WP7 – Evaluation - Intermediate Report

1. Executive summary
2. Objectives of the work package
3. Project evaluation methodology
4. Companies surveyed
5. Energy efficiency
6. Investment
7. Action Plan
8. Conclusion

WP7 – Intermediate Report - Executive Summary

Methodology: Project evaluation adopts a comprehensive approach based on OECD criteria, focusing on six key areas including efficiency, effectiveness, and sustainability. It emphasizes the importance of accurate data collection and analysis for assessing energy performance.

Objectives: Evaluation, and more largely EE4HORECA project, aim to significantly improve energy efficiency in SMEs and reduce carbon emissions. They highlight the need to capitalize on these improvements for sustainable business practices and environmental benefits.

Evaluation Process: Detailed assessment through tailored questionnaires, evaluating SMEs' energy consumption, CO2 emissions, and energy management practices. Prioritizes gathering robust data for informed decision-making.

Findings and Challenges: Based on data from 84 firms, the results show that a large majority tend to adopt energy efficiency measures that are quick and easy to implement, such as raising staff awareness and improving lighting systems. Conversely, the study highlights several key barriers, including limited access to funding, time constraints, and a lack of technical expertise. In addition, preliminary findings indicate that larger companies are more likely to implement and invest in energy efficiency measures (EEMs), while micro-enterprises continue to prioritize more immediate economic concerns.

LIFE: EE4HORECA Evaluation Report

1. Objectives of the WP7

Recap of the ambition

« The EU Green Deal aims to make Europe the first climate neutral continent by 2050.
One of the main objectives is to initiate, support and accelerate the transition of European companies to a sustainable growth model. »

In this context, the dedicated WP7 aims to

- *Measure the level of improvement in the energy performance of the beneficiary SMEs*
- *Evaluate other relevant changes in the participating SMEs to become more efficient in energy consumption and reduction of CO2 emissions*
- *Capitalization of results in the participating countries.*

The evaluation scheme should take into account the OECD key evaluation criteria and highlight the following points:

- **EFFICIENCY: How well are the EU resources being used?**
- **EFFECTIVENESS: Is the intervention achieving its objectives?**
- **COHERENCE: How well does the intervention?**
- **RELEVANCE: Is the EU intervention doing important and adequate things for beneficiaries?**
- **SUSTAINABILITY: Will the benefits last?**
- **IMPACT: What difference does the intervention make?**

3.1. Project evaluation – Methodology – Questionnaire and data collection

Co-design of the quantitative questionnaire

Why?

- The questionnaire initially aims to ascertain each company's baseline in terms of energy efficiency, investments, and action plan. It will then monitor these aspects over the remaining months of the project to assess the impact of its interventions.
- Furthermore, the questionnaire will explore the company's practices and customs and will assess key performance lever.

How?

- WP7, in collaboration with local energy efficiency and energy sector specialists, created a preliminary version of the questionnaire.
- Upon completion, the questionnaire was shared with work package leaders and partners for feedback.
- Ultimately, the questionnaire was made available as a fillable Word and through Sphinx (online Survey software).

Data collection

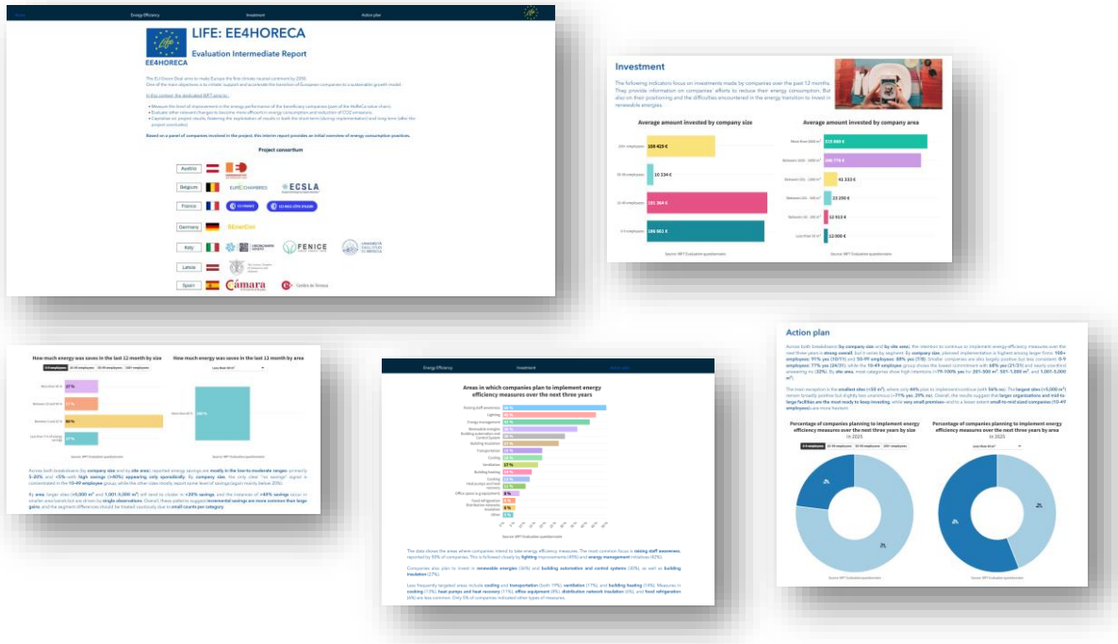
How?

- The questionnaire was distributed to the country partners and therefore beneficiary companies from August 2025 until November 2025.
- These companies comprise those attending training sessions.
- Partners from France, Italy, Latvia and Spain ensured that the data collected was comprehensive and accurately integrated.
- Local partners oversaw the data collection process of their own country.

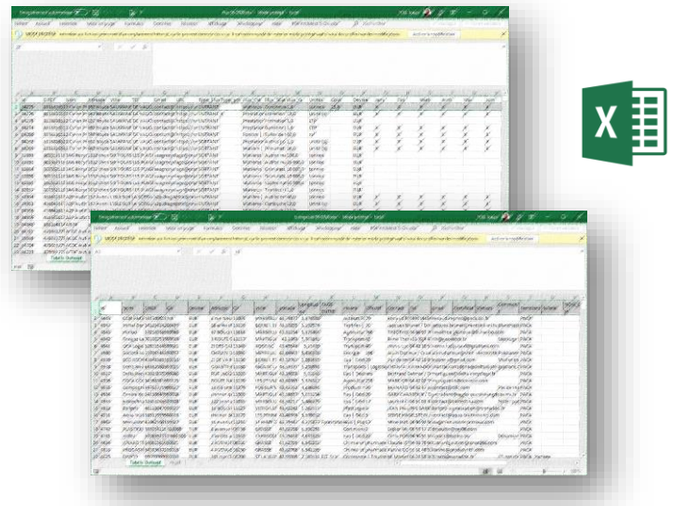
3.2. Project evaluation – Methodology – Data visualisation and evaluation report

The data collected has undergone advanced processing to derive valuable information for informed decision-making and to integrate the evaluation system into an ongoing improvement process. The following deliverables are available to relevant stakeholders:

A data visualisation tool accessible online



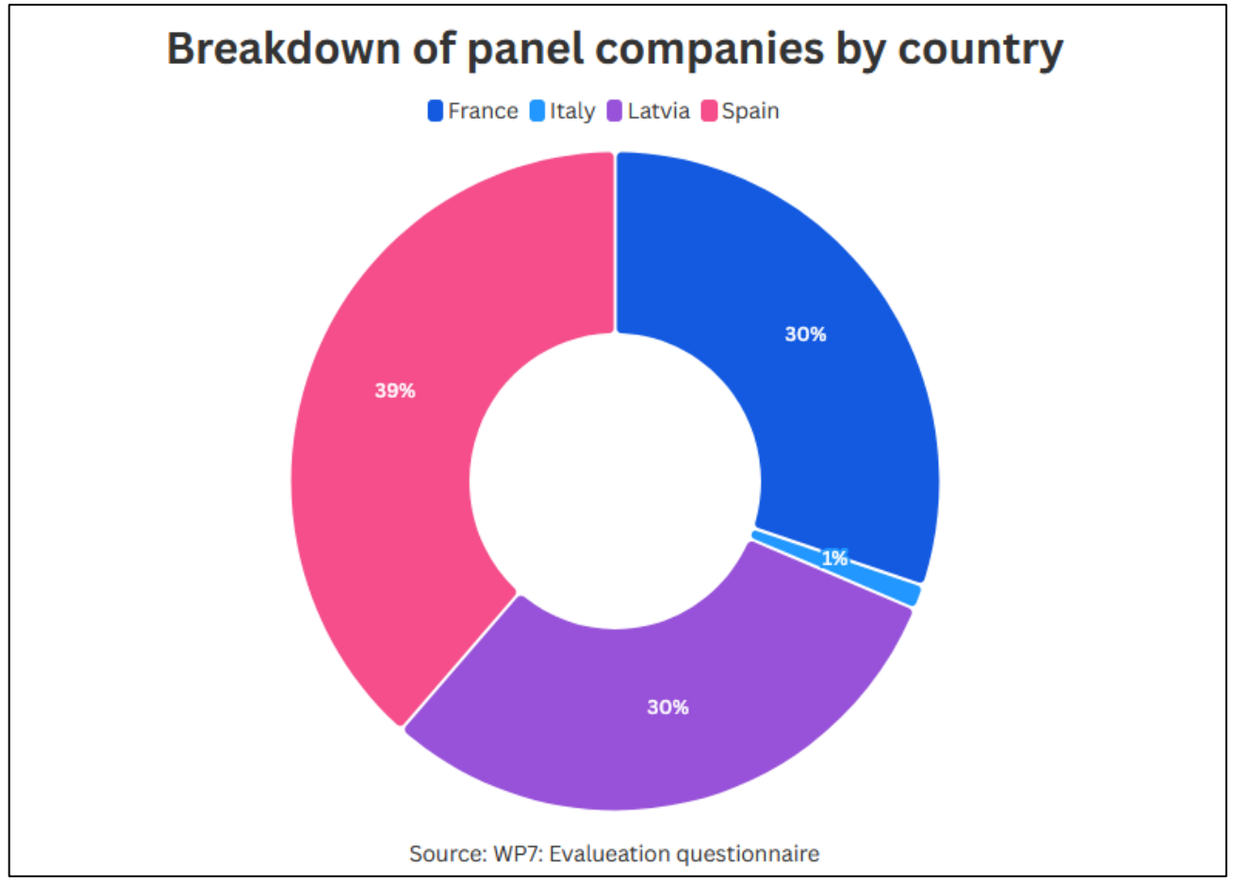
Excel files of the collected data



4. Companies surveyed

In total, **84 companies** were surveyed through this data collection campaign.

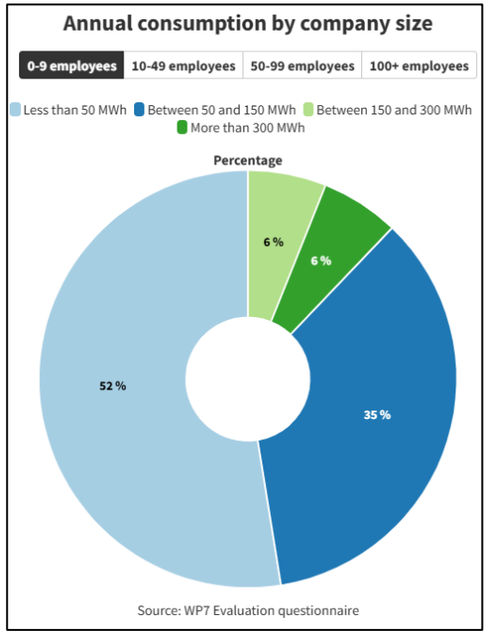
39% of them belonged to **Spain** , **30%** to **France and Latvia** and **1%** to **Italy**.

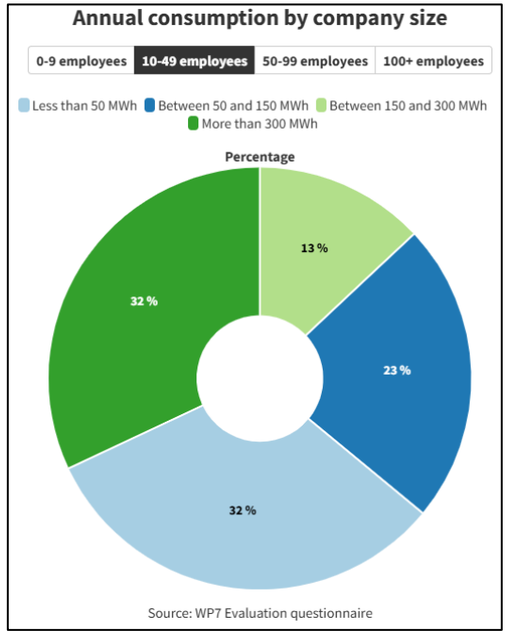


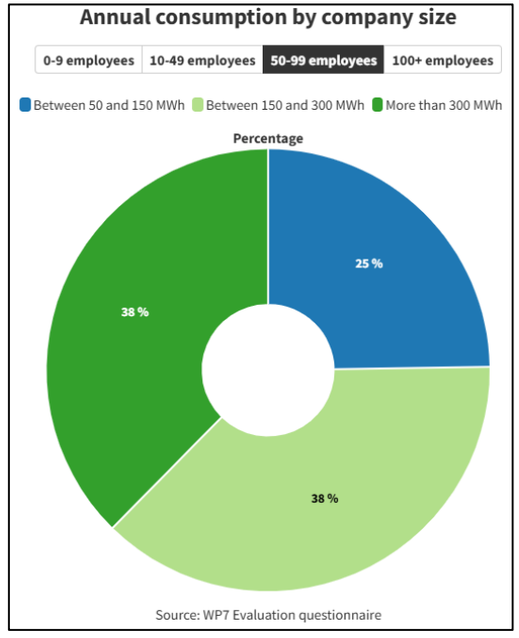
5.1. Energy efficiency – Average electricity consumption

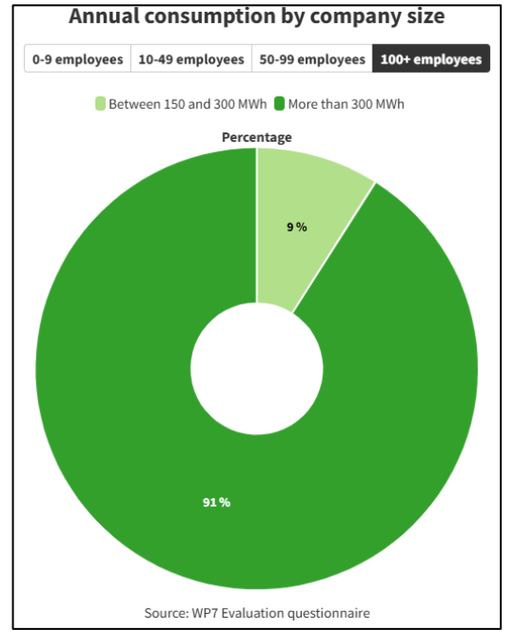
These figures show a clear **scale effect**: estimated electricity consumption generally increases with both **company size** and **site area**. Smaller companies (especially **0–9 employees**) are mainly concentrated in the **lower bands (<50 MWh** and **50–150 MWh**), while **100+ employee** organizations are overwhelmingly in the **highest band (>300 MWh)**.

A similar pattern appears by floor area: **very small sites (<50 m² and 50–200 m²)** are mostly in the **<50 MWh range**, whereas the **largest sites (>5 000 m²)** are predominantly **>300 MWh**. Mid-range areas (e.g., **201–500 m²**) tend to cluster in the **50–150 MWh** band. As some groups have small counts, the segment-level differences should be read as **indicative trends** rather than precise benchmarks.









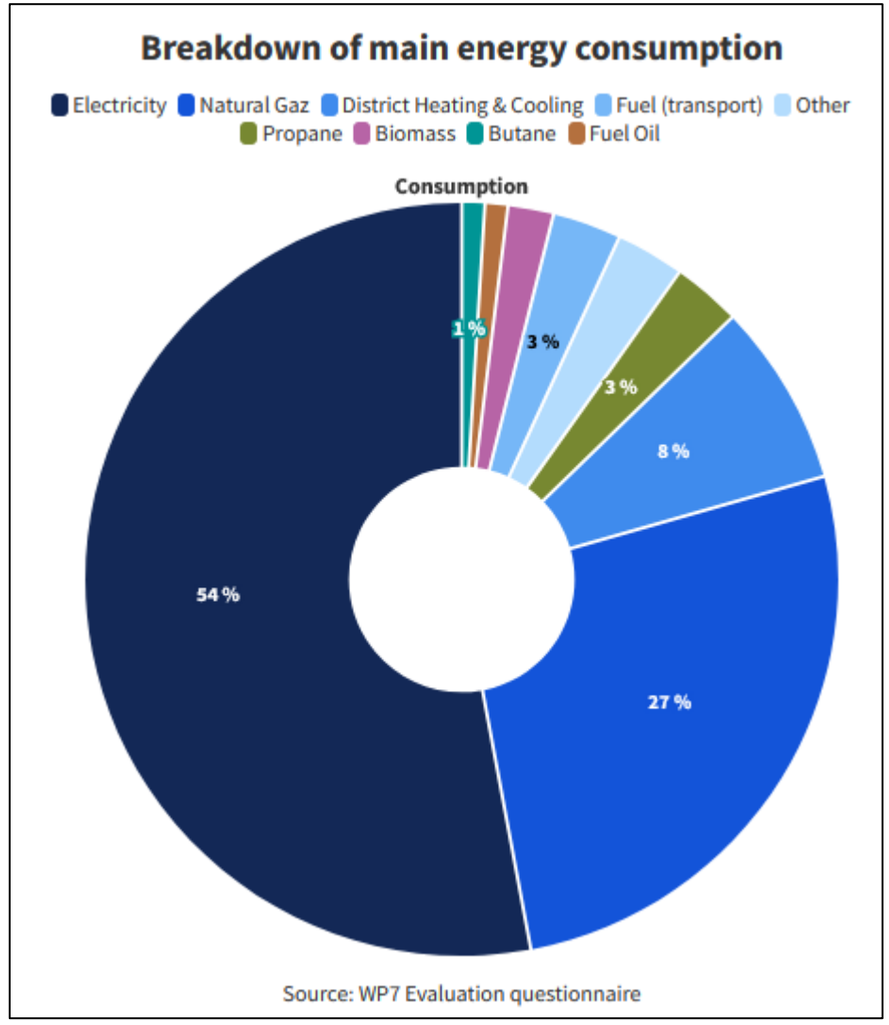
5.2. Energy efficiency – Breakdown of main energy consumption

The graph shows the **energy consumption breakdown** reported by the surveyed companies.

Electricity is by far the dominant energy source, accounting for **54%** of total consumption. This reflects a strong reliance on electric-powered processes across businesses. **Natural gas** represents the second largest share at **27%**, indicating its continued importance for heating and certain industrial applications.

District heating and cooling accounts for **8%**, showing that a smaller portion of companies are connected to centralized energy networks. Several other energy sources each represent only a small fraction of the total: **fuel for transport (3%)**, **propane (3%)**, and **other sources (3%)**.

Biomass (2%), **butane (1%)**, and **fuel oil (1%)** are marginal, which suggests that traditional fossil fuels beyond gas are now used only by a minority of companies. Overall, the results highlight a strong trend toward electricity-based energy use, with natural gas still playing a significant role, while alternative or legacy fuels remain much less common.



5.3. Energy efficiency measures implemented over the past 12 months

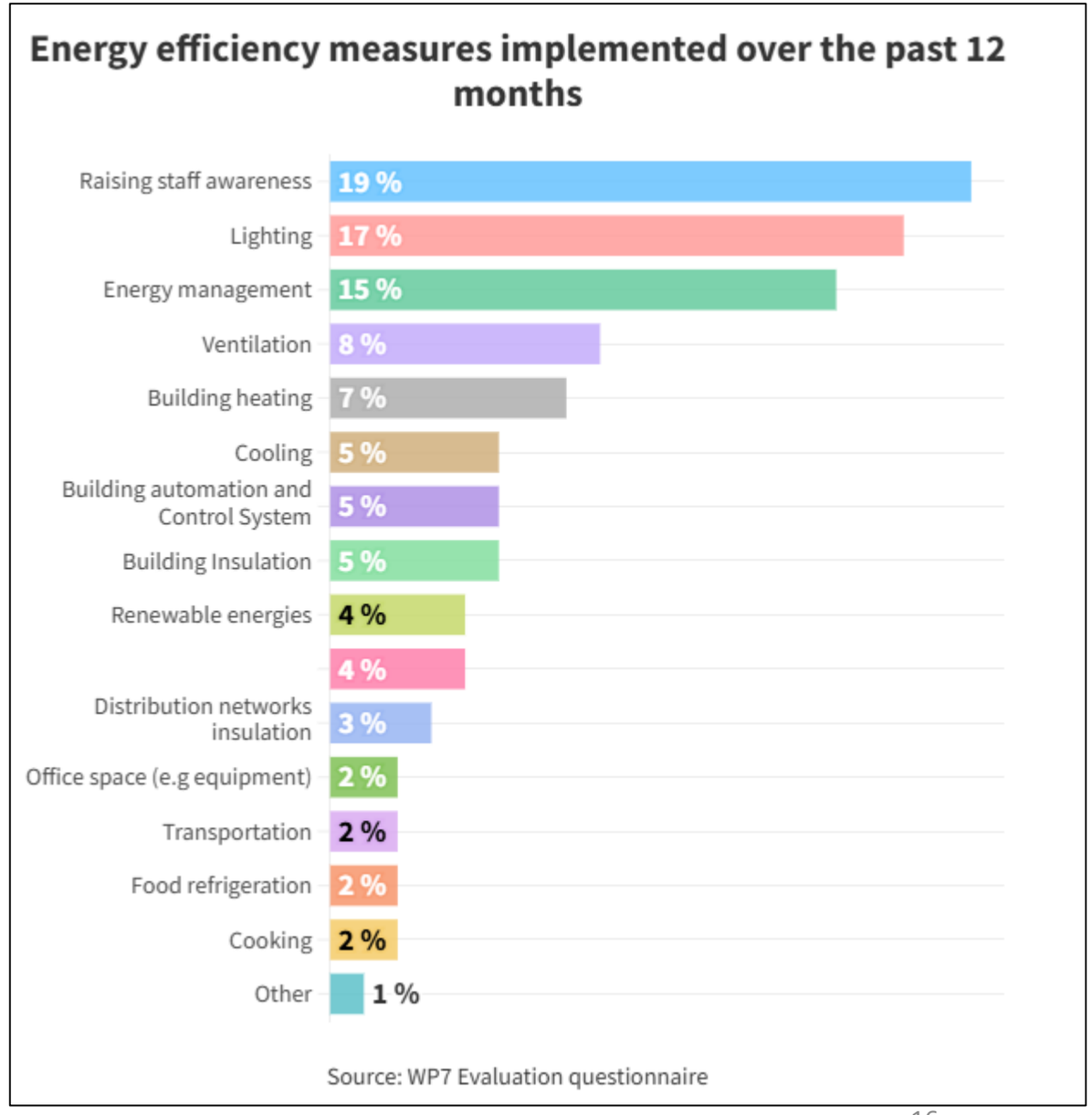
The most common measure is **raising staff awareness (19%)**, showing that many companies consider employee engagement a key driver of energy savings. This is followed closely by **lighting improvements (17%)**, which remain one of the simplest and most cost-effective efficiency actions.

Energy management systems (15%) also play a major role, indicating growing interest in monitoring and optimizing energy use. Measures related to **ventilation (8%)** and **building heating (7%)** are less common but still significant.

Several structural interventions—such as **building insulation**, **building automation and control systems**, and **cooling improvements**—each account for **5%** of the reported actions, reflecting more technical and sometimes costlier upgrades.

Technologies such as **heat pumps and heat recovery (4%)** and **renewable energies (4%)** also appear, suggesting that some companies are beginning to adopt more advanced or sustainable solutions.

Less frequently cited measures include **distribution network insulation (3%)**, c**ooking and food refrigeration equipment (2% each)**, **transportation efficiency (2%)**, and improvements in **office equipment (2%)**.



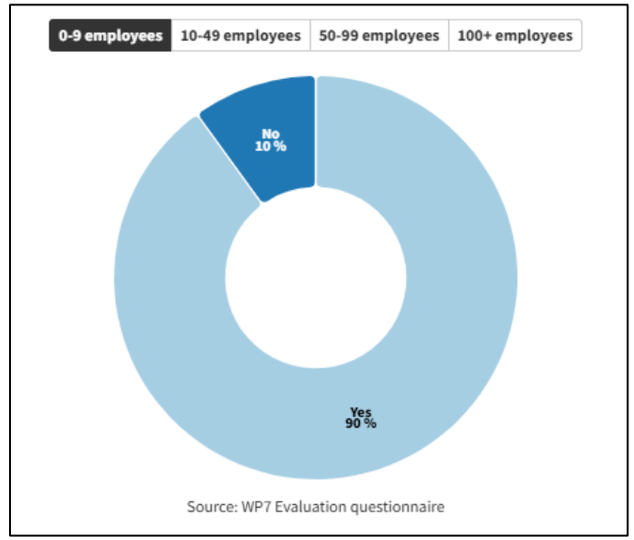
5.4. Energy efficiency measures implemented by company size

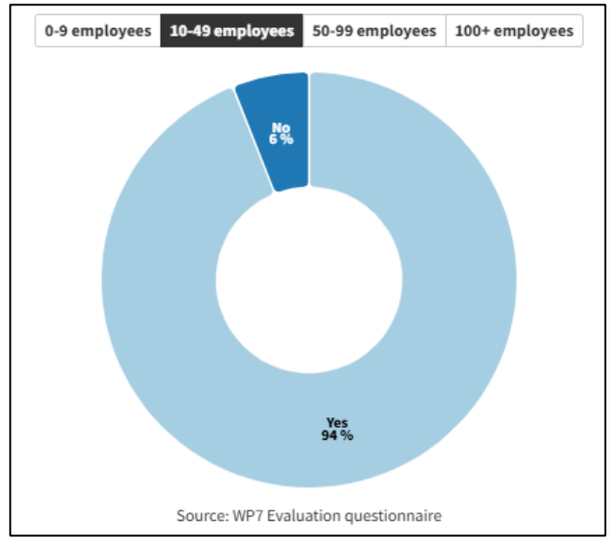
Overall, the uptake of energy-efficiency measures in the last 12 months is **very high across the sample**, with near-universal implementation in most segments.

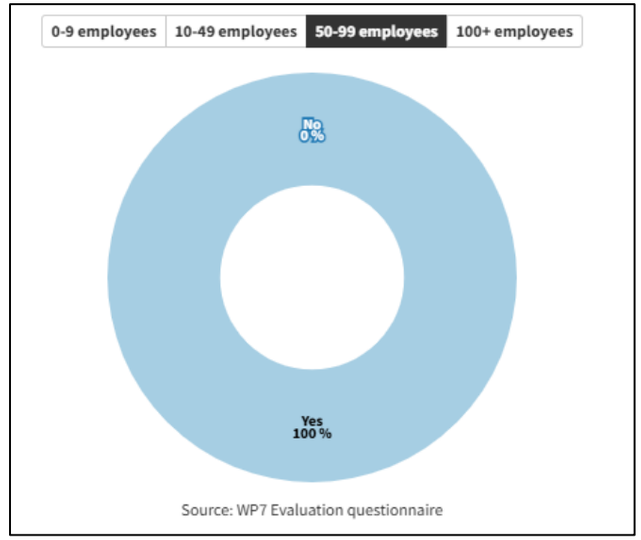
By company size, adoption is **100%** for **50–99 employees** (n=8) and **100+ employees** (n=11), and remains very strong for **10–49 employees** (**94%,** n=29). Only the smallest firms show a slightly lower—but still high—rate: 0–9 employees report **90%** adoption (n=28), with **10%** not implementing (n=3).

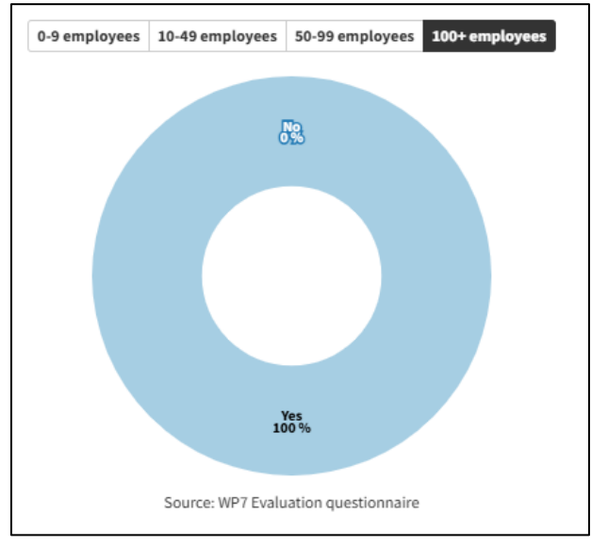
By site area, implementation is systematically 100% for all sites **above 200 m²** (201–500 m², 501–1 000 m², 1 001–5 000 m², and >5 000 m²), while the lowest adoption appears in the smallest premises: **<50 m²** shows **67% yes / 33% no** (n=6/3), and **50–200 m²** shows **84% yes / 16% no** (n=16/3).

Given the smaller counts in some categories, differences should be read as directional, but the overall message is clear: **implementation is widespread**, **especially among larger organizations and larger sites.**







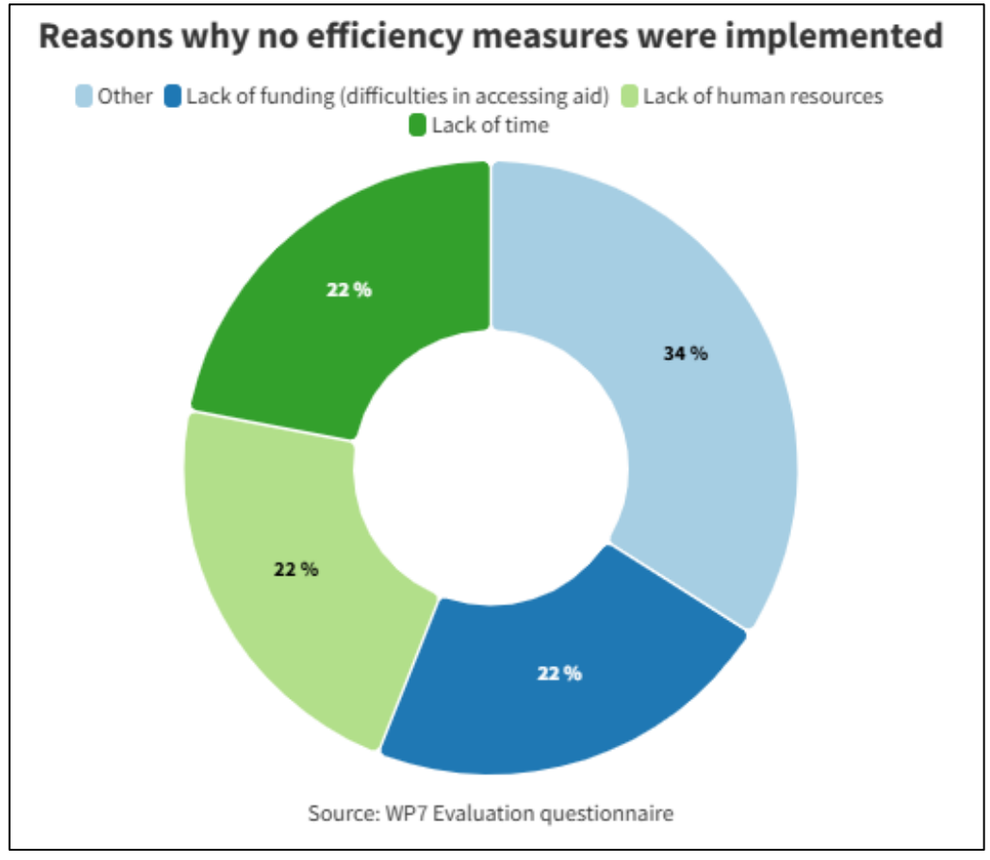


5.5. Energy efficiency measures – Reasons as to why no energy efficiency measures were implemented

The reasons for not implementing energy-efficiency measures are spread across several barriers rather than dominated by a single one.

“Other” is the most frequently cited explanation (34%), suggesting a range of company-specific constraints not captured by the predefined options.

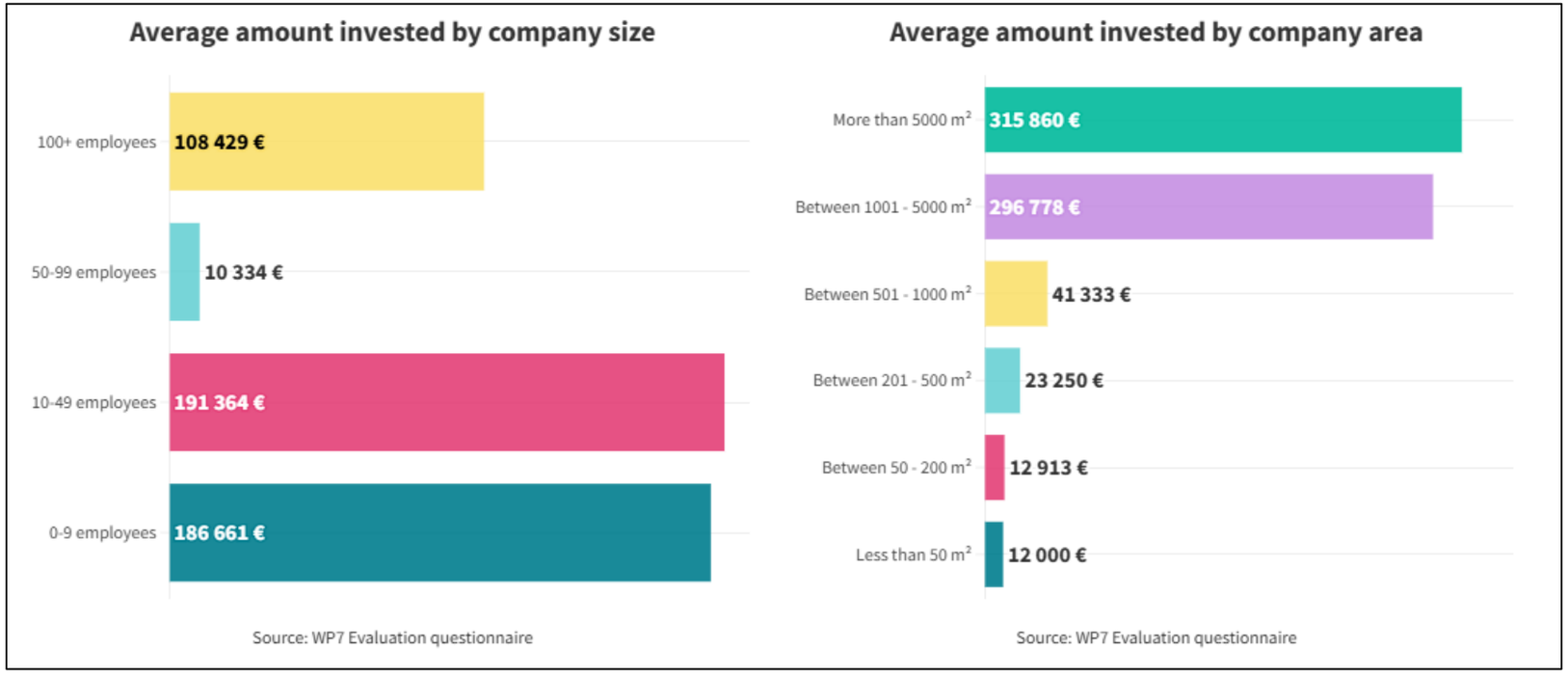
The remaining reasons are equally important (22% each)—lack of funding / difficulty accessing aid, lack of human resources, and lack of time—pointing to a balanced mix of financial, capacity, and operational limitations.



6.1. Investment made regarding energy efficiency

Across both charts, implementation spending clearly scales with **project scope**, but not always in a linear way. By area, the pattern is very strong: the largest sites (over **1 000 m²**, especially >**5 000 m²**) invest far more (around **€297k–€316k**) than smaller spaces (roughly **€12k–€41k**), suggesting that larger footprints require substantially heavier deployment.

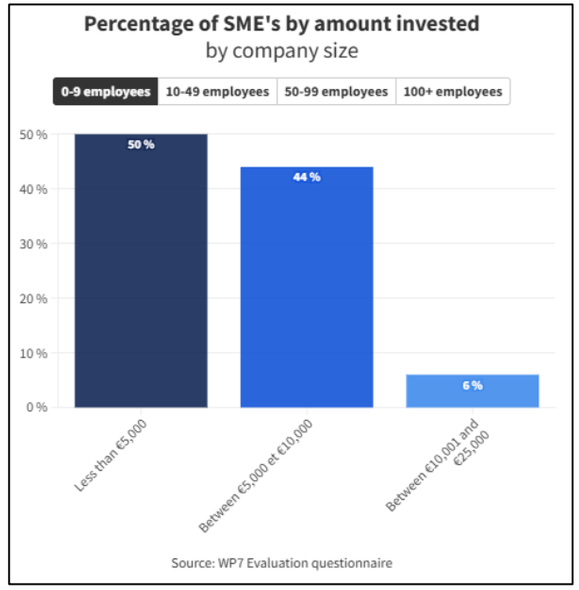
By company size, the trend is less straightforward: the highest averages appear in the **0–9** and **10–49 employee** groups (around **€187k–€191k**), while **100+ employees** spend less on average (**€108k**), and **50–99 employees** is a clear low outlier (**€10k**). Overall, the results suggest that **physical scale (area) is the most consistent driver of spend**, while workforce size may reflect differences in project complexity, rollout strategy, or sample effects.

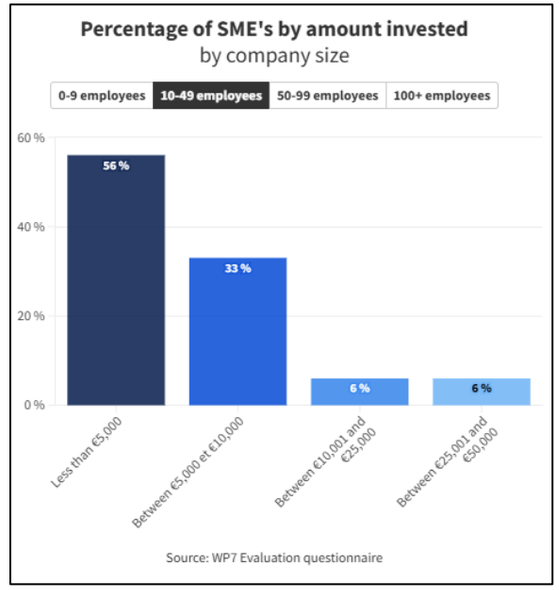


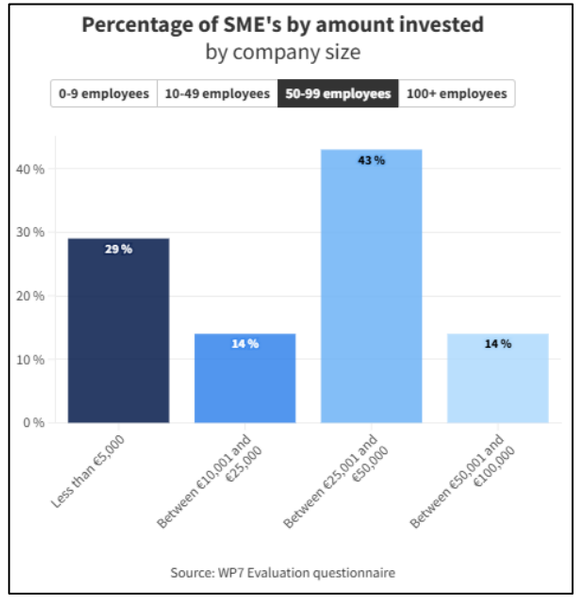
6.2. Investment made regarding energy efficiency by company size

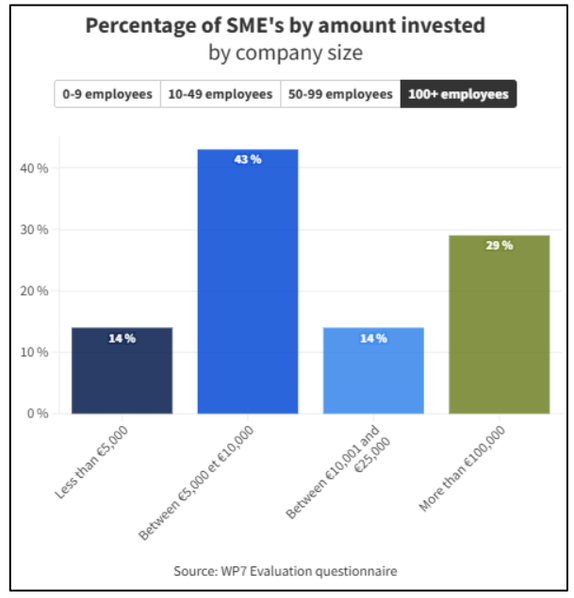
The data shows that **smaller companies (0–49 employees)** mainly invest low amounts in energy efficiency, with most spending under €10 000. **Medium-sized firms (50–99 employees)** invest much more, often between €25 000 and €50 000.

Large companies (100+ employees) show the **widest range of investments**, including the highest levels, with **29% investing more than €100 000**. Overall, investment capacity increases strongly with company size.





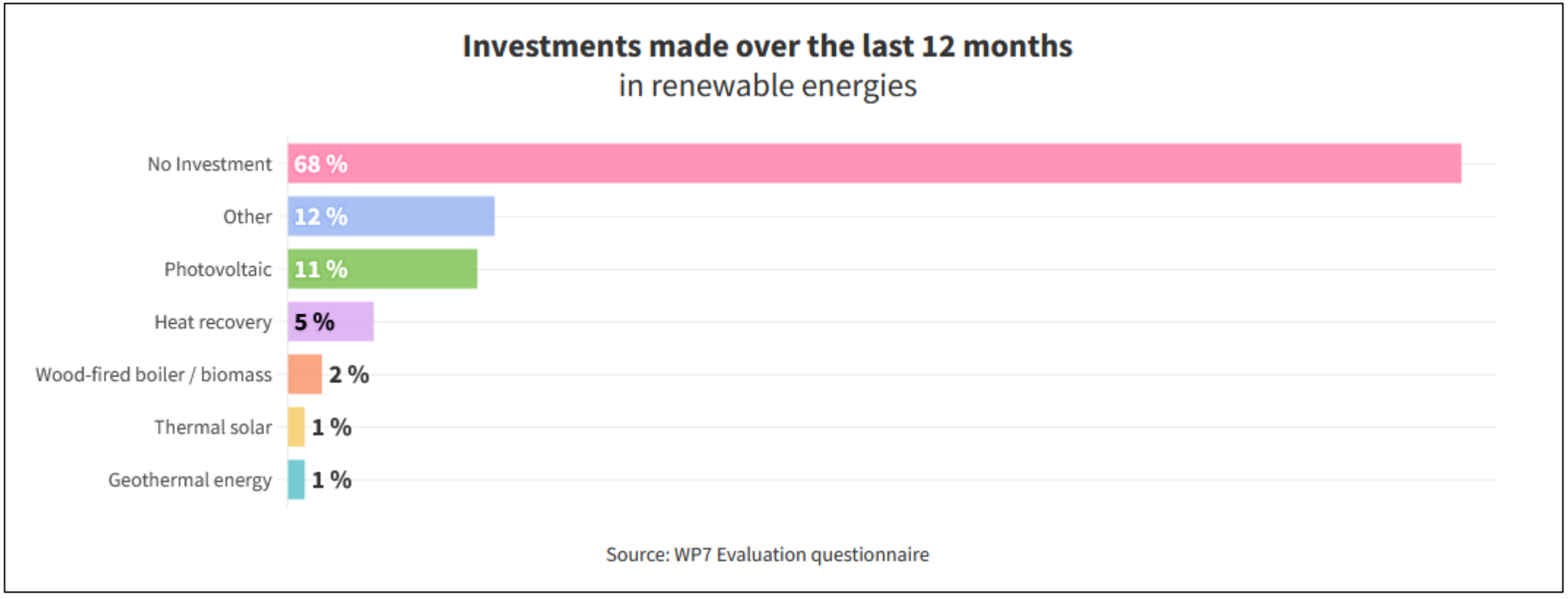




6.3. Investment in Renewable Energies

The chart shows that **most companies made no renewable energy related investment in the last 12 months (68%)**, highlighting a strong gap between intention and action. Among those who did invest, spending is concentrated in a few areas: **Photovoltaic systems (11%)** are the most common specific investment, followed by **“Other” (12%)**, which suggests a variety of smaller or less standard projects.

More capital-intensive or technically complex options remain marginal—**Heat recovery (5%)**, **Biomass/wood-fired boilers (2%)**, and **Thermal solar** and **geothermal at just 1% each**—indicating that recent investment has largely favored more accessible, widely adopted solutions rather than diversified energy technologies.



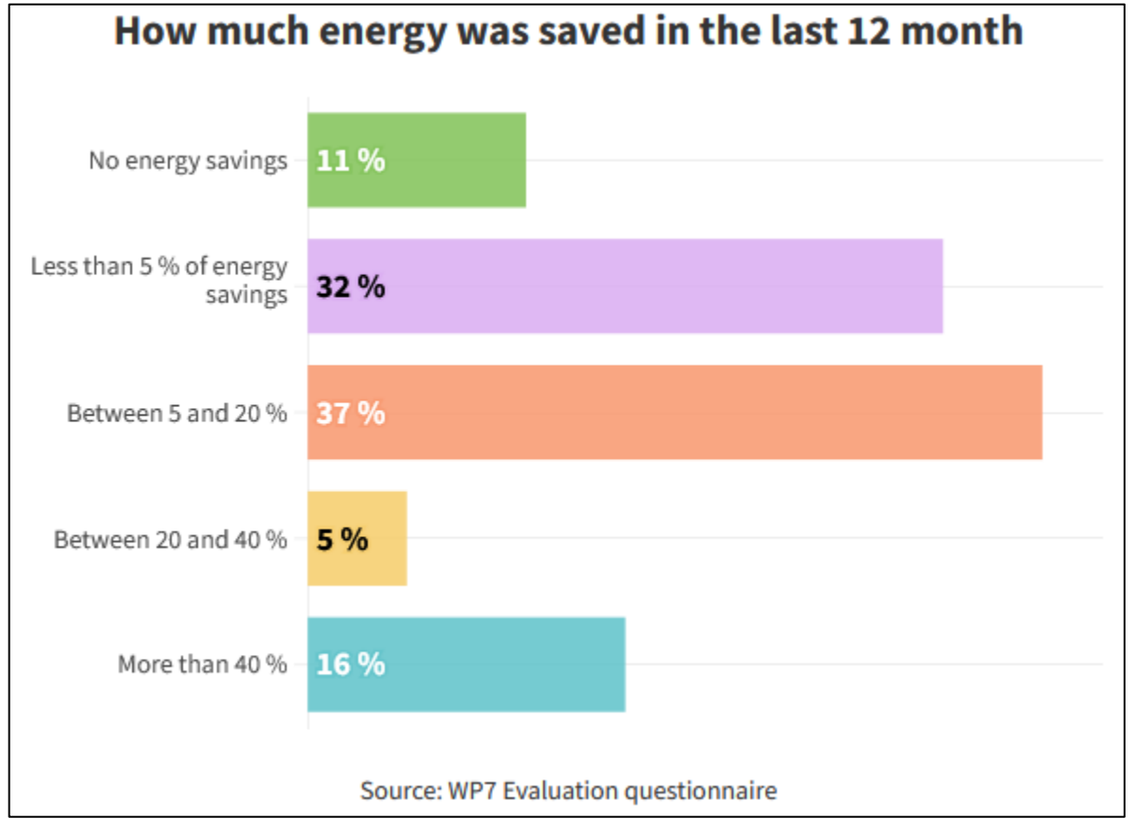
6.4. Investment in Renewable Energies – energy savings

The results indicate that energy savings over the last 12 months were **mostly moderate rather than dramatic**.

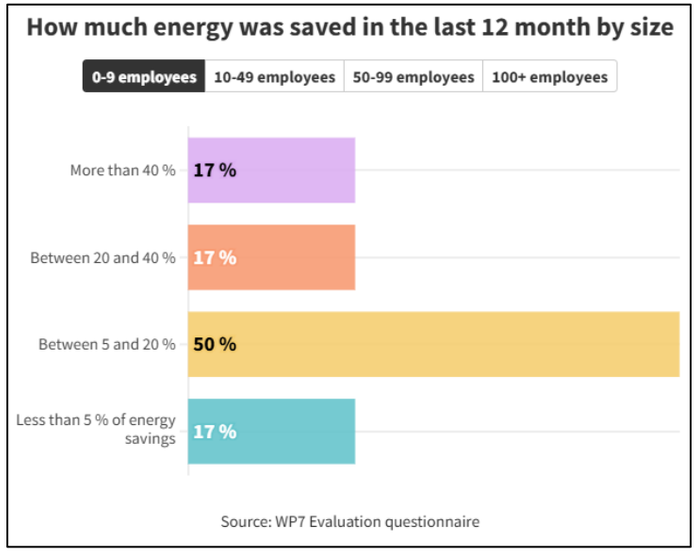
The largest share of companies report **5–20% savings** (37%), followed closely by **less than 5%** (32%), meaning that nearly **7 in 10 achieved only limited-to-moderate reductions**.

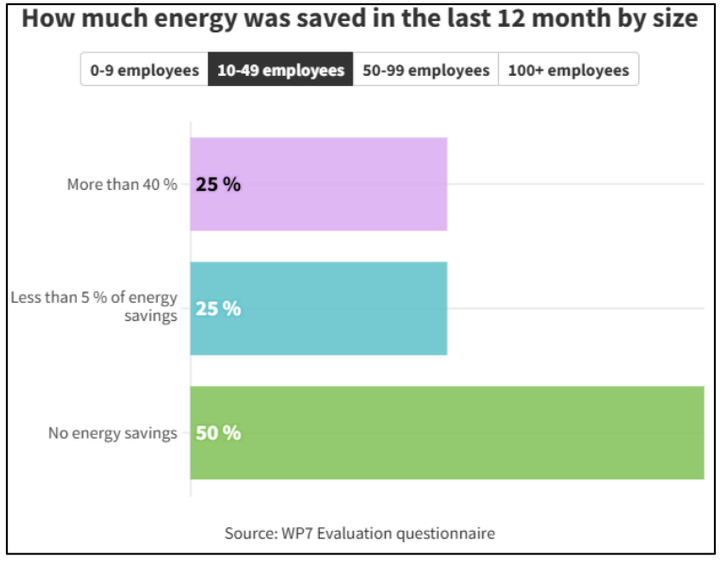
A smaller group reports very strong savings (>40%) at 16%, while 20–40% savings is relatively rare (5%).

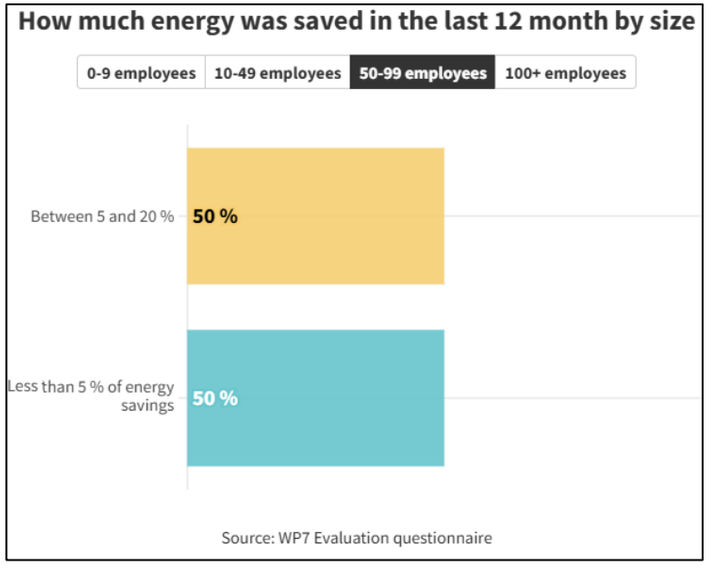
Finally, 11% report no energy savings, showing that a minority did not see measurable improvements despite the period assessed.

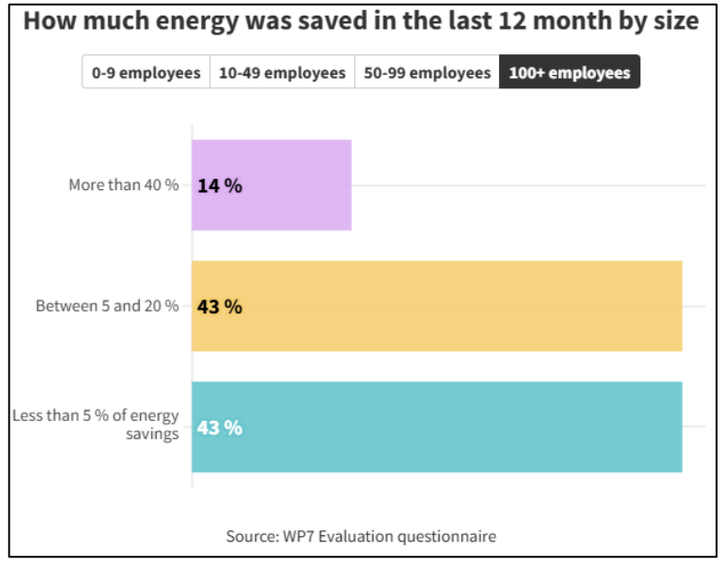


6.4. Investment in Renewable Energies – energy savings by company size









Across breakdown by **company size**, the only clear "no savings" signal is concentrated in the 10–49 employee group, while the other sizes mostly report some level of savings (again mainly below 20%).

By area, larger sites (>5 000 m² and 1 001–5 000 m²) still tend to cluster in <20% savings, and the instances of **>40% savings** occur in smaller area bands but are driven by **single observations**.

Overall, these patterns suggest **incremental savings are more common than large gains**, and the segment differences should be treated cautiously due **to small counts per category**.

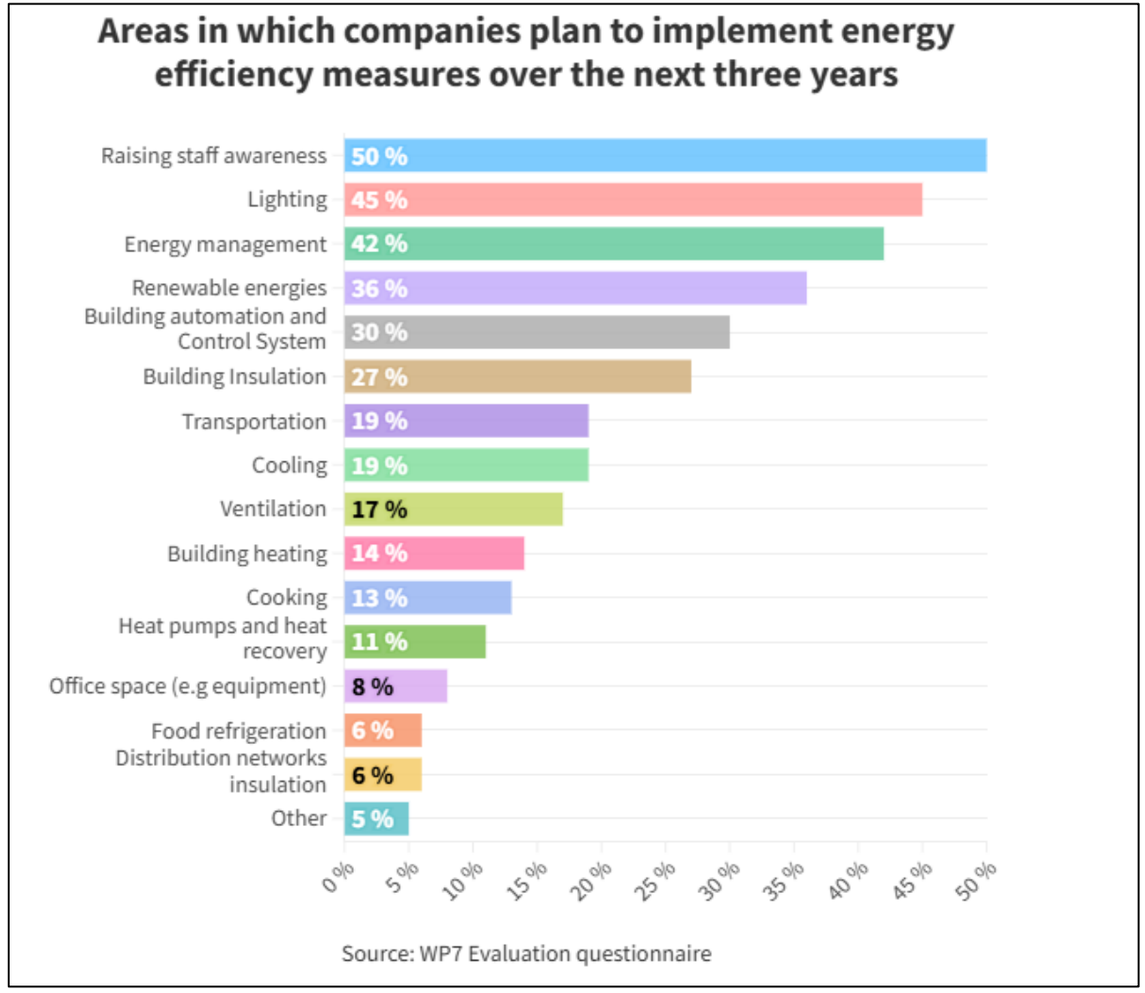
7.1 Action plan – Fields of upcoming energy efficiency measures

The data shows the areas where companies intend to take energy efficiency measures. The most common focus is **Raising staff awareness**, reported by 50% of companies. This is followed closely by **Lighting** improvements (45%) and **Energy management** initiatives (42%).

Companies also plan to invest in **Renewable energies** (36%) and **Building automation and control systems** (30%), as well as **Building insulation** (27%).

Less frequently targeted areas include **Cooling** and **Transportation** (both 19%), **Ventilation** (17%), and **Building heating** (14%).
Measures in cooking (13%), heat pumps and heat recovery (11%), office equipment (8%), distribution network insulation (6%), and food refrigeration (6%) are less common. Only 5% of companies indicated other types of measures.

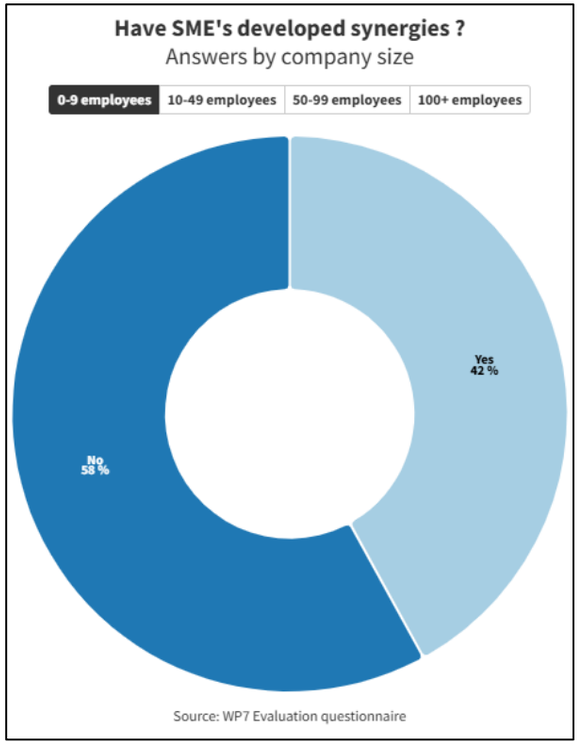
Overall, the data suggests that companies prioritize measures with direct impact on operational efficiency and staff engagement, while more specialized or technical measures are less widely adopted.

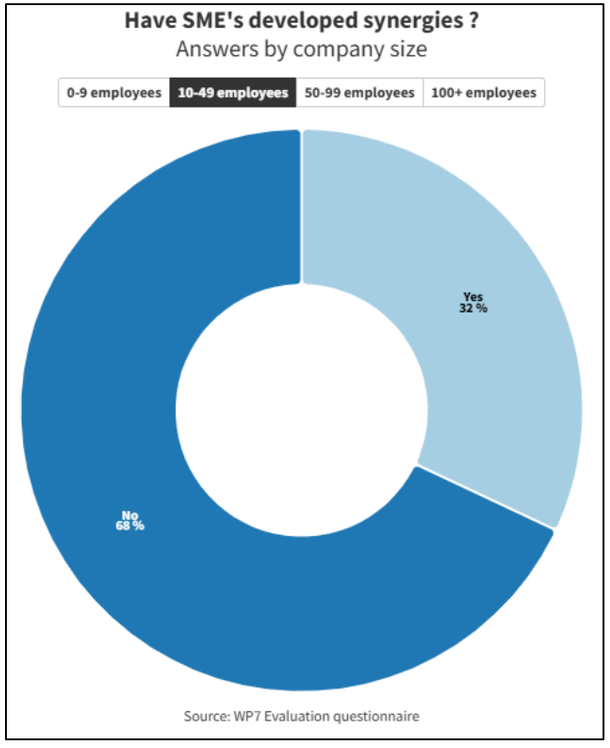


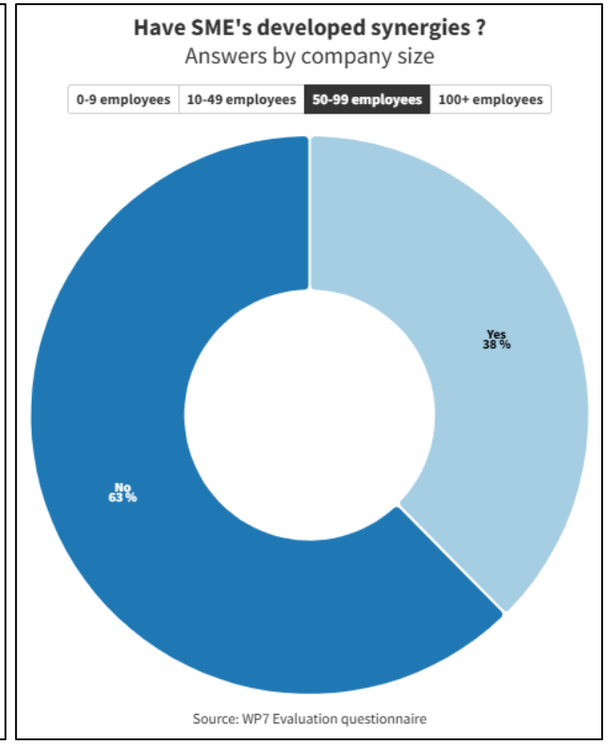
7. Action plan – Synergies between SMEs

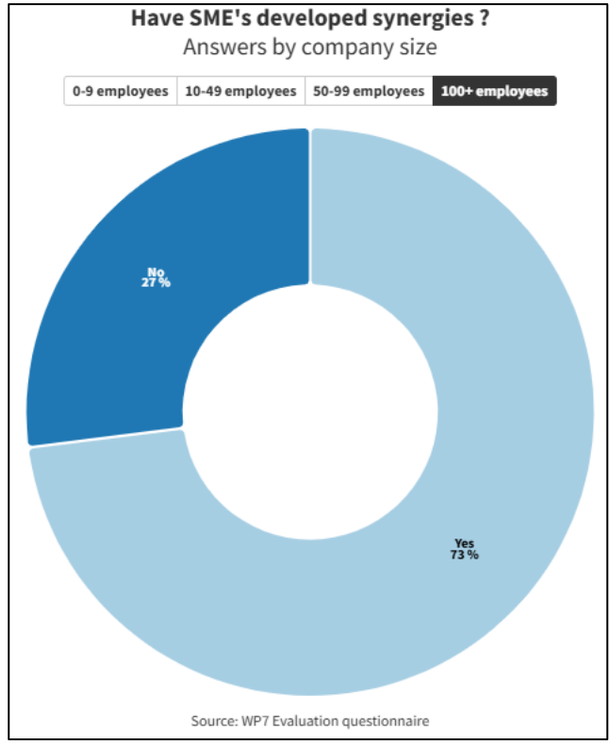
Overall, **the development of partnerships/synergies is mixed and clearly depends on company size, while site area shows a weaker pattern.**

By company size, larger firms are much more likely to report having developed partner synergies: 100+ employees: 73% yes (8/11). In contrast, smaller and mid-sized companies mostly report no—0–9 employees: 42% yes (13/31), 10–49 employees: 32% yes (10/31), and 50–99 employees: 38% yes (3/8)—**suggesting that partnership building may require resources, networks, or strategic capacity more common in larger organizations.**









WP7 – Conclusion

The WP7 evaluation focuses on enhancing energy efficiency in SMEs to support sustainability goals. It highlights the key barriers to implementing energy-saving measures, such as limited access to funding, time constraints, and lack of expertise, especially for smaller companies. The findings indicate that while larger firms are more likely to invest in energy-efficient technologies, many SMEs adopt simple and cost-effective measures like improving lighting and raising staff awareness. The report emphasizes the importance of leveraging partnerships and synergies to scale up these initiatives. Data collection from 84 companies, along with an action plan, indicates a growing trend towards energy management systems, renewable energy investments, and increased staff engagement in energy savings.