



BALANCE
green and stable

Green and stable SMEs

Needs analysis survey

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NATIONAL REPORT

Online surveys to SME's decision takers

Introduction

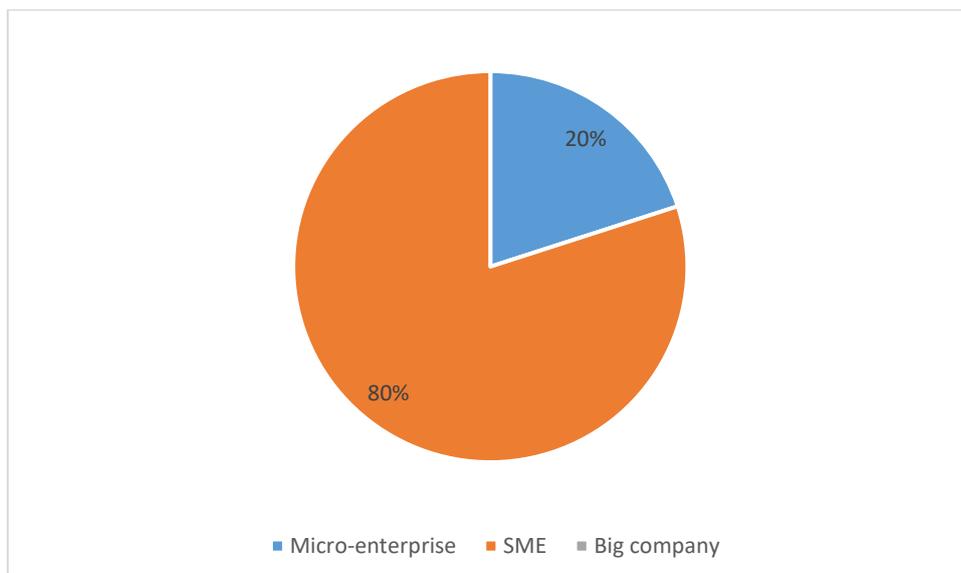
We have shared the online survey with 461 SME's decision takers. We have received 20 answers in total in order to gather information regarding their business's needs, the level of readiness for change management, the level of awareness on green policies and their level of green transition.

Analysis of the survey

SECTION 1: INFORMATION ABOUT SME'S

1. What is the size of your organisation?

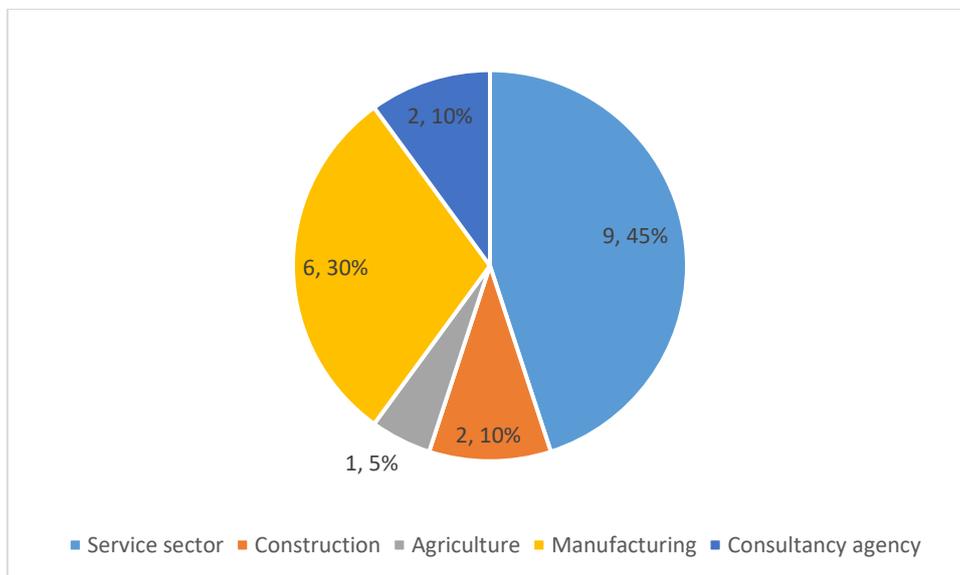
Graph 1



- Out of the 20 participants of the survey 4 (20%) work in a Micro-enterprise, 16 (80%) in a SME and none of them work in a big company. In the Basque Country, 99,85% of the companies are SME's according to the Ministry of Industry.

2. Which sector does your organisation belong to?

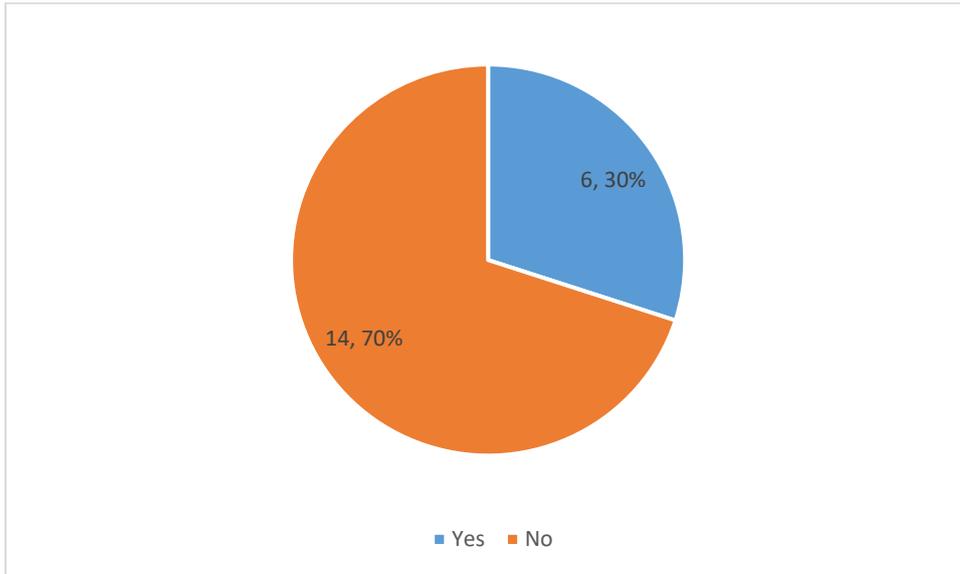
Graph 2



- The organisations that responded to the survey belong to a variety of sectors. 9 belong to the service sector with a 45%. Other sectors include construction (10%), Conultancy agencies (10%), manufacturing (30%) and agriculture with a 5%.

SECTION 2: AWARENESS RELATED TO GREEN ECONOMY

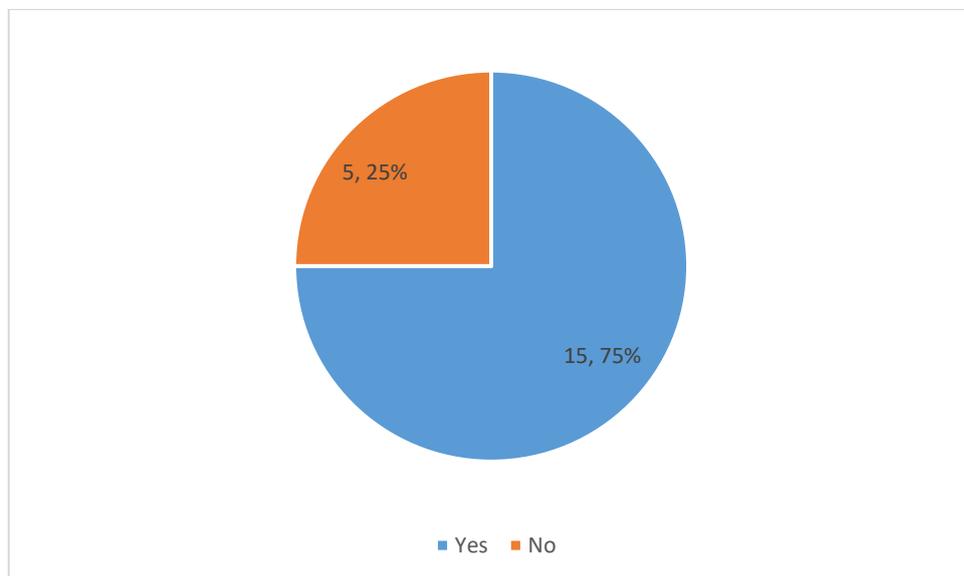
3. Are you aware that Europe aims to be a climate-neutral continent by 2050?



Graph 3

- According to Graph 3, 70% (14) of the respondents are aware that Europe aims to become a climate neutral continent by 2050. This is quite a low percentage taking into account the importance of this objective.

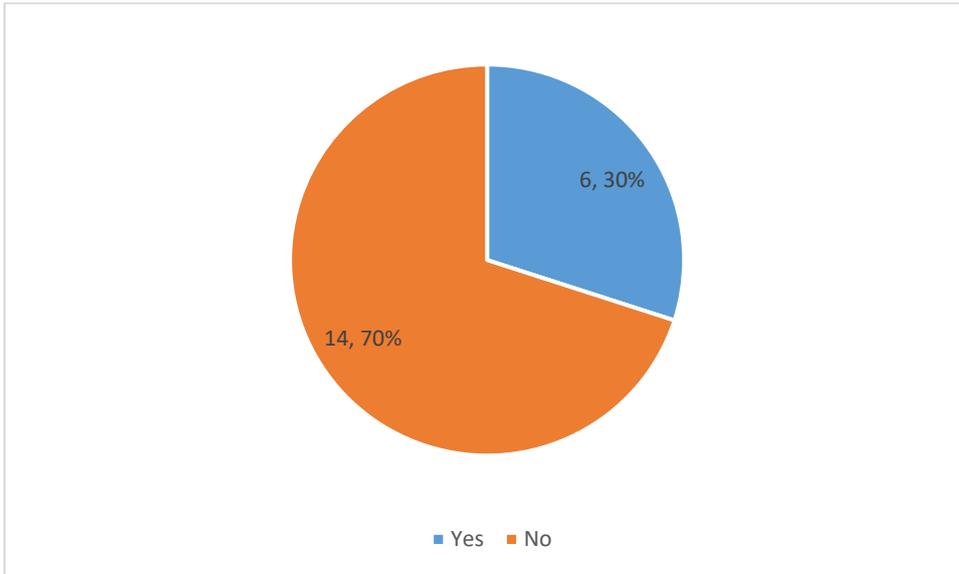
4. Are you aware of the green policies in your country?



Graph 4

- Graph 4 shows that 75% (15) of the respondents are familiar with the green policies in Spain.

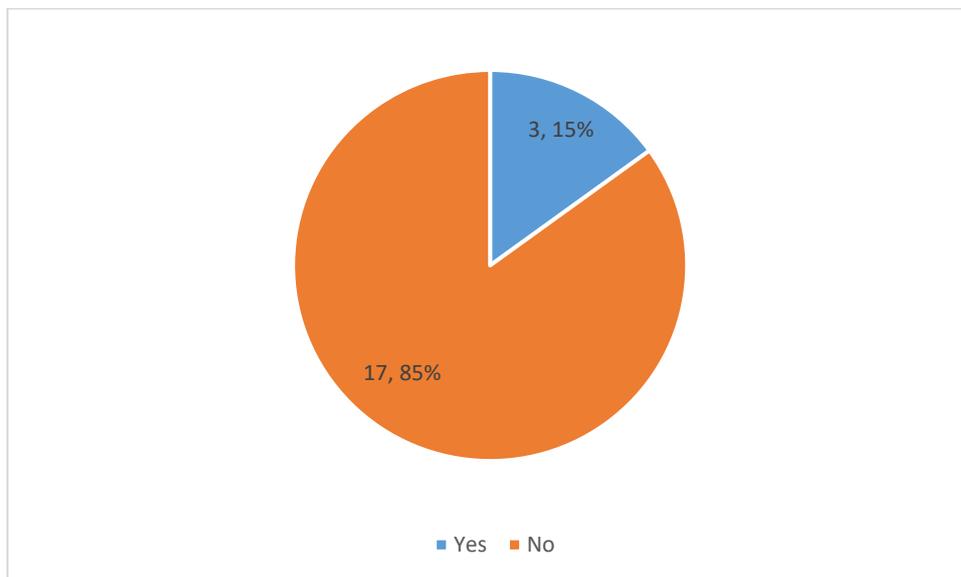
5. Do you know about the existing financial environmental aids in your country?



Graph 5

- Graph 5 shows that a big portion of the respondents (70%) is not aware of the existing financial environmental aids in Spain. This underlines the importance of raising awareness and helping SME's to transform their activities into greener operations.

6. Do you think you need more information related to green policies?



Graph 6

- 85% of the respondents expressed that they need more information related to green policies.

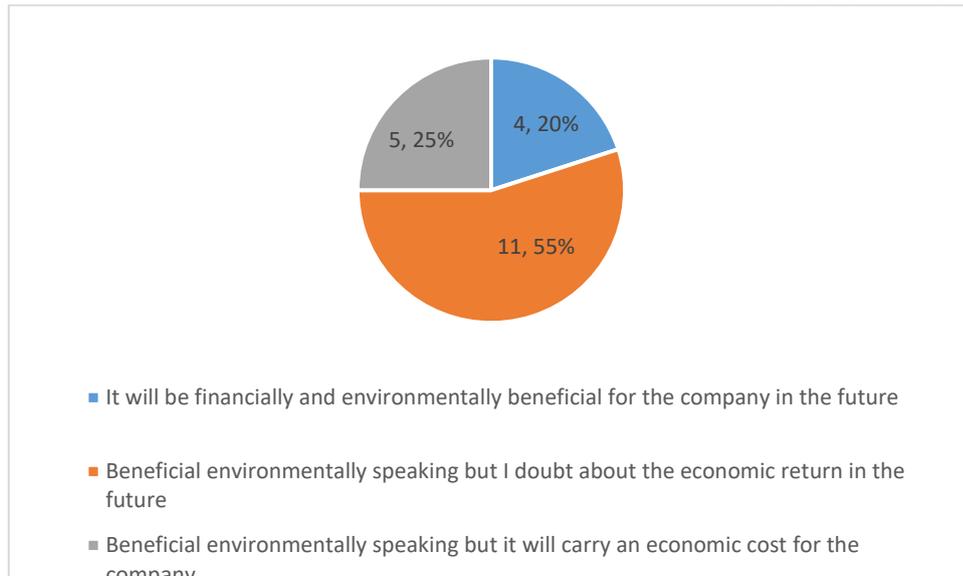
SECTION 2: AWARENESS RELATED TO GREEN ECONOMY

6.1. Which sources you use to get the information on funding opportunities:

- No answers

This answer shows that there is a lack of knowledge from companies about funding opportunities.

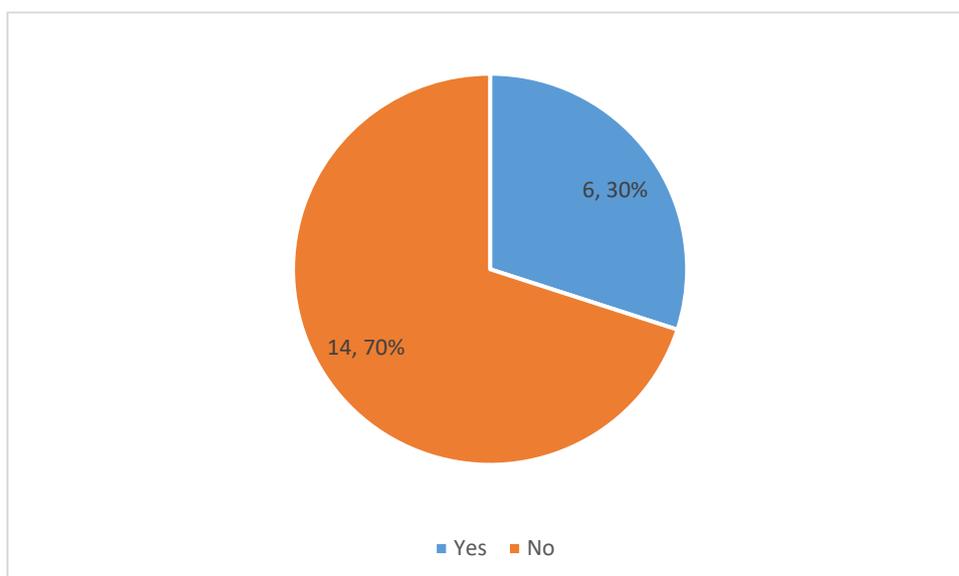
7. What do you think about implementing green measures in your company?



Graph 7

- According to Graph 7, 20% of the respondents think that implementing green measures in their company would be financially and environmentally beneficial for their company in the future. On the other hand, 55% % believes that it would be beneficial for the environment but they doubt that it would benefit them economically. Additionally, 25% answered that although it will be beneficial for the environment, it will carry an economic cost for their company.

8. Do you apply any circular economy methods within your SME?



Graph 8

- As shown in Graph 8, 30 % of the respondents apply circular methods within their company.

SECTION 3: GREEN MEASURES

8.1. Please explain the circular economy methods you apply:

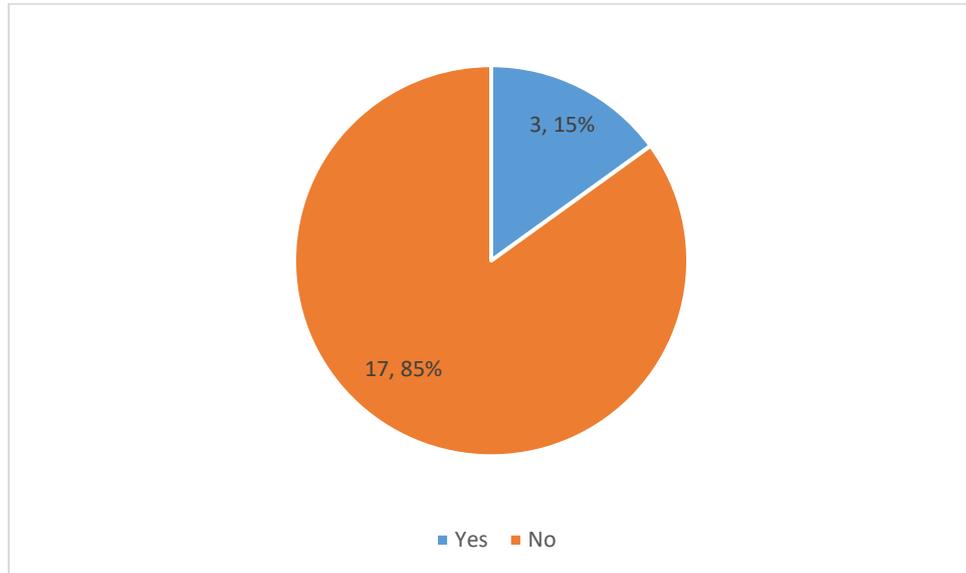
The 3 respondents which apply circular economy methods within their SME stated the following answers:

Respondent 1: Recycling

Respondent 2: Recycling materials for product packaging

Respondent 3: In R&D projects we reuse manufacturing materials and make updates to our robots so as not to become obsolete.

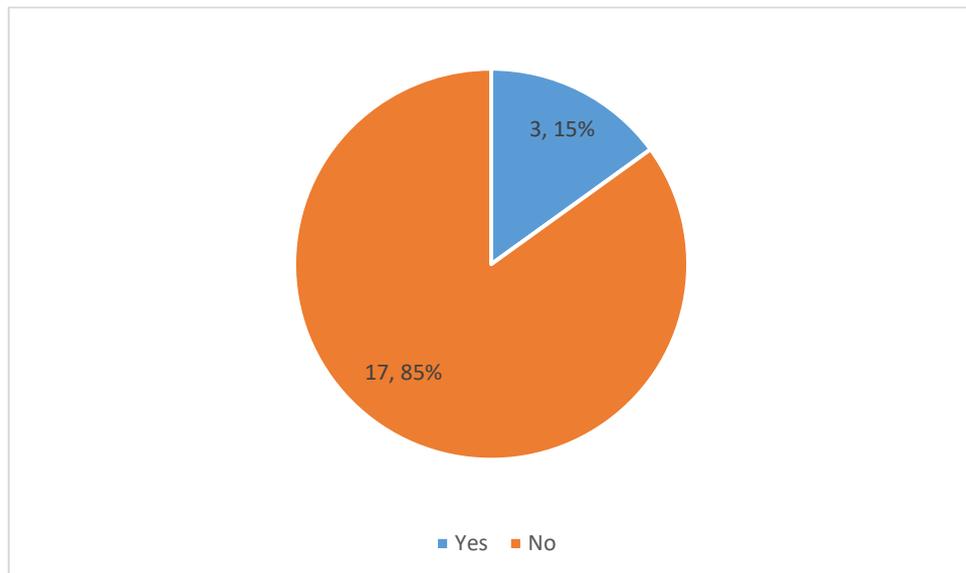
If no: 8.2. Would you like to know how to apply circular economy tools?



Graph 9

- As shown in graph 9, 85% of the respondents that do NOT apply circular economy methods, would like to know how to apply circular economy tools.

9. Do you know the generated carbon footprint of your company? (all greenhouse gases emitted by direct or indirect effect)



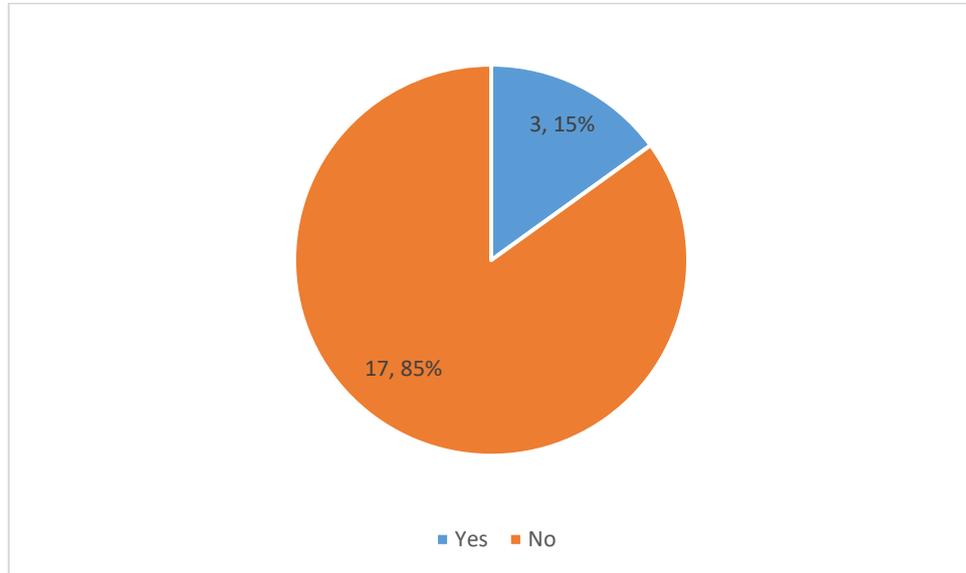
Graph 10

- 85% of the respondents know the generated carbon footprint of their company.

If yes: 9.1. Please indicate which calculator you use:

- Quantifying direct and indirect greenhouse gas emissions
- We have conducted a study of every part we use in the manufacture of a drone.

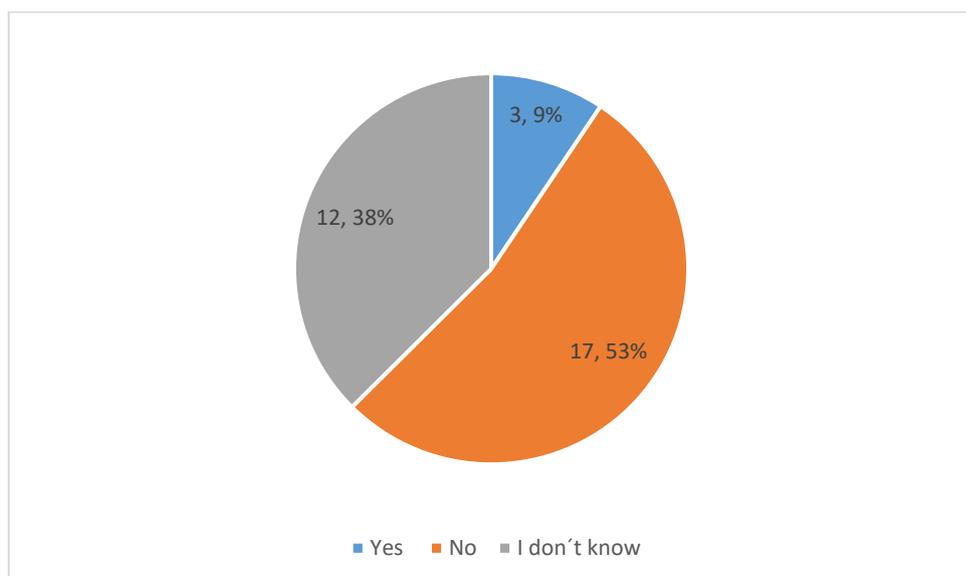
If no: 9.2. Would you like to learn how to measure the carbon footprint of your SME?



Graph 11

- Almost all of the respondents (85%) expressed that they would like to learn how to measure the carbon footprint of their SME.

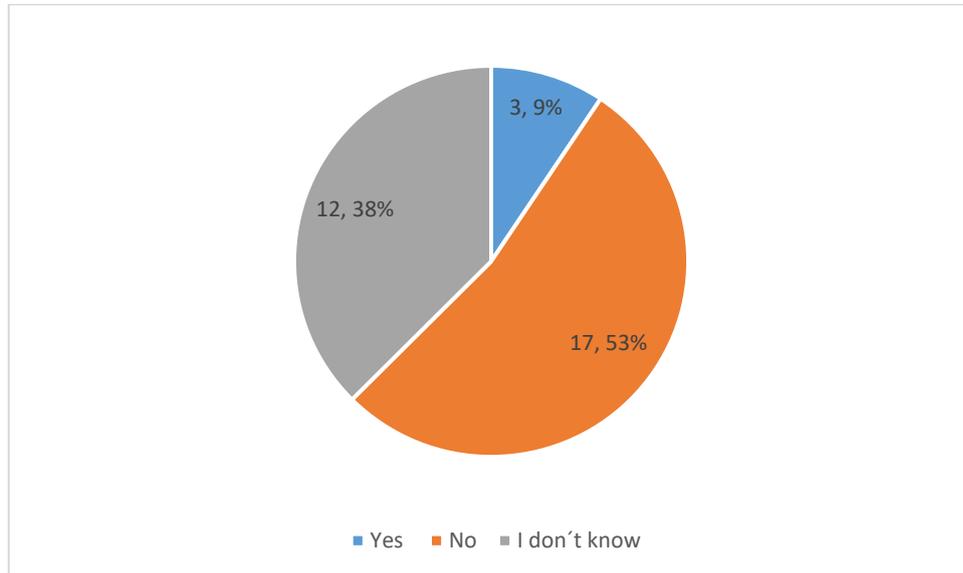
10. Do you measure the environmental footprint of your SME?



Graph 11

- According to Graph 11, 9% of respondents measure the environmental footprint of their SME, 53% do not and 38% do not know.

11. Is your SME energy efficient?



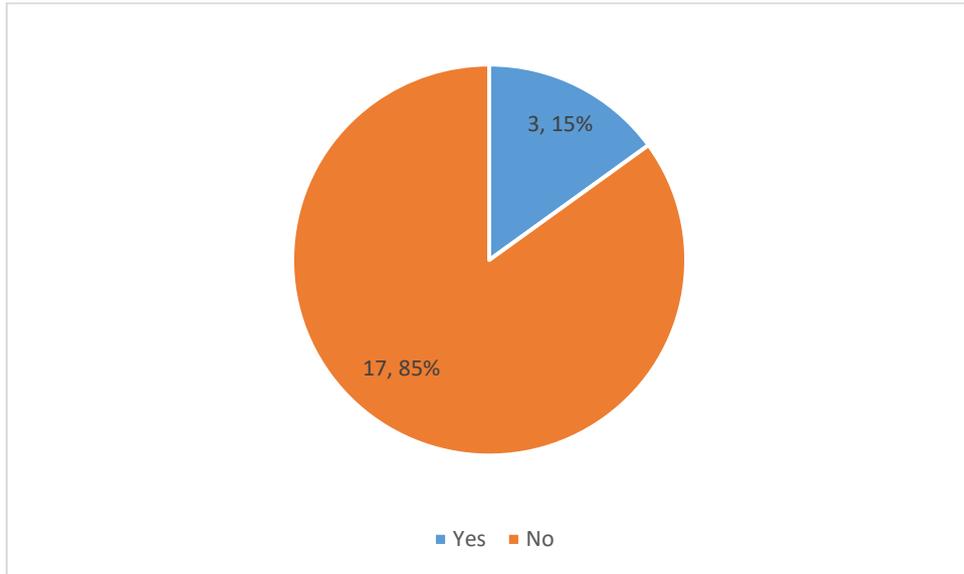
Graph 12

- According to Graph 12, majority of the respondents (60%) do not know if their SME is energy efficient. 30% expressed that their SME is not energy efficient and only 10% expressed that their SME is energy efficient.

11.1 If yes, in which ways is your company energy efficient?

- The interviewees have not answered this question. This is a significant indicator that shows the lack of knowledge among SME decision takers.

12. Do you follow any internal communication strategies to establish green operation measures in your SME? If yes, please explain.



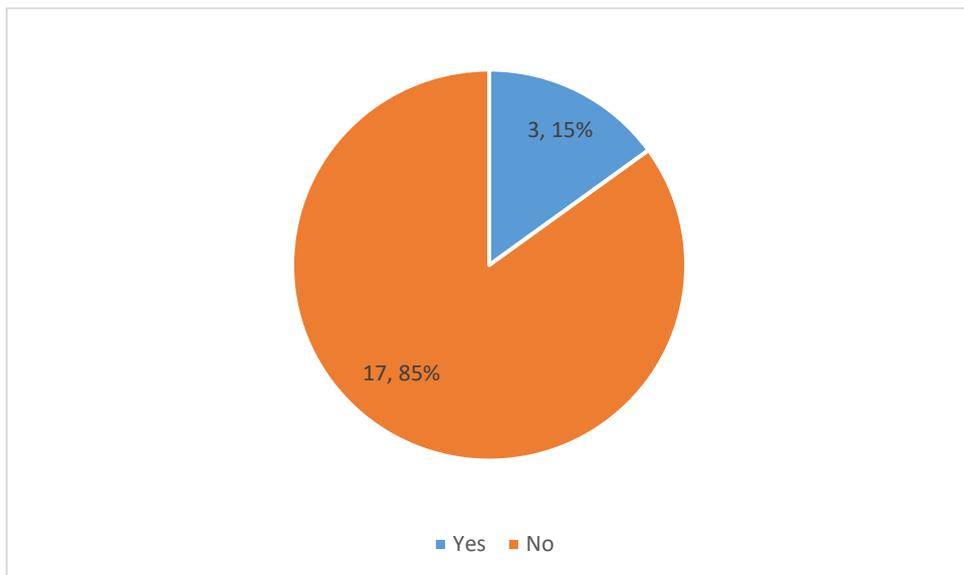
Graph 13

- Only 15% of the respondents follow internal communication strategies to establish green operation measures in their SMEs.

Respondent 1: In our QMS and 5S procedures for recycling are indicated

Respondent 2: Waste recycling and reuse of materials

13. Do you train your employees to stay aware of green measures? If yes, please explain how.



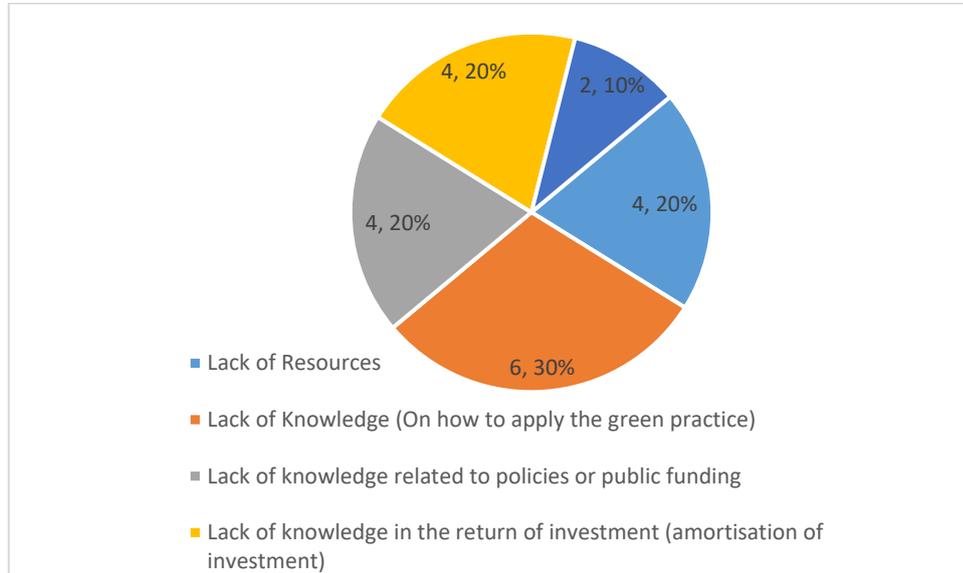
Graph 14

- Only 15% of the respondents train their employees to stay aware on green measures.

The respondents gave the following answers:

Respondent 1: Welcome handbook of the company

14. We have been willing to apply green practises but we have not yet due to:



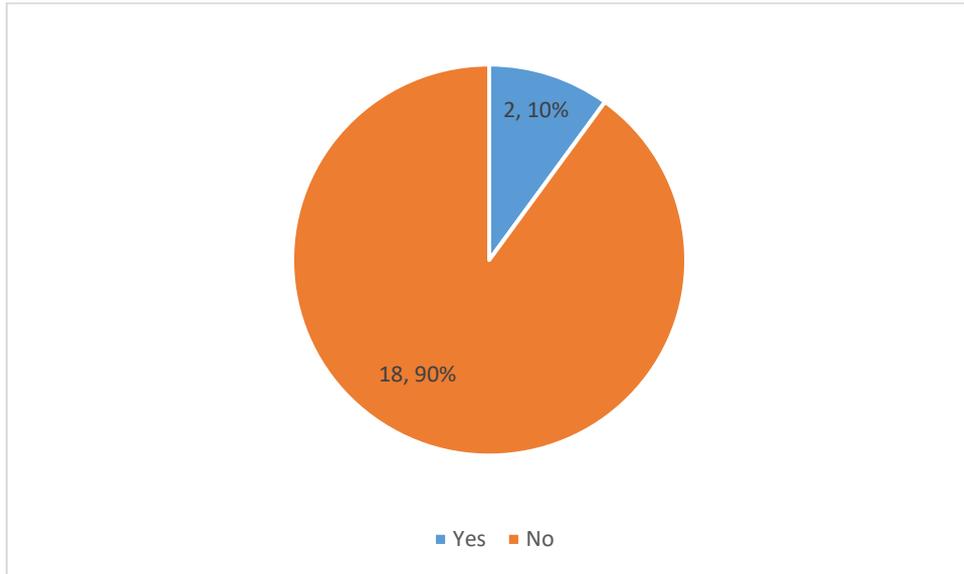
Graph 15

- According to Graph 15, the respondents have not applied green practices because of different reasons. According to the graph we can not say there is a specific reason since the percentages between the 4 reasons are pretty similar. Thus, we can confirm that the main reason is the lack of knowledge without specifying which kind of knowledge.

15. What are your concerns when applying green measures?

- Time and investment
- Identify which measures can be applied according to our activity and do it in a sustainable way in terms of investment and return on investment.
- Which can be more costly
- Adaptation
- Lack of resources (high initial investment)
- Its real effectiveness

16. Have you received any training on the topic of environmental impact of the business operations?



Graph 16

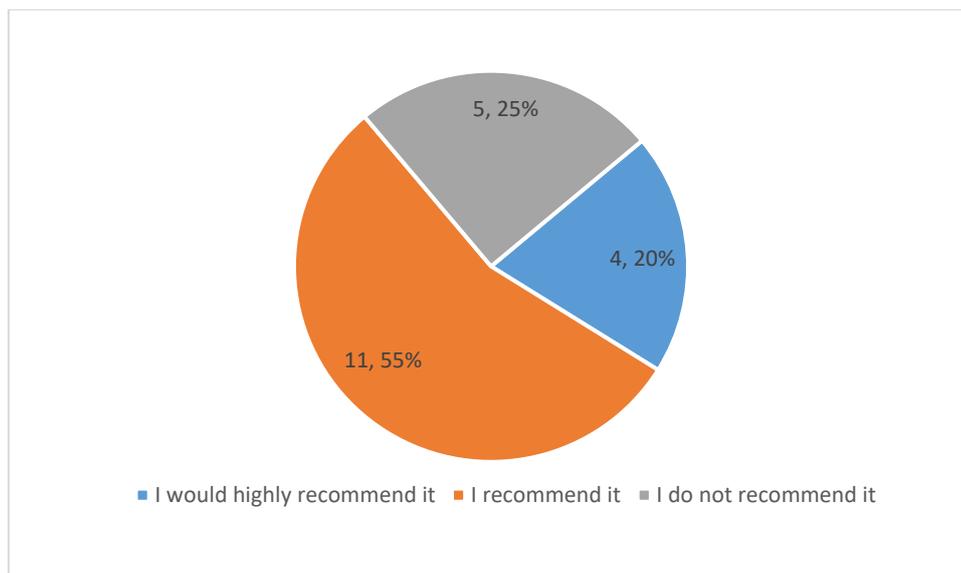
- None of the respondents have received training on the environmental impact of their business operations.

16.1 If yes, what was the outcome and was the information useful?

- ISO 14001
- Yes, the outcomes where vey usefull

LAST SECTION: BALANCE project

17. How likely would you recommend this report to other stakeholders?



Graph 17

- As shown in Graph 17, the respondents would recommend the Balance report to other stakeholders. 20% would highly recommend it and 55% would recommend it.

18. How can the BALANCE Project help your organization become greener and more sustainable? Please, explain in detail your needs.

Answers:

- Information and training.
- I don't know
- Proposing actions to improve circular economy and energy efficiency in manufacturing companies. In aspects such as mobility, packaging, building, etc., it is relatively easy to identify areas for improvement, but there are sectors and activities where things get more complicated.
- In manufacturing SMEs we usually have waste management companies, but we do not know how this waste is processed once it leaves our facilities; are there ways of filtering and reusing cutting oils and drilling oils without them having a harmful effect on the machines; how can we reduce the energy consumption of our facilities without incurring exorbitant costs; and how can we reduce the energy consumption of our facilities without incurring exorbitant costs? These are some of the issues I question.
- I found the report to be vague and superficial.
- With the incorporation of a greater amount of renewable energy

Conclusion

The survey was completed by 20 SMEs decision makers from 10 different sectors in Spain, all of them located in the Basque region. The SME's that participated mainly belonged to the service sector and the manufacturing sector. Regarding the SME's decision makers' awareness on green economy the results of the survey show that the respondents need to improve their knowledge on such topics. For example, only half of the respondents (70%) were aware that Europe aims to become a climate neutral continent by 2050. Moreover, 25% of the respondents are not familiar with the green policies in Spain. There is a clear need to inform SMEs about the existing financial environmental aids as 70% express that they are not aware of them. In addition, 85% of the respondents of the survey expressed that they need more information on green policies. Another interesting point that can be drawn from this section of the survey is that slightly more than half of the respondents think that implementing green measures in their company would be financially and environmentally beneficial for their company in the future. The other half (45%) believes that it would be beneficial for the environment but they doubt that it would benefit them economically and that it will carry an economic cost for their company. Therefore, SMEs need to be provided with examples and training on how to transform into greener operations without suffering economically.

Regarding SMEs and green measures the majority of the companies do not seem to apply circular economy methods. However, those who do not, 85% have expressed their interest and willingness to learn how to apply these methods. Another noteworthy fact is that only 15% of the SMEs decision makers know how to generate the carbon footprint of their company, but the majority would like to learn how to measure it. Only 15% of the companies that answered the survey seem to follow internal communication strategies to establish green operation measures in their SMEs mainly by quality systems or handbooks delivered to new employees to make sure that they are aware of the green. The SMEs decision makers expressed that the main reasons they have not been implementing green practises are the lack of knowledge on how to apply the practices. Lack of knowledge related to policies and public funding, the return of investment and the lack of resources seem to be important reason not to implement green practices.

Another things that SMEs decision makers are concerned about when applying green measures are the time and investment needed and the effort this new measures needs to adapt to a new way of working. Apart from that, it is also very difficult to identify which measures can be applied according to their activity and do it in a sustainable way in terms of investment and return on investment. Sometimes they also know the actions the want to make but they don't know the real cost. They lack on guidance and experience. This is not surprising since 90% of them have receive training on environmental impact of their business operations.

The respondents of the survey had the chance to ready the executive summary of the Balance Report and were then asked to share their opinion on it. 75% of the interviewees would recommend the Balance report to other stakeholders. 20% would highly recommend it or 55% would recommend it and the 25% would not recommend the report.

The respondents mentioned that they are in need of information and training. They would like to receive information about specific actions to improve circular economy and energy efficiency in manufacturing companies. In aspects such as mobility, packaging, building, etc., they belief that it is relatively easy to identify areas for improvement, but there are sectors and activities where things get more complicated. In manufacturing SMEs they usually have waste management companies, but they do not know how this waste is processed once it leaves our facilities. Are there ways of filtering and reusing cutting oils and drilling oils without them having a harmful effect on the machines; how can we reduce the energy consumption of our facilities without incurring exorbitant costs; and how can we reduce the energy consumption of our facilities without incurring exorbitant costs? These are some of the issues they have and we will try to solve with the Balance Training program.

To conclude, it was surprising how little knowledge or awareness there was of green measures, environmental sustainability, monitoring possibilities or the potential of initiatives, grants and subsidies. A lack of training and support can be cited as main causes. Small and micro-companies are likely to find it difficult to respond to initiatives due to lack of resourcing, time and effort. Surprising, because Spain maintains an above-average performance in terms of eco-innovation, albeit gradually decreasing its position amongst EU28 in the last years. The country is ranked 11th with a score of 104 in the 2019 Eco-Innovation Index, close to the EU

average. The country's strongest performance is in eco-innovation activities and the third position overall after Czech Republic and Sweden. The performance of eco-innovation inputs remains below the EU average, while eco-innovation outputs and resource efficiency outcome show scores above EU average.

