efficiency;
2. Set Energy Targets – SMEs were asked whether they have defined energy efficiency targets and if so, how these are tracked;
3. Implementing Action Plans was about how companies track the implementation of energy efficiency measures and their effectiveness;
4. Monitoring and Improving Energy Efficiency – SMEs were asked how they oversee the implementation and improvement of energy efficiency;
5. Training Format Preferences - participants were asked to share their preferences on the most convenient format of energy efficiency training, as well as practical information relevant for the organization of trainings.

The present report is the summary of the Focus Groups discussions outcome and provides an overview of the qualitative findings of the focus group discussions that were conducted within the framework of Work Package 4 (WP4).

Overall, the chambers of commerce and industry partners organized focus group discussions in six partner countries (Estonia, Cyprus, France, Latvia, Malta and Spain) with 27 SME representatives between 9 and 29 July 2025.

1. Establish Energy Policies

1.1. Have you already identified any simple steps or initial measures you could take to reduce energy use? If so, what were they, and what challenges did you face in identifying them?

All responding companies confirm that they have implemented or are planning to implement measures to contribute to the reduction of energy consumption. Among the most common measures implemented is the increase of efficiency in lighting: companies from Latvia and Estonia confirm that they have already switched to LED lighting, set-up sensors.

Other measures that have been implemented depend on the geographical situation of the responding companies, size, operations, and ownership of the premises. For instance, companies located in Southern Europe (Malta, Spain, France, Cyprus) stated that they are planning or already have invested in solar panels, while companies in Northern Europe (Latvia and Estonia) invest in insulation of the buildings due to the low temperatures during the winter. However, geographics is not a clear-cut, as companies in Estonia also confirm that there are plans to develop solar panel systems with available EU funding to support the investment. Furthermore, with increasing fluctuations of temperature (extreme heat in summer and/or cold winters) companies in the South and in the North of Europe mention that efforts for achieving stable and comfortable temperatures in the offices and manufacturing sites is an energy objective (respondents from Estonia and France). While talking about challenges that companies are facing, several businesses emphasized lack of financial resources for improving energy consumption (Cyprus), as well as bureaucratic obstacles that burden the implementation of further energy efficiency improvements (A respondent from Estonia noted that obtaining a renovation permit from the municipality is the biggest challenge).

1.2. What kind of commitment would be needed for tackling energy efficiency questions?

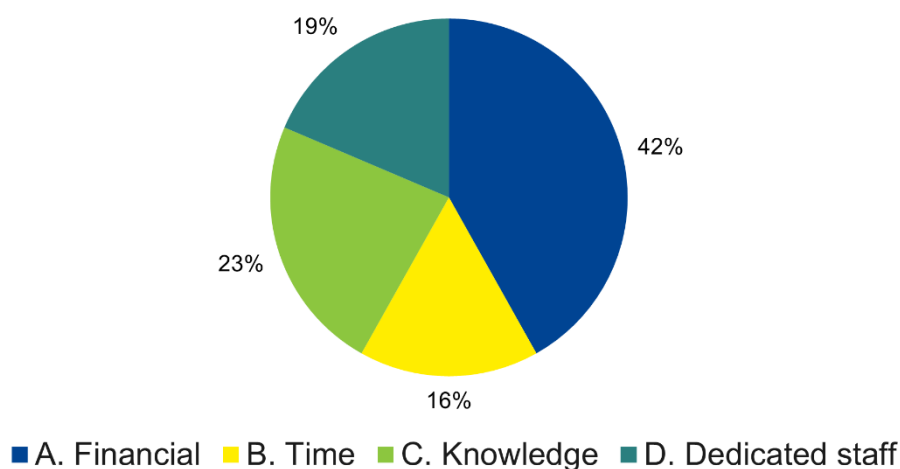
Most of the responding companies stated that either a statement from leadership is sufficient to tackle energy efficiency questions or that formal energy policies are needed. This depends on the size of the company and type of organization. Several respondents, however, confirmed that no formal commitment is needed for tackling energy efficiency questions and respondents from France specified that policies are imperative to move towards energy efficiency, but actions need to be prioritised over formalities. A respondent from Latvia provided a value chain perspective: the commitment to tackle energy efficiency and pursue sustainability as a wider objective also in part originates from clients' expectations and requirements, as the company exports its product to Scandinavia where high sustainability standards are in place.

1.3. Are responsibilities for energy management currently assigned within your company? If yes, how?

Only a few companies have a specific position of energy manager that is responsible for energy efficiency-related questions. A respondent from Latvia explained they have a large, energy-intensive manufacturing site and therefore there is an energy management department headed by a chief energy engineer and a team. A respondent from Cyprus shared that energy management is dealt with by the Environmental (HSE) department with scientific and engineering personnel running ISO 14001, ISO 50001, and sustainability monitoring and reporting, as well as a Technical/Engineering department with mechanical, electrical, and sustainable energy engineers. Most companies have assigned the responsibilities of energy management to an employee covering different roles such as the technical director or the CEO, or the owner in smaller companies. Some outsource energy management entirely. There are also businesses that stated that there is no one responsible for energy efficiency policy implementation.

1.4. What kind of resources do you feel are needed to start addressing energy efficiency? What are the biggest resource constraints?

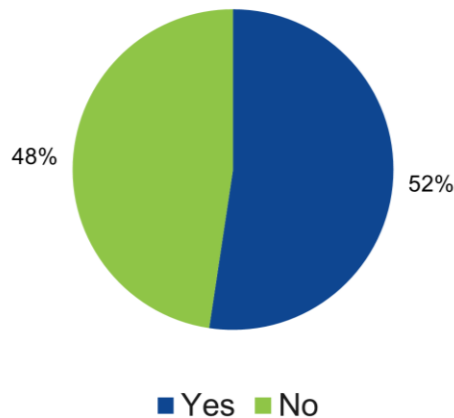
What kind of resources do you feel are needed to start addressing energy efficiency?



The most common answer to this question was that financial resources are the most important to address energy efficiency improvement measures. Measures that are not cost-intensive, for example, related to lighting, are easy to implement. However, in case of important investments such as acquiring battery banks and electric forklifts, developing solar panel systems or insulating buildings (representatives in France and Estonia both stated that the long-term clarity about government support for energy efficiency is needed) there needs to be a return on investment in order to go for them. No clear tendencies emerge for the other types of resources. For instance, some state that knowledge is easily accessible (Latvia), while other respondents do consider that there is a lack of knowledge, for instance, that it is difficult to find specialized personnel dedicated to energy efficiency questions (Cyprus).

1.5. Do you feel your staff have the necessary knowledge or training (competence, awareness) regarding energy efficiency?

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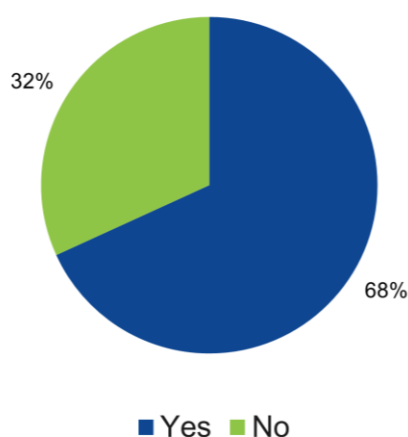


Roughly half of the respondents answered that employees need training in energy efficiency, and the other half believes that the current level of employee knowledge on energy efficiency is sufficient and satisfactory . Some respondents focused on changing employee habits and providing basic energy efficiency training such as asking all employees not to leave the door open, running appliances only when needed, while some said that knowledge and training is needed only for expert level or engineers that are directly involved in energy-related matters (Cyprus).

2. Set Energy Targets

2.1. Do you have energy performance targets in place?

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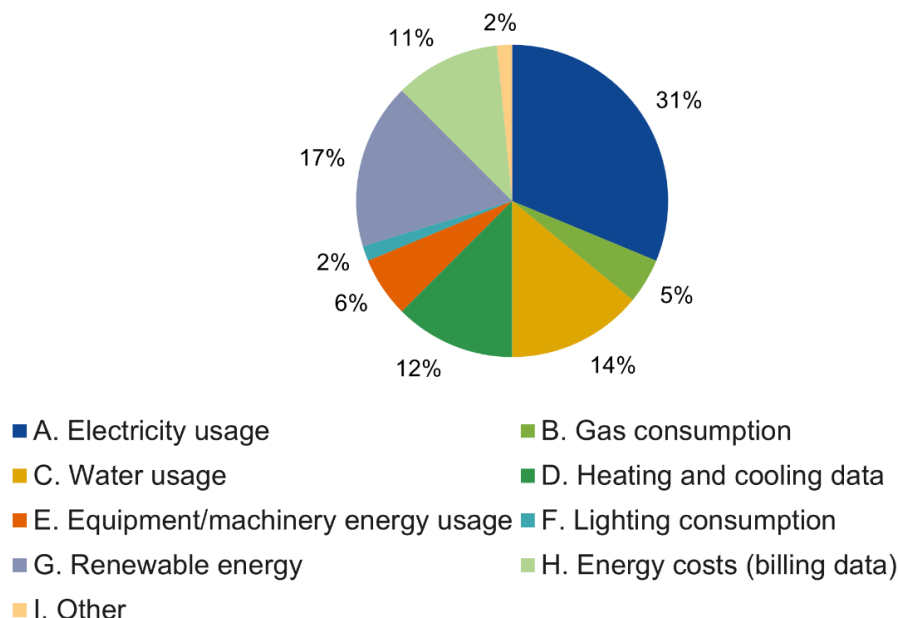
Respondent answers vary, some do not have written targets in place, some have broad targets such as “reduce energy costs” or “improve energy efficiency”, and others have targets that relate to certification. In fact, respondents from Cyprus and Latvia explicitly mention following ISO 50001 standards, respondents from France and Spain mention non-specific certification.

2.2. If you currently collect data on your energy consumption, what types of energy data do you gather?

All companies track their energy consumption and most of them collect data on electricity usage, gas consumption, water usage, heating and cooling data and usage of renewable energy. A respondent from Estonia specified that before installing solar panels, the company did not carefully monitor their energy consumption. However, the installation of solar panel systems has been a source of motivation and furthermore with the undertaking of ESG reporting the company also feels a greater responsibility to track and document our energy data more systematically.

The share of the different types of energy data gathered is illustrated in the after mentioned graph.

If you currently collect data on your energy consumption, what types of energy data do you gather?



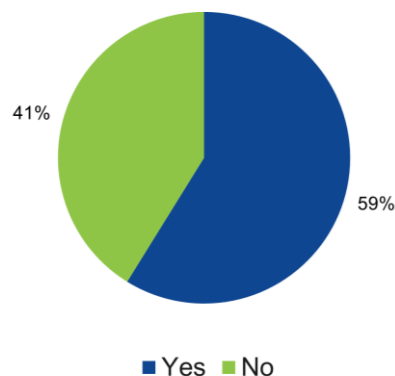
2.3. What tools or methods do you use to analyze this energy data? Is it easy to understand your energy usage patterns?

The monitoring methods vary from respondent to respondent from “manual methods” that include man-made calculations and identification of energy-intensive machinery or following prices on bills (Latvia, France, Estonia), to automated energy monitoring (Malta, Spain, Cyprus). Some companies state that they do not use any tools or methods to analyse energy data.

2.4. Do you track your energy performance over time against a baseline?

Some of the companies measure their energy performance and against historical data of energy (Malta). Other companies that have set energy targets and do track energy performance do not indicate a baseline (France, Cyprus).

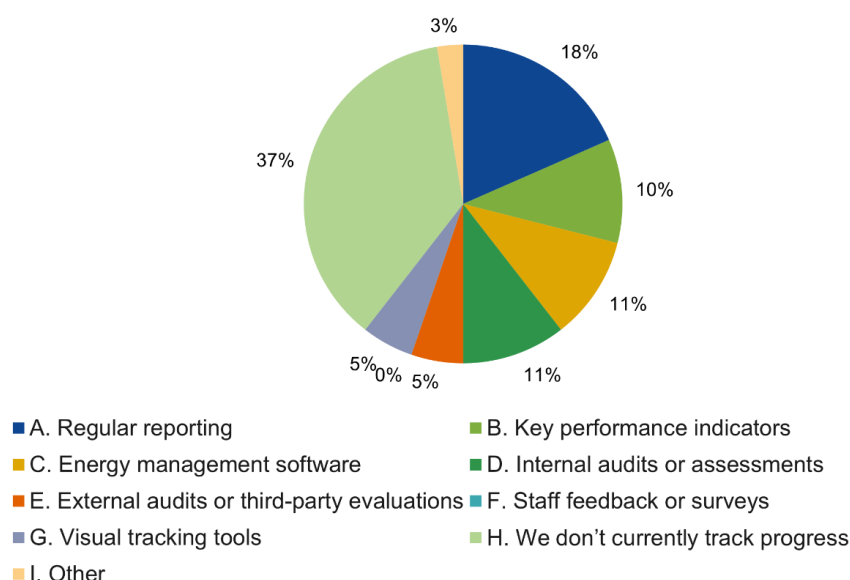
Do you track your energy performance over time against a baseline?



3. Implementing Action Plans

3.1. Do you have an implementation tracking system in place? If yes, what methods do you use, or what methods would you prefer?

Do you have an implementation tracking system in place?

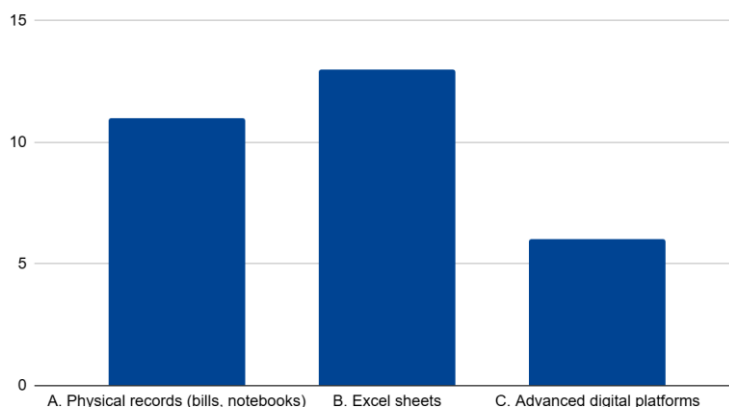


Half of respondents answered they do not have implementation tracking system and the other half use a range of different approaches to track the rate of implementation, such as regular reporting (e.g., monthly/quarterly reports), KPIs, energy management software or dashboards, internal audits or assessments, external audits or third-party evaluations, staff feedback or surveys, visual tracking tools (e.g., noticeboards, charts). A respondent from Latvia shared that a lot of reports are developed and it's not clear why they are needed and sometimes it feels like the respective regulatory authorities themselves are unclear about the set requirements - measurements, calculations, etc. A lassitude with reporting was mentioned by a French company that stated that a monthly report would be too burdensome.

3.2. What sources do you use to collect data?

Most of the companies stated that they are using physical bills, such as bills and notebooks as well as excel sheets, sometimes they use them simultaneously, and sometimes they use only one of the options. A small number of companies stated that they use advanced digital platforms (Estonia). For example, one of the respondents said that they are digitalizing data collected, for example from bills, and then analysing it using software. A French respondent praised the Enedis platform for being well designed and covering the data collection needs of the company.

What sources do you use to collect data?



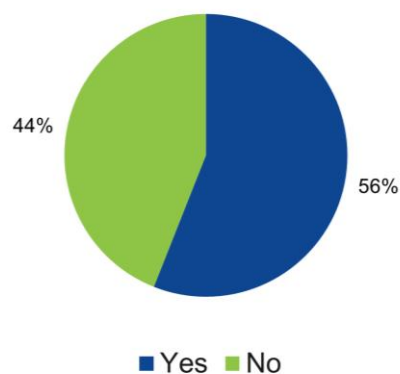
3.3. What are the difficulties in changing daily operations or procedures to be more energy efficient?

For several responding companies the staff – their habits – constitute an important challenge to increasing energy efficiency (Estonia, Malta). People leave doors open, don't switch off their equipment when they go to lunch, thus negatively contribute to power usage (Latvia). Another factor that was mentioned among the difficulties to change to more energy efficient operations was the downtime that is needed to change the machinery – while chasing the good cause, it may be financially hard to take decision to improve current infrastructure, because it is not only costly by itself, but also requires some of the systems to be switched off (mentioned by company representatives in Cyprus and France).

3.4. Does energy efficiency influence your decisions when purchasing new equipment or designing/renovating facilities?

56% of companies said that they are considering energy efficiency when acquiring new equipment. Respondents in Latvia and Spain unanimously responded negatively. The respondents from Latvia state that financial considerations carry the most weight when purchasing new equipment. Companies from Spain further iterated that they need assurance that the implemented technologies are going to be successful in the long term and that energy efficiency will not just be a passing trend.

Does energy efficiency influence your decisions when purchasing new equipment or designing/renovating facilities?



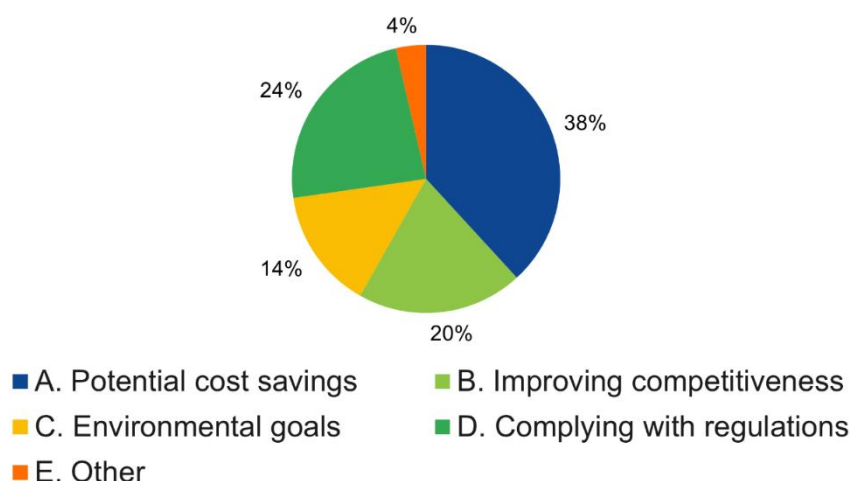
4. Monitoring & Improving Energy Efficiency

4.1. Does your management team review energy performance or energy efficiency efforts regularly? Is it the management team that decides on corrective actions regarding energy use?

The majority of companies confirmed that the management team reviews energy performance or energy efficiency efforts regularly (however, there might be variations of what is understood with “regularly”). It is the company management team that decides whether changes related to energy efficiency are needed. A representative from Latvia added that considering that the targeted companies are SMEs it is probable that not many companies have specifically dedicated staff to resolve such issues.

4.2. What motivates or would motivate your company to keep improving energy efficiency over time, beyond initial measures?

What motivates or would motivate your company to keep improving energy efficiency over time, beyond initial measures?



Overall, companies seem to be most motivated by the potential cost savings from energy efficiency improvement. This is most true for companies for whom energy represents a large cost. Other factors, such as improving competitiveness, environmental goals, comfort and complying with regulations were also noted as being important, but we assume that at the end of the day, all companies are interested in maximizing profits and minimizing costs and will do anything to achieve those goals. Some respondents (Latvia, France) specify that improving energy efficiency is a requirement from the client side.

5. Training Format Preferences

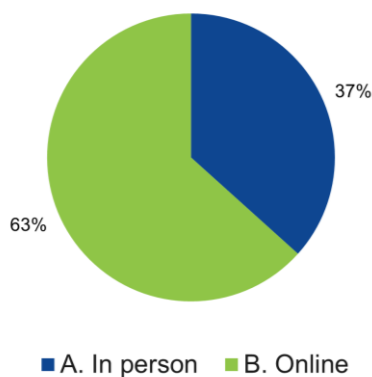
5.1. Have you previously participated in training on energy efficiency or sustainability? If yes, what benefits did you observe? If there were no benefits followed the training, why do you think this was?

Only 42% of companies questioned have previously participated in training on energy efficiency or sustainability. Several representatives said that the training was linked to the process of complying with an ISO 50001 certificate. Other motives to attend such training were the potential cost reduction tips, as well as knowledge about carbon footprint - how to lower it and how to calculate it. The benefits mentioned from the training included not only knowledge, but also peer to peer engagement such as networking and exchanging good and bad practices. Some respondents who have not yet participated in training on energy efficiency or sustainability noted that they do not see the need for training the staff.

5.2. Which training format do you think suits your business best?

Online training was the most common answer for the type of preferred training format. However, it was specified that it depends on the programme, duration of the events, as well as the required travelling to attend the training, and planned exercises (for example, seminar/group work preferred in person).

Which training format do you think suits your business best?

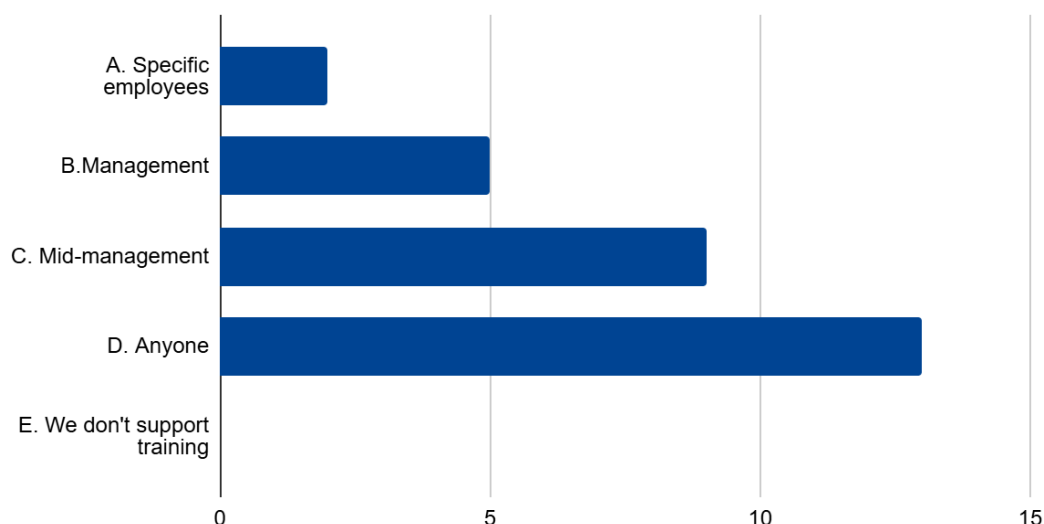


5.3. What is the ideal session length to keep engagement high without disrupting work routines?

There is a correlation between the answers to the previous question and the present. Companies that prefer online training state that the ideal session length to keep engagement high would be of 1-2h (Estonia, Malta) or 3-4h (Spain). However, respondents who preferred in-person training confirm they would attend full-day training to balance out the required travel time, and to allow opportunity for networking.

5.4. In your company, who is permitted to participate in training sessions during working hours?

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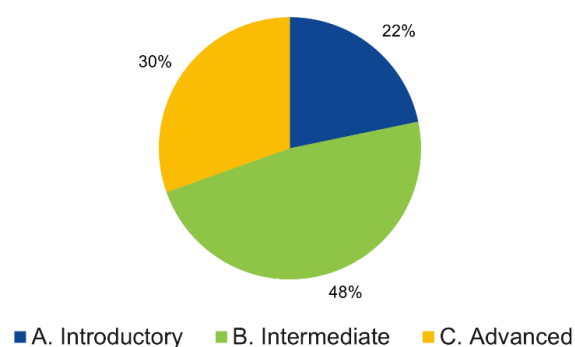


Answers to this question varied greatly. Several company representatives said that anyone from their business can participate in training, some said that only management or mid-management is able to participate in these events, and some chose that only specific employees should participate (we assume that they have an energy efficiency officer, or similar position). The answer to this question is linked to the structure of individual companies and their view of conducting a business.

5.5. What level of training do you think is most needed in your company?

Answers to this question depended on how respondents understood this question. Everyone needs basic knowledge about the issue, but if we talk about energy efficiency management or some position related to it, involved employees need more advanced information. Many respondents indicated that intermediate training level would be relevant, which can be explained by the fact that all respondents have already implemented or are planning to implement energy efficiency measures (1.1.).

What level of training do you think is most needed in your company?



5.6. Can you think of any aspects that would dissuade you from taking part or allowing your employees to take part in training sessions on energy efficiency?

Two respondents elaborated their answers to the question explaining the reasons for not taking part in training. The first one is the cost – if ROI of going to such an event is low, the company may not consider attending the training. The second answer stated that if the training session takes too much time (the duration was not specified) staff may not be as involved in the learning process as it was intended to. In addition to this point company representatives stated that the training should not be too theoretical and should provide participants with real examples and insights, because there is no use, in their view, in a “boring” description of energy efficiency subjects.

5.7. What specific topics related to energy efficiency are most relevant or urgent for your business?

Some of the respondents provided their thoughts on what their “hot” topics are, and the list of ideas is as follows:

- Bureaucratic procedures, which hinder the desire for improvement.
- Grant applications that are no longer attractive due to the difficulty of the process and the requirements imposed by public services. They also mention that sometimes they are asked for money up front, which blocks other avenues of their business.
- Promotion of new technologies that are not really implemented in the market (e.g., electric chargers/electric cars).
- Public infrastructure that supports this initiative.
- Photovoltaic system installation and use.
- Learning from best practices. High-level ideas from other companies.
- Automated power monitoring systems.
- Energy security and Energy efficiency.
- Battery storage and its implementation.

5.8. Do you own and/or manage entirely your facilities, or do you rent?

The majority, or 80% of respondents, said that they own the property that they are conducting their business on, the remaining 20% are renting their facilities.

Conclusion

The focus group discussions have provided qualitative insights into the specific requirements, preferences and challenges related to implementing energy efficiency measures within SMEs of the target NACE sectors. Several conclusions can be drawn from the discussions held across Europe and, possibly, the most important being that the target audience – SMEs of NACE codes C20 to C22 and C25 to C29 - cannot be considered as a homogenous group. Differences in the answers provided by respondents of the focus group discussions relate to many factors including the diverse sectors targeted in the project, location, specific preferences and motivation, company size, encountered obstacles, etc. The challenge within the EcoSMEnergy project will be to find a way to incorporate a certain level of flexibility or graduality into the training programme to appeal to different companies within the target group.

Furthermore, considering the diverse responses to questions on Training Format Preferences, the focus group discussions showed that flexibility also needs to be incorporated into the practical side of the training organisation and that the training content should be formatted in modules. A modular approach offers the advantage of the flexibility to design the training sessions in a way which best suits the needs of the SMEs from different parts of Europe and will allow project partners to successfully reach the related numerative KPIs.

However, some common tendencies can be extracted from the focus group discussions, the most important being that the respondents demonstrate an existing level of awareness regarding energy efficiency. This finding has a significant impact on the development of the training content because this shows that the training needs to aim for an intermediate level, for companies that have already started to take steps towards better energy efficiency and sustainability. Also, the focus group discussions revealed a certain sentiment of caution when discussing energy efficiency, as companies highlighted the burden of sustainability related reporting and auditing, changing regulatory requirements, changing financial incentives and financial limitations to implementing energy efficiency measures. This leads to believe that SME engagement in the upcoming activities could represent an intensive effort for the project partners.



Project Partners



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