

O2.1. - Piloting Energy Transition Roadmap for SMEs



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1. Summary

Within the framework of Output 2.1, the consortium partners implemented pilot actions focused on developing Energy Transition Roadmaps for SMEs. A total of **52 SMEs** actively participated in deep engagement activities such as personalized mentoring, audits, and consultations.

The primary methods deployed included:

1. **Direct personalized mentoring and audits** (LEASP, DEX IC, RARS, BSC SME Ruse, Energiaklub, FIB).
2. **Comprehensive educational programs** ("crash courses") combined with digital tools (SBA).
3. **Integration of technical advisory with funding support** (RARS, LEASP).

The pilots resulted in concrete actionable plans for companies, the identification of energy-saving measures (ranging from soft measures to major investments), and significantly improved SME readiness to apply for external funding.

2. Engagement Strategy (Reaching the Target Group)

How partners reached SMEs, channels used, and selection criteria.

PP1 (LEASP)

Approach: SMEs were engaged through direct contact via the LEASP and Chamber of Commerce networks—mainly through personal visits on site, but also via phone calls and emails. The best approach to reach SMEs was through direct on-site engagement by LEASP representatives.

Selection Criteria: 1. Energy intensity; 2. Potential for involvement (willingness to cooperate); 3. Capacity to implement energy-saving measures; 4. SMEs that have not received similar support or participated in similar initiatives. The most important factor we observed after reaching out to SMEs was their readiness to cooperate and openness to the energy transition.

PP3 (FIB)

Approach: SMEs were engaged through events, social media posts, business and personal contacts, as well as e-mails and phone calls. The most effective channel proved to be phone calls to business and personal contacts, as discussions at events are often forgotten and written information is frequently left unread.

Selection Criteria: 1. Energy-saving potential; 2. Commitment to implement sustainability measures; 3. Authorization for available funding programs; 4. Operational readiness for improvement; 5. Expected impact of the proposed interventions. The selection focused on a transparent and consistent framework to ensure companies could benefit effectively from the support

PP5 (DEX IC)

Approach: Personal networks, Změna k lepšímu, regional innovation centres, direct e-mailing. LinkedIn and Facebook communication, DEX IC website, and in-person outreach at regional events. Personal network/in-person at regional event was the most effective.

Selection Criteria: High or rising energy consumption / clear potential for energy savings. Willingness to cooperate and share basic consumption data. SMEs with real potential for measurable improvements and realistic ability to implement proposed measures, ensuring the pilot leads to results.

PP6 (SBA)

Approach: Direct contacts with SMEs through SBA and SIEA network + network of our experts (lecturers), e-mail campaigns, info webinar, social media campaigns, newsletters. Newsletters, Direct mailing, Expert recommendations were the most effective.

Selection Criteria: Following the application form guidelines - Energy intensive SMEs. Reflecting the recruiting campaign, major criterion was energy intensive character of the business and interest in the topics of energy efficiency and RES.

PP7 (RARS)

Approach: Initial contacts made through RARS network and municipalities, followed by direct meetings, e-mail campaign, 2 information sessions. Direct contact and mentoring proved most effective due to established trust and RARS's long-term cooperation with SMEs.

Selection Criteria: SMEs were selected based on their readiness to cooperate, openness to energy efficiency improvements, and interest in tailored mentoring by RARS. Priority was given to those with higher energy consumption, motivation to reduce costs, and long-term potential in the SMEnergy network.

PP8 (BSC SME Ruse)

Approach: Mailing, events, newsletter, social media posts, personal contacts, existing SMEs database contacts. Events (wide range of topics/services presented; opportunity for direct Q&A) and Personal contacts (trust) were the most effective.

Selection Criteria: Open call; Involvement of SMEs from the beginning of the project; Interest/ willingness to cooperate and join the piloting; External expert's opinion and expertise.

PP11 (Energiaklub)

Approach: Social media (Facebook, Instagram, LinkedIn), Energiaklub website and newsletter, direct outreach to chambers and professional associations, press articles. No single channel proved significantly more effective than others. However, direct outreach through professional networks and targeted newsletters generated the few concrete SME applications we received.

Selection Criteria: Applicants had to meet three criteria: (1) qualify as an SME, (2) express interest in energy efficiency improvements or investments, or (3) seek an initial diagnosis of their current energy losses.

3. The Roadmap Pilot Activity

What was the main concrete pilot activity implemented?

PP1 (LEASP)

The main concrete pilot activity implemented was the personalized mentoring and advisory support for SMEs aimed at improving their energy performance. LEASP worked directly with selected companies to assess their current energy situation, identify opportunities for savings and efficiency improvements, propose both soft and investment measures, and provide guidance on available funding mechanisms. The pilot followed a three-step approach: 1. Assessment of the current energy situation; 2. Identification of improvement measures and funding mechanisms; 3. Support in applying for funding and wider outreach.

PP3 (FIB)

The main concrete pilot activity was the development of individualized energy transition roadmaps. These were based on interviews, energy data collection, and expert assessments, focusing on energy efficiency measures, renewable energy options, and future investment planning for the participating SMEs

PP5 (DEX IC)

The main activity of the pilot was the delivery of personalised advisory support to selected energy-intensive SMEs, combining the SMEnergy digital tools with expert consultations to produce a clear and actionable transition roadmap for each company. The findings were then discussed in follow-up consultations, where they were translated into practical recommendations tailored to each SME's sector, priorities and financial constraints.

PP6 (SBA)

The pilot program comprises 4 modules and 8 specific lectures providing interested parties a complex overlook of the topic of energy efficiency measures and tools required, RES technology overview and potential of

each in the particular sector of SME interest. The core idea was to support companies considering energy transition or those who stepped on their way to energy optimisation to give them all necessary tools and support they can capitalize on anytime now, or later on the SMEnergy online platform.

PP7 (RARS)

Pilot 1: Development of direct advisory and mentoring support to help SMEs prepare and access energy-efficiency funding.

Pilot 2: Development of practical energy transition guidelines for manufacturing SMEs, including steps for efficiency assessment, investment planning and use of funding opportunities.

PP8 (BSC SME Ruse)

"Light" SME energy audit and sustainability action plan elaboration.

PP11 (Energiaklub)

Participating SMEs received tailored consultancy including an energy loss audit, PV system sizing and optimisation, and GHG inventory development. These steps will form the basis of an individual transition roadmap for each company.

4. Results and Impact

How does this roadmap specifically help SMEs, and what improvements were identified?

PP1 (LEASP)

Value: This roadmap supports SMEs in their energy transition by providing a structured and personalized approach to improve energy efficiency and adopt renewable solutions. It helps companies first understand their current energy situation, then identify concrete measures to reduce consumption and costs.

Improvements: It is somewhat impossible to concretely determine the percentage of energy efficiency improvement, as it varies from one SME to another. SMEs implementing only soft measures could improve their

energy efficiency by around 5%. Those that decide to make larger investments (through available subsidies) could enhance their energy performance and reduce their energy bills by up to 70%.

PP 3 (FIB)

Value: The roadmap helps SMEs by structuring their energy transition, identifying major energy consumption drivers, and highlighting feasible efficiency measures. It supports strategic decision-making for cost reduction and decarbonisation by evaluating various renewable energy options.

Improvements: Identified potential efficiency improvements range from approximately 5% (through organizational and soft measures) up to 20–30% through larger investments such as heat recovery, renewable energy systems, and process optimisation.

PP5 (DEX IC)

Value: The roadmap helps SMEs by transforming the initial diagnostic findings into a clear and structured improvement pathway. It enables companies to understand where their current inefficiencies originate and how to reduce operating costs. It also supports long-term decision-making.

PP6 (SBA)

Value: One stop shop for all necessary and accessible knowledge aggregated under one specialized crash course. Provides a practical step-by-step approach: awareness -> assessment -> identification of improvement areas -> access to funding and advisory support.

PP7 (RARS)

Value: Provides a structured and replicable roadmap: from awareness and advisory-level assessment to improvement planning and access to funding. Strengthens SME capacities to understand and prepare energy measures.

Improvements: Estimated 10-25% potential reduction based on SME-reported data and general benchmarks from previous projects; several SMEs also initiated PV system planning.

PP8 (BSC SME Ruse)



Value: It raises awareness in the SME managers/owners for their energy usage and costs and provides simple solutions and advice on measures which could be implemented.

Improvements: Customised recommendations per each SME, such as to increase the share of energy supplied from RES in the company and to use PV installation in the expansion of the manufacturing capacity; Machinery replacement or upgrade; PV installators training; usage of hybrid electrical cars, full energy audit.

PP11 (Energiaklub)

Value: It provides a structured overview of current energy losses, identifies concrete improvement options, and gives direction for future investments. The roadmap also introduces GHG accounting and solar PV potential, helping SMEs to plan realistic next steps.

5. Challenges and Lessons Learned

What were the biggest challenges encountered during implementation?

PP1 (LEASP)

Identifying suitable SMEs willing to engage and perceive the benefits proved challenging, since One-Stop Shops are already operational in Slovenia. This made it more difficult to demonstrate the additional value of the SMEnergy pilot activities.

PP5 (DEX IC)

Finding SMEs willing to cooperate and dedicate time to the testing process. For most SMEs, the benefits we offered were not considered attractive enough to motivate participation.

PP3 (FIB)

The biggest challenges encountered included high investment costs and complex regulatory conditions. Implementation was also hindered by a lack of specialized experts, difficulties in comparing technical offers, and uncertainty regarding available financial support mechanisms.

PP6 (SBA)

Focus, engagement and willingness to share valuable insights by the participants of our crash course.

PP7 (RARS)

Limited SME time, lack of standardized energy data, differences in technical readiness, and slower communication in smaller municipalities. Limited technical data from SMEs and need for more tailored examples per manufacturing subsector.

PP8 (BSC SME Ruse)

Lack of funding for implementation of all recommendations.

PP11 (Energiaklub)

Engaging suitable SMEs took longer than expected. It was also difficult to obtain firm offers from energy experts, which delayed the start of consultancy activities.

6. Replicability

What is the replication potential of this approach (1-5 scale) and why?

PP1 (LEASP)

Score: 5. In some way the similar approach is already taking place through Slovenian OSS. Although SMEs are not the one seeking support as much as other sectors do, but clearly this support (OSS/ personalised advice) has a great replication potential.

PP 3 (FIB)

Score: 4. The approach is highly transferable to other SMEs and sectors, as it is based on structured interviews and expert guidance. However, scaling effectively requires sufficient advisory capacity and clear access to funding.

PP5 (DEX IC)

Score: 5. Templates and materials are easy to reuse for other companies. Everything developed was intentionally designed to be replicatable, allowing the approach to be applied to additional SMES.

PP6 (SBA)

Score: 5. All materials produced during the piloting was designed in the replicability fashion. Hence each workshop was recorded, digitalized and whole content created will be part of the knowledge base/ repository for further distribution and accessibility after the piloting phase.

PP7 (RARS)

Score: 5. The approach is easily replicable through RARS, using its GEKOS digital service and mentoring framework as a one-stop platform for SMEs. This model can be adapted for municipalities and aligns well with future non-financial and funding support schemes.

PP8 (BSC SME Ruse)

Score: 5. Elaborated templates are easy to fill in, the approach is not time-consuming and quick and yet allows for raising awareness and customised advice for each SME.