



C.2 Supporting SMEs in their needs

Short description	Activities for supporting SMEs are a core part of running the local SME energy collective. You support the SMEs in their various needs related to energy efficiency, energy management and implementation of energy projects by offering relevant activities targeted at those needs.
Tools provided	Examples of agendas and content/topics for meetings (Appendix C.1)

The services and activities that you organize are all aimed at supporting SMEs to improve their energy efficiency. To improve the energy efficiency, multiple needs have been identified which the local SME energy collective could fulfill (see **Table 1** for an overview). Some of these needs relate specifically to the identification and implementation of energy efficiency measures, others are more related to generic needs that motivate SMEs to pay attention to energy efficiency. In Chapter E, all the needs are explained in more detail.

In the following sections, we discuss how a local SME energy collective can fulfill these various needs. Section C.2.1 explains how SMEs can be supported in their motivational and knowledge building needs. Sections C.2.2 and C.2.3 explain how SMEs can be supported in their needs with regards to the process of implementing energy efficiency measures. These measures can be implemented in two ways:

As **individual** actions – this is the more traditional way of implementing energy efficiency measures and other energy projects, which means each SME operates separately in identifying and realizing the measures. As a local SME energy collective, you can support the SMEs by standardizing certain aspects or providing trustworthy information, so it saves the SMEs time and resources to go through this process.

- As **collective** projects – this entails that two or more SMEs work together in a joint effort of identifying and realizing energy projects. This way of working is often new for SMEs. As the Trusted Partner, you can guide them in this process and support them in specific ways in the process to unlock additional energy saving potential, or to make a given idea more convenient.

The SME needs are similar for both these types of energy projects. However, there are some differences in how you can support them. Therefore, they are explained in two separate sections: C.2.2 (individual implementation) and C.2.2 (collective projects).



Table 1. Areas in which SMEs may need support related to energy efficiency improvements. (These needs and related tools that can be used are described in more detail in Chapter E).

SME needs	Category	Further guidance
E.1 Knowledge building on energy efficiency and energy management	Motivational and knowledge building needs	0
E.2 Estimation of energy consumption and its impact	Identification and implementation of energy efficiency measures	C.2.2 and C.2.3
E. 3 Identification of potential solutions to reduce the energy consumption	Identification and implementation of energy efficiency measures	C.2.2 and C.2.3
E.4 Investigation of other potential benefits	Identification and implementation of energy efficiency measures	C.2.2 and C.2.3
E.5 Find the right supplier	Identification and implementation of energy efficiency measures	C.2.2 and C.2.3
E.6 Search for public support and funding	Identification and implementation of energy efficiency measures	C.2.2 and C.2.3
E.7 Search for financial options	Identification and implementation of energy efficiency measures	C.2.2 and C.2.3
E.8 Management of energy efficiency projects	Identification and implementation of energy efficiency measures	C.2.2 and C.2.3
E.9 Assistance with complying to energy regulations	Motivational and knowledge building needs	0
E.10 Spread the “energy efficiency culture” in the company	Motivational and knowledge building needs	0
E.11 Setting up a long-term energy efficiency strategy in the company	Motivational and knowledge building needs	0
E.12 Developing a systematic energy efficiency work	Motivational and knowledge building needs	C.2.1
E.13 Monitoring the energy consumption and calculate the savings	Identification and implementation of energy efficiency measures	C.2.2 and C.2.3



C.2.1 Support with motivational and knowledge building needs

This section explains how you can support SMEs in their motivational and knowledge building needs. The needs that have been identified and that this support addresses are primarily:

- Knowledge building on energy efficiency and energy management (see Section E.1).
- Assistance with complying to energy regulations (see Section E.9).
- Spread the “energy efficiency culture” in the company (see Section E.10).
- Setting up a long-term energy strategy and systematic energy management (see Section E.11 and E.12).

The first two needs relate to the SMEs’ motivation to look into the subject of energy efficiency. The latter two relate to the integration of energy efficiency in the day-to-day business of the SMEs. Fulfilling those needs within a local SME energy collective could encourage, SMEs to become more interested in implementing energy efficiency measures and to putting energy efficiency (high) on the agenda.

There are various activities you can undertake to support the SMEs with these motivational and long-term energy management needs. As your contacts in the supply side have substantial relevant knowledge, it is advised to actively involve them in these activities (see also Section C.1.3). These activities may be systematically supported through structured planning and implementation of [regular networking events](#), which can consist of a combination of (see also [Appendix C.1](#) for suggested agendas and topics for such events):

- **Organized meetings:** You can support the SMEs by offering meetings and other arenas where they can exchange knowledge and learn from each other’s experiences. Especially when it comes to knowledge building and increased adoption of energy management practices, sharing experiences and good examples with other companies has been shown to be a successful approach. For example, it can showcase multiple benefits, such as new business contacts, and better communication within the company. Base discussions on the results and outcomes of other activities in the collective (e.g. energy scans and measures, setting energy targets, or collective projects).
- **Training seminars and workshops:** You can support the SMEs to learn more about energy management, energy labels, multiple benefits, energy regulations, monitoring, financing opportunities, sustainable decision making – including how to use selected tools targeted to the SMEs. Training can be directed towards energy managers, employees or management depending on the topic. You can organize this kind of training yourself, but you could also collaborate with other Trusted Partners and the Multiplier Organization to set up (national) activities.



- **Study visits:** You can organize study visits at SMEs within the collective or at other relevant companies or sites. In this way, they can gather practical and concrete examples of how companies have implemented energy efficiency measures or other energy solutions. Company visits stimulate knowledge exchange between the SMEs and peer learning.

You can strengthen knowledge building by providing follow-up material and information after the events and visits, and through your recurring communication with the SMEs between events. As noted before, to keep the SMEs motivated and to build knowledge frequent contacts and repetition is key.

In all events and regular communication with the SMEs, you can also support them in developing their knowledge further by:

- **Linking the events and communication to your activities aiming more directly at implementation of energy efficiency measures.** For instance, the results from energy scans and energy audits of the individual SMEs are a natural starting point for discussions, planning of content and development of common goals. Linking to **energy management practices** can also provide a structure and lead to other benefits, such as more systematic work in other areas.
- **Factual information, good examples and useful tools** (e.g. through the 'Energy Efficient SME' portal): There is a lot of information on the internet. However, it is not always clear what information is correct and which tools are appropriate to fulfill a certain task. By referring to the trustworthy information on the 'Energy Efficient SME' portal, you make sure your SMEs are correctly informed.

C.2.2 Supporting the individual implementation of energy efficiency measures

An integrated part of running an energy collective is to provide support to the individual SMEs who want to improve their energy efficiency. Many of the SME needs presented in **Table 1** can be linked to a standard process of identification, evaluation and implementation of energy efficiency measures (or other types of energy projects). This process, and the related SME needs, are described in the table below¹.

¹ This process is adapted from TNO and CCS (2018)



Process step	SME need (See Chapter E)
A. Assessment of potential energy savings and measures	Estimation of energy consumption and its impact
	Identification of potential solutions to reduce the energy consumption
	Investigation of other potential benefits
B. Creation of an energy action plan	Management of energy efficiency projects
	Search for public support and funding
	Search for financial options
C. Finding a competent Energy Service Supplier	Find the right supplier
D. Signing contracts	(Not described in Chapter E.)
E. Monitor the outcome and follow up on results	Monitoring the energy consumption to calculate achieved savings

By coordinating activities related to this process among several SMEs, you and the local SME energy collective can save time and resources, since the SMEs do not have to figure out the whole process by themselves. Coordination can be to offer the same type of support, through the same channels to all SMEs. Activities to think of are providing standardized contracts, trustworthy information on Energy Service Suppliers, arranging workshops on how to use specific tools, or even to contract the same energy auditor or energy consultant for all the SMEs.

The following points explain activities you could provide to support the SMEs in this process. (The SME needs and approaches and available tools to cater for these needs are described in detail in [Section E.](#))

Step A: Assessment of potential energy savings and measures.

As a first step, you, as a Trusted Partner, can play an important role by, for example, [helping SMEs fill out a simple tool](#) for mapping of their energy use, or to [find a suitable energy auditor](#) to carry out a more detailed energy audit (see also Section E.2). Next to solutions provided by energy audits or scans, you can also support the SMEs by [providing trustworthy information from databases of best practices](#), where the SMEs can get an overview of available solutions. Lastly, you can provide support to the SMEs on how they can evaluate and decide on viable energy efficiency measure(s) or renewable energy project(s).



For example, you can [provide tools](#) for economic evaluation of measures, templates for business case evaluation that provide a clear overview of benefits (and costs) of all solutions. You may also want to include the evaluation of energy efficiency measures as a topic for [workshops and network meetings](#), where you could train the SMEs in a multiple benefits approach and investment evaluation methods, and discuss selection criteria for measures (see also above and Section E.4).

Step B: Creation of an energy action plan.

Once the SME has decided to take action and to invest in an energy efficiency measure, an action plan is important for the SME to know what to do next. Also in this step, you can help the SMEs with [access to tools and guidance on how to use them](#). Examples can be templates for energy action plans (see e.g. Appendix E.1), checklists for presenting proposed measures to company management and simple calculation tools to support them in their planning and implementation of measures (see Section E.8). Examples of other relevant support you can provide are:

- [Basic business cases](#) for various energy efficiency measures that can be adapted to the situation of the SME,
- [Information on various financing options](#) (see Section E.7) and
- [Guidance to public funding](#) and how to apply for that (see also Section E.6).

Step C: Finding a competent Energy Service Supplier.

If an Energy Service Supplier is needed for implementation and/or for providing necessary equipment you can provide support in various ways, for example:

- By [creating an overview of suppliers](#) that have proven to be competent in previous projects;
- By [providing a checklist](#) for SMEs that they can use to assess the Energy Service Supplier;
- By [arranging standardized 'packages of energy efficiency measures'](#) which they can individually purchase from a selected Energy Service Supplier. See also Section E.5.

Notably, not all energy efficiency measures require the involvement of Energy Service or Equipment Suppliers. For example, measures relating to changes in routines or behaviour are typically implemented by the SMEs themselves.

Step D: Signing contracts.

After an Energy Service Supplier is found, an agreement needs to be reached between relevant parties, and the corresponding contracts need to be signed. You can support the SMEs, for example, by providing [Templates of standard contracts](#) and [Practical guidelines](#) on how to draft such agreements.



Step E: Monitor the outcome and follow up on results.

Having clear and fact-based evidence of the positive impact of energy-efficiency measures is the key to bringing SMEs to keep investing in them. But the process of effectively monitoring these benefits is not trivial. You can help the SMEs drafting a strategy for how to follow-up the results and achieved savings of implemented measures. One way to do this is to include monitoring, selection of key performance indicators and sub-metering strategies as topics for [lectures and discussions](#) in network meetings and seminars. It may also be possible to [define common key performance indices and calculation methods](#) for the collective which are useful for the individual SMEs as well as for the local SME energy collective as a whole. See also Section E.13.

C.2.3 Supporting the implementation of collective energy projects

While you, as a Trusted Partner, can provide a wide range of support activities to the individual SMEs who participate in the energy collective, there may be a potential in also taking [collective actions](#). Collective actions are actions/projects towards energy efficiency or renewable energy where two or more SMEs work together in a joint project, which allows unlocking additional potential or benefits, or making a given idea more convenient or cost-effective to implement.

Undertaking the action together can improve the potentials and cost-effectiveness compared to working individually. A few benefits that can be mentioned are:

- “Group discounts”: bundle purchases can be cheaper than individual ones. This might be true both for products (e.g. PV panels) or services (e.g. energy audits)
- Industrial symbiosis: some advantages might only be achieved by acting collectively. An SME might have waste process heat available, while neighboring SMEs have high heating demands.
- Teamwork: Acting collectively might mean saving time and resources. Also, having someone else “checking” on the different choices might avoid common pitfalls.



Example: Renewable energy community in Italy

Italian legislation currently allows companies connected to the same electric MV/LV transformer to constitute a renewable energy community, and hence to share the renewable energy generated and the electric energy demand. This facilitates access to public support and a more favorable price for the renewable energy generated locally and exchanged with the grid with a net-metering approach. The Trusted Partner could map the SMEs in the collective with respect to their solar energy generation and grid connections, and approach groups of 2-4 SMEs connected to the same LV/MV transformer providing an initial economic evaluation of the project.

Example: Collective purchase of energy audits

In recently established energy collective it might be difficult to motivate SMEs to undertake advanced energy projects. Collective purchase of energy audits can be a low-hanging fruit: the Trusted Partner first approaches an energy auditor, and negotiates a premium price for a bundle of energy audits to be performed in the collective. The Trusted Partner then approaches the most motivated SMEs in the collective and offers them the possibility of joining together in a collective purchase.

Most of the activities required to support collective actions overlap with those suggested to support the process for individual measures. Groups of SMEs undertaking collective energy actions will need support to identify the right supplier, to find financing, to follow up the project, etc. in similar ways as for individual actions. However, organizing a collective energy project will require a few additional actions. The process for collective energy projects is described in the table below². For each step, the following paragraphs describe how you can support SMEs. All the support described in Section C.2.2 are also relevant for collective actions, and the following paragraphs focus on the **additional support that is needed for collective actions**.

² This process is adapted from TNO and CCS (2018)



Process step	SME need (See Chapter E)
A. Arranging an Energy Team & project leader	/
B. Assessment of potential energy savings	Estimation of energy consumption and its impact
	Identification of potential solutions to reduce the energy consumption
	Investigation of other potential benefits
C. Creation of an energy project plan	Management of energy efficiency projects
	Search for public support and funding
	Search for financial options
D. Commitment of essential SMEs	/
E. Finding a competent Energy Service Supplier	Find the right supplier
F. Signing contracts	/
G. Realization & maintenance	/

It is important to note that collective projects can be initiated in various ways. The process below describes the process where you, as the Trusted Partner, initiates the collective action. In some cases, often in energy collectives that are in an advanced stage, a group of SMEs might approach you with an idea in mind. In this case, the first few steps of the process might already be completed by the SMEs, and you can start later in the process.

Step A: Arranging an Energy Team & project leader

Going through the process of collective action requires time and resources. By arranging an [Energy Team](#) this effort can be distributed over multiple SMEs. This Energy Team can help you as the Trusted Partner in the process, or it might even function without your active support if the SMEs are very motivated. By setting up an Energy Team, you create ownership at the SMEs and get them committed to this collective action.

The Energy Team should be managed by a project leader. You, as the Trusted Partner, could take this role as you already know a large part of the entrepreneurs on the business park or industrial area and know the process of collective energy actions. By taking up the task of project leader, you can provide the SMEs with support that is specific to the organization of collective energy projects:

- [Dealing with the bureaucratic aspects of working with a collective approach:](#) Most actions that are done at a collective level might require additional support in



relation to bureaucracy. How do you sign contracts involving more than one company? How do you make use of state/public incentives when making collective purchases? And how is the split among the team partners? You could facilitate these processes, and thereby, help to avoid projects being stranded.

- **Team management:** Many small companies might have little experience with collaborative projects with other companies and with obstacles to teamwork. You can provide support in making the work of the team more fluid, making sure that the work is moving forward, checking regularly on individual SMEs for any sign of disengagement, and, in case, helping by organizing regular meetings to ensure the correct development of the project.
- **Conflict resolution:** Any team can get into conflicts, and this is true also for teams of SMEs dealing with collective energy projects. Many reasons can lead to a team becoming dysfunctional. This can become a threat to the correct development of the collective energy project. You could help by monitoring the state of the team, participating regularly in team meetings, and acting as an in-between when conflicts arise.

Step B: Assessment of potential energy savings

Similar as in the individual implementation of energy projects, this process starts with identifying potential energy savings and spotting opportunities and key points of attention. To identify the opportunities for energy savings in a collective action, two approaches can be used:

- Basing the identification of potential projects on the results of individual energy scans/audits at SMEs, in which recommendations can be compared to see if there are potential solutions for which the forces can be joined.
- Conducting an energy scan for the whole business area, such as the Energy Potential Scan³. By conducting an energy scan for the whole business area, different solutions might be possible to identify than for the case in which only individual energy scans are conducted. A heat network is an example of such a solution.

The support you provide to the Energy Team can be similar to the support provided for the individual implementation of energy efficiency measures (see Section C.2.2). In addition, you can provide information on collective solutions by including best practices of collective actions.

³ See e.g. the tool “Energy Potential Scan for Business Parks” in the list of tools in Appendix E.2.



Step C: Creation of an energy project plan

After potential energy efficiency measures or renewable energy projects have been identified, an energy project plan should be developed. For each of the measures (if more than one), the plan describes how it will be realized and explains what steps will be undertaken for realization (by when) and who is responsible for these steps.

Depending on the revenue streams of the local SME energy collective, the first step might be to arrange pre-financing, which can be used to cover the costs for the creation of the energy plan. For some energy collectives the pre-financing is included in the revenue streams. For others, potential investors (financial institutions, SMEs or the municipality) should be approached in order to finance the preparations of the energy project implementation.

Similar with the individual implementation, the plan should also include a business case of the energy project. Depending on the characteristics of the collective action, the energy plan might be more complex. For example, the business case of a collective action to bundle the purchases of PV panels is similar to the individual business case of the PV panel. However, investing in a heat network for the business area requires a joint investment, making the business case more complex.

The support you can offer the Energy Team is similar to the support of individual measures (see Section C.2.2). The difference is that you need to adapt the standard business cases and templates for the action plans to suit joint actions.

Step D: Commitment of essential SMEs

The energy project plan from the previous step can be used to explain the idea to other SMEs in the local SME energy collective and to stimulate them to join the collective action. Some collective energy projects only have a positive business case if a certain number of SMEs support the energy project. For those projects, it is essential to have commitment from enough SMEs in order to move forward to the next step.

For certain collective energy projects, it could be beneficial to conduct additional energy scans and audits at SMEs. These audits could show the benefit of implementing the energy efficiency measure at the SMEs, which could create more support for the energy plan.

As a Trusted Partner, you generally have good relationships with the SMEs in the local SME energy collective and a good view of their preferences and needs. You can support the Energy Team in finding the right communication methods and arguments (on multiple benefits) that suit the essential SMEs. You can also help the Energy Team in the promotion of the energy plan, by approaching SMEs, or organizing events where the energy plan can be presented (see also Section C.1.1)



Step E: Finding a competent Energy Service Supplier

If a sufficient number of SMEs supports the energy project, a competent Energy Service Supplier needs to be found to implement the energy project. Here, your role is similar as for individual measures. Once the Energy Team has selected a supplier (and possibly also investors) for the project, it is necessary to create project and investment plans for the collective energy project on an SME specific level, as each SME needs to make a decision on joining the energy project or not., You can support the process by elaborating an offer for each participating SME in the collective energy project with the selected supplier and investor.

Step F: Signing contracts

To finalize the agreement, contracts need to be signed between the SMEs, the investor and supplier. The Energy Team, together with the Trusted Partner, supports the SMEs by drafting the contracts, and explaining them to the participating SMEs. There are two ways to construct the contracts:

- The local SME energy collective, as one legal entity, will sign the required contract(s) with the supplier and/or investor for the energy project. Additionally, each participating SMEs will sign a contract with the local SME energy collective. This method can only be applied if the local SME energy collective is a legal entity (see also Section B.5.4).
- Each SME will enter into a contract separately, meaning that each SME will need to sign an individual contract with the supplier and/or the investor.

Step G: Realization & maintenance

After the contracts are signed, the Energy Team makes sure the agreements are fulfilled and that the energy projects are realized. This involves giving orders to the suppliers, monitoring the process and providing support and explanation to the participating SMEs. Depending on the role division within the Energy Team, you could have an active role in this step as a Trusted Partner.



APPENDIX C.1: Examples of agendas and content/topics for meetings and networking events

General meeting agenda

Below is an example agenda for a full-day meeting hosted by one of the SMEs in the collective. Most meetings will probably not be full-day meetings. For shorter meetings you would choose to focus on one theme or a more limited aspect. However, try to always include both informational (e.g. presentation by energy expert) and networking (e.g. discussion, exchange of experience) elements. Preferably, they can both relate to a common theme.

Locating the meeting at one of the participating companies that host the meeting and provide a study visit makes the discussions more concrete, increase interaction and the direct involvement of the SMEs. However, in many cases this is not possible – due to the type and size of SMEs involved and their willingness to do this. Then an option is to still include company presentations or concrete examples from participating companies in the agenda.

For digital meetings, the same overall structure is recommended. However, in these cases it takes even more dedication and planning to create interactivity during the meeting.

- Introduction
- Presentation of host company
- At least one networking element, such as a structured discussion for exchange of experiences within a specific area or related to a specific issue (see topic list below)
- One or two informational or training elements (e.g. related to a technology area, or methodology – see theme list below) with lecture/presentation and questions/discussions – e.g. one in the morning and one in the afternoon
- Study visit to see the operations and activities of the host company (ca 1 hour)
- Ample time for lunch and coffee breaks (to create good conditions for further networking)

To further involve SMEs and keep up their motivation, it can be a good idea to include specific points for each SME to report tasks or status updates in the meeting agenda. E.g: - SME A: status, needs, - SME B: status, needs etc. By doing that all the SMEs in the network know that they will be asked to contribute to the meeting.



Meeting invitations

- Information about place and time – possibly with directions
- Agenda and potential background material on specific content
- Information about the theme of the meeting and clarification if the meeting is relevant to attend for someone other than the main contact person at the SME (persons responsible for energy management, finances, or ventilation system)
- Information about when and how to confirm participation – if needed.

Example content for first meeting(s)

The first meeting(s) for the SMEs in the collective serve to introduce the initiative to the SMEs and to further motivate them to participate. Therefore, the content will need to be adapted to specific goals and conditions.

The list presents a number of possible topics that may be more or less relevant depending on the impact ambition and value proposition of your own local SME energy collective. Let it serve as inspiration and select those most relevant.

- Presentations of participating SMEs
- Introduction of the initiative, e.g.
 - its impact ambition and value proposition (depending on how far these have been developed)
 - the core principles of the collective approach you will be taking and your own role (as Trusted Partner) – by relating more or less explicitly to the GEAR@SME methodology, depending on situation.
- Good, inspiring examples of energy efficiency and its multiple benefits in SMEs
- Available services/activities/support, e.g.
 - Available support for financing energy audits
 - How the Trusted Partner can support applying for subsidies, performing simplified energy scans, and/or purchasing audits/contracting auditors
- Discussion activity on needs and expectations of participating in the local SME energy collective
- Potential surveys – explanations and time for filling these out

Examples of informational themes for one or several meetings (a non-exhaustive list)

For presentations or training sessions on these informational themes, you can involve representatives in your network. An energy advisor, energy auditor, equipment provider, the energy company or someone from a university can be invited to hold a presentation.

- Energy audits – purpose, ambition levels, procedures, concrete examples
- Common energy efficiency measures and their (multiple) benefits – best practices



- Setting energy targets for energy efficiency and creating an action plan for implementation of measures
- Evaluating and prioritizing energy efficiency measures based on their multiple benefits and estimated profitability
- Energy monitoring – synergies with energy audits, follow-up and evaluation of implemented measures
- Specific technology areas – e.g. compressed air systems, heat recovery, ventilation systems, lighting, electric motors (pumps and compressors), cooling systems, transport and logistics
- Energy efficiency through changed behaviour, routines and engaged employees
- Working systematically with energy efficiency – Basic principles of energy management
- Financing possibilities for energy audits and energy measures
- Policy developments relevant to the energy area and to the SMEs of the collective

Examples of discussion topics for meetings (a non-exhaustive list)

- Potentials and ambitions – to agree on a common target for the collective (when possible, based on results from energy scans and audits of the companies)
- Drivers and values of the SMEs – why they are participating in the collective and what they benefits they expect to achieve
- Discussions of the SMEs own experience from any of the informational themes listed above.
- Focus areas and common challenges – to guide the services and activities that should be included in the collective and the content of coming meetings
- Results from energy efficiency measures taken and from overall monitoring of the result of the energy collective