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# NET0Manager Survey Report

## SMEs' CO2 Management and Net0 Competencies

*Carbon Management Training course for entrepreneurs of a net zero tomorrow*



*Number of project: 2023-1-IT01-KA220-VET-000151858*

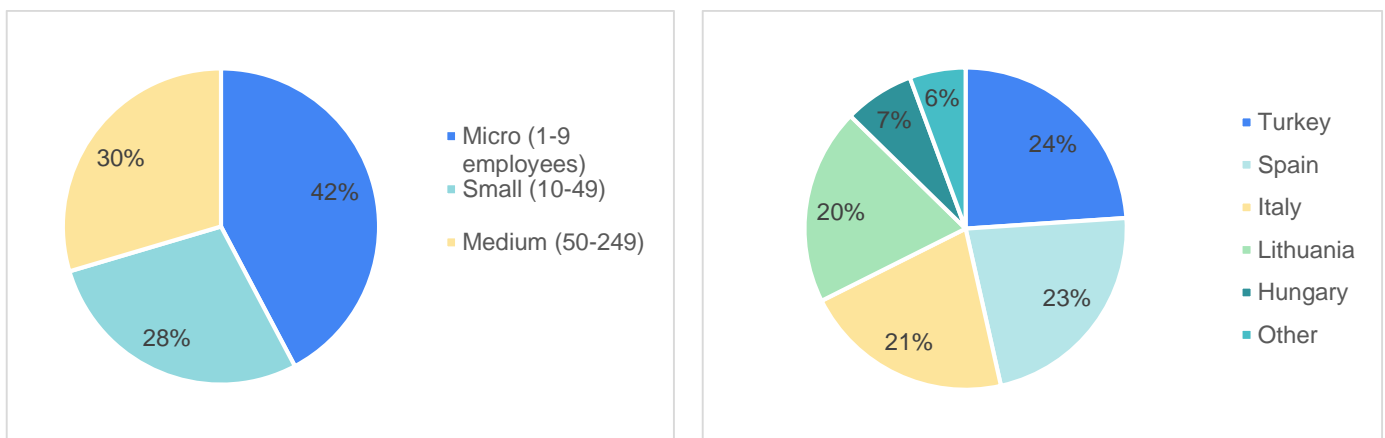
## Introduction

The EU's commitment to climate neutrality by 2050 and emissions reduction is shaping a business landscape where sustainability is not only a moral imperative but also an obligation and a key driver of competitiveness and long-term business success.

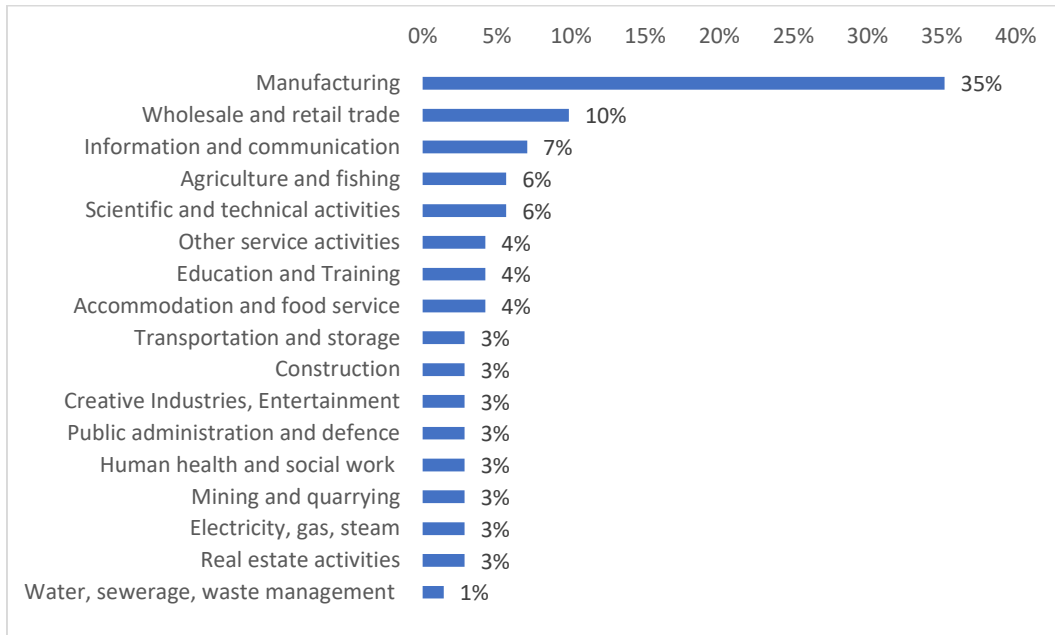
Net0Manager project partners are aiming to support small and medium enterprises (SMEs) and entrepreneurs to respond to climate neutrality objectives by designing the CO<sub>2</sub> management and Net0 course to fill the gaps in Net0 knowledge and equip you with the skills needed to navigate the complexities of carbon footprint reduction. Net 0 partners launched a survey addressed to SMEs to understand what challenges and obstacles companies face managing emissions and moving towards Net0 and what competencies they need for building climate-neutral, environmentally conscious businesses. Over 70 SMEs participated in the interviews conducted by the Net0Manager partners: Training2000 (IT), Innogestiona Ambiental (ES), research Institute HEFTA (HU), European Entrepreneurs CEA-PME (BE), Sunrise Tech Park (LT) Gebze Technical University (TR). The valuable insights from the survey will be integrated into shaping a course for the Net Zero managers building a more sustainable future.

## Profile of respondents

The survey is mainly focused on SMEs, with micro-enterprises (1-9 employees) comprising 42% of the sample; small enterprises (10-49 employees) and medium enterprises (up to 249 employees) accounted for 28% and 30% respectively. Respondents came from Net0Manager partner countries mainly Italy, Spain, Lithuania, Turkey with smaller participation from Hungary and other countries.

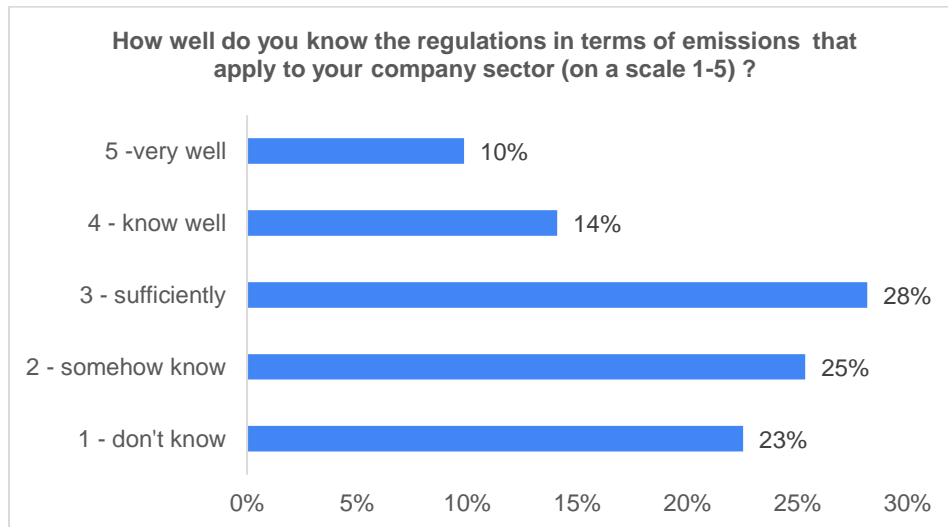


The surveyed companies belong to various industrial sectors. The considerable part (35%) came from manufacturing, as environmental requirements and sustainability are crucial considerations for manufacturing SMEs. Other part of SMEs hailed from wholesale and retail sector (10%), information and communication (7%), agriculture and fishing (6%) scientific and technical activities (6%). Other various sectors contributed 3% to the survey participation.



### Knowledge of Net0 Concept

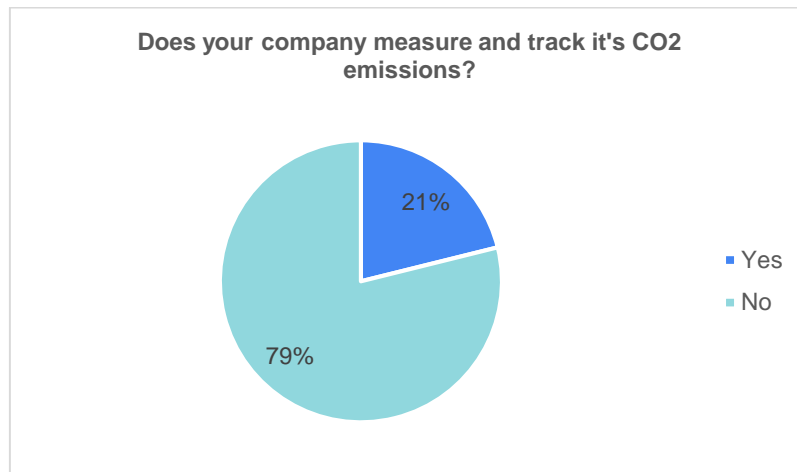
Majority of respondents (61%) are familiar with Net Zero concept and are aware of the regulation, applied for emissions in their sector very well or well (24% altogether) and 28% claim they have sufficient knowledge in this respect. However, a notable portion 23% lacks awareness of emissions regulations and 25% has only some understanding.





## CO2 emissions inventory, measurement and reporting

Most of surveyed SMEs (79%) do not track their emissions, some because are very small, some are not required to do it. Only 21% of interviewed companies are measuring and tracking CO2 emissions.



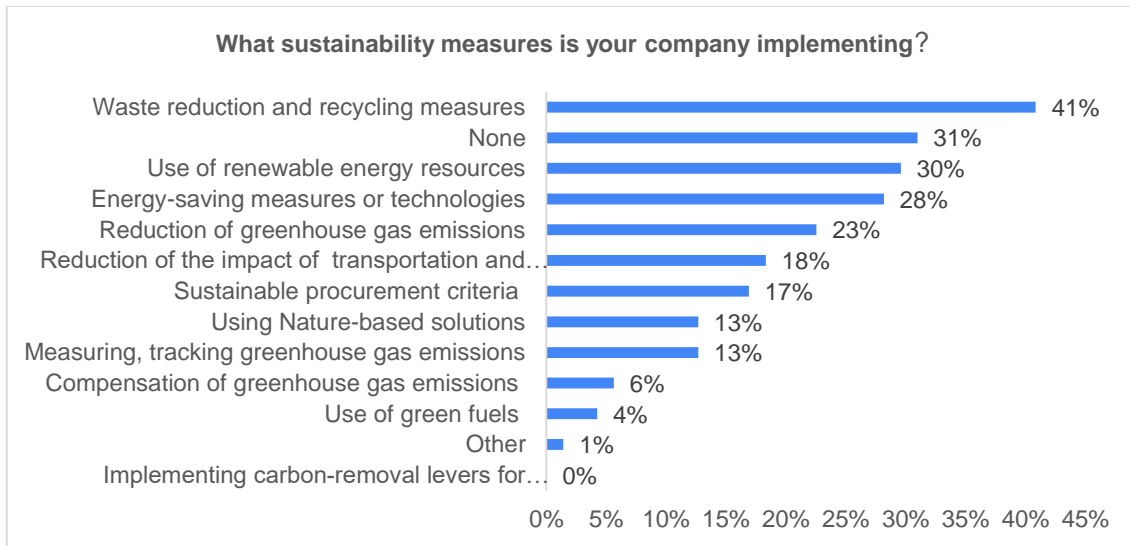
More than a half (55%) indicated that they do not need support in tracking and measuring emission and almost a half (45%) prefer such kind of support. Only 17% of respondents are obliged to report emissions by regulation. Most of reporting companies (75%) indicate that they have no problems with reporting but still almost a half of them (including some with no problems) indicate that they find regulation complex and calculation of emissions and data collection is a difficult process.

## Company's policies and commitments towards Net0

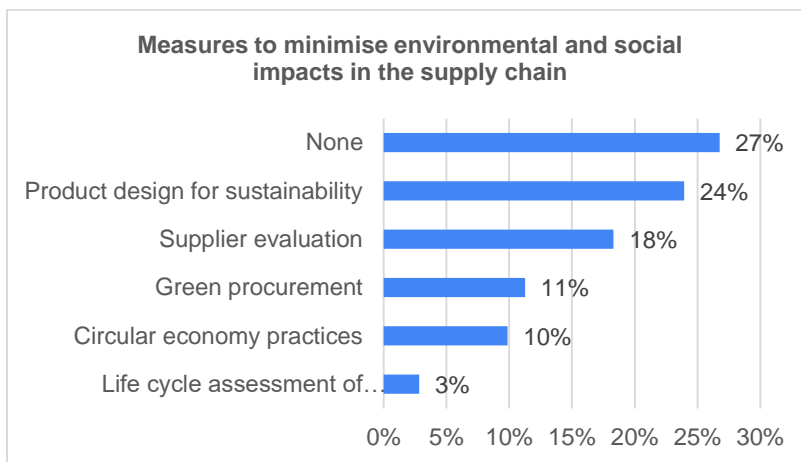
Approximately 30% of companies indicate that they have some form of sustainability or CO2 management policy in place. Quite significant part 69% implement sustainability measures. However, 31% of companies reported none of the listed sustainability measures, indicating a significant portion that has yet to engage in environmental initiatives. A considerable number of companies apply waste reduction and recycling measures (41%), with a smaller percentage using renewable energy sources (30%) and energy-saving technologies (28%). Considerable part of interviewed companies (23%) is concerned about the emissions and apply reduction measures, indicating a broad commitment to carbon reduction efforts. 18% of companies are working to reduce the environmental impact of transportation and travel activities, potentially through strategies like promoting telecommuting or using electric vehicles. 17% of companies have implemented sustainable procurement criteria, suggesting a focus on sourcing environmentally friendly materials and products. 13% of companies are actively measuring and tracking their greenhouse gas emissions, reflecting a commitment to understanding their environmental impact. Similarly, 13% of companies are employing nature-based solutions, such as reforestation or wetland restoration, to mitigate their carbon footprint. None of participating companies are familiar with carbon removal levers, and only 6% apply compensation of greenhouse gas emissions and 4% - green fuels. Overall, there is a diverse array of sustainability measures being implemented by companies, the data highlights both progress and opportunities for further action in for reinforcing corporate sustainability and CO2 management. Interestingly, although many companies



engage in sustainable activities, majority of respondents (54%) do not communicate their sustainability measures and policies to the public.



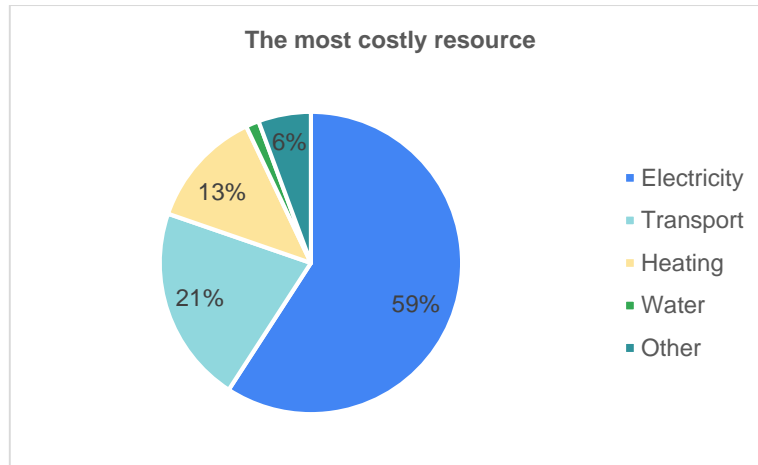
In terms of supply chain practices, a notable portion of companies (27%) refrained from initiatives aimed at reducing environmental and social impacts within their value chain. A considerable part of 24% prioritize product design for sustainability, 18% conduct supplier evaluations, and 11% adhere to green procurement criteria. Notably, only a modest 10% integrate circular economy practices within their value chain considerations and very few apply life cycle assessment to their products.



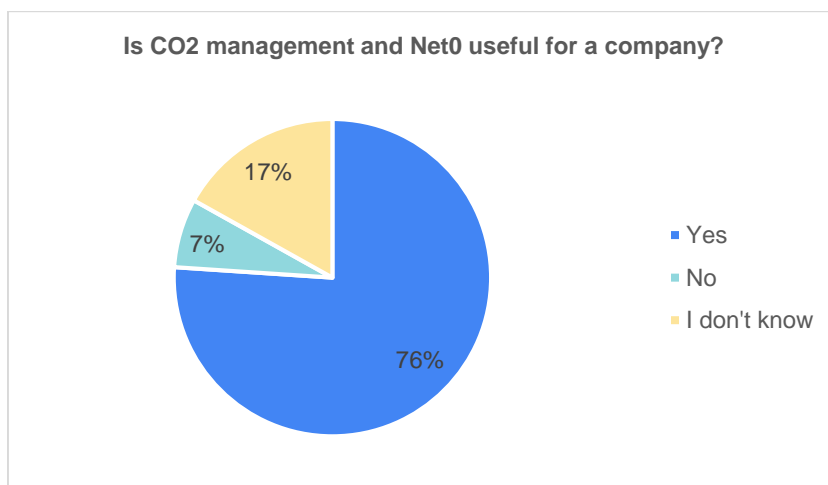
SMEs were asked about their intentions to what degree to they intend to adopt CO2 management and Net Zero measures. 21 % of respondents think that they don't need it and are not willing to implement CO2 management or Net Zero measures. 30 % responded that implementing CO2 management and Net Zero measures is not a need for a company, but the company is willing to implement it. And bigger part 45 % consider that implementing CO2 management or Net Zero measures is a need for a company and it intends to implement it.

### Barriers and advantages of Net Zero

Financial constraints are the most common barrier to Net Zero adoption. Other factors such as the complexity of measuring emissions, supply chain constraints, lack of knowledge, and regulatory framework are also substantially important to SMEs. The resources causing the most cost is electricity for the majority of respondents (59%), followed by transport 21% and heating 13%. Some mentioned water, wood and steel as important resources for their production.



Companies also recognize the advantages of Net Zero policies. As important advantages they see innovation and technology leadership, possible cost saving, competitive advantage, long-term resilience and customer loyalty. 76% of respondents recognise CO2 management and Net Zero policies beneficial for a company, with only 7% expressing no use in them, and 17% remaining uncertain.

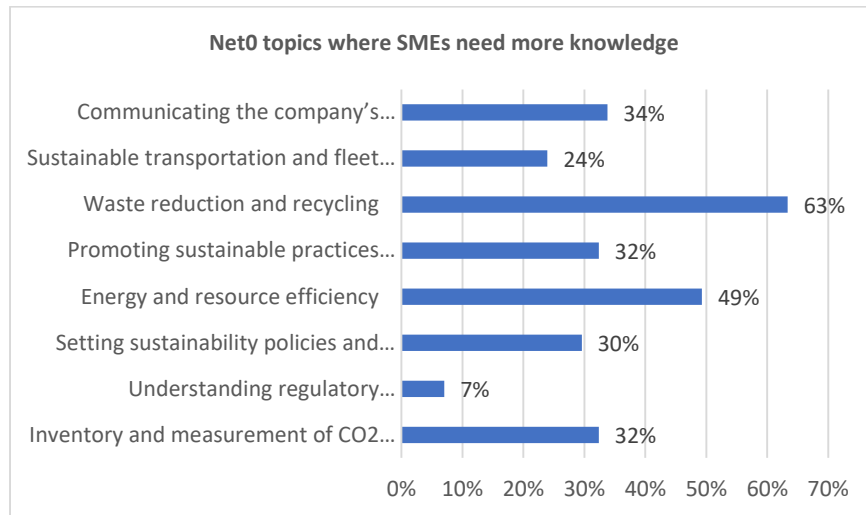


### CO2 management and Net0 training needs

SMEs recognise the importance of sustainability training and 37% of interviewed state that their representatives or employees already took part in some sort of sustainability, environment or ESG related training. However, 63% didn't have an opportunity to enhance their knowledge in CO2 management.



Significant 69% express interest in training to acquire competencies in CO2 management and Net Zero. Companies are most interested to learn about waste reduction and recycling measures (63%) and energy and resource efficiency (49%). Only 7% would like to enhance knowledge on regulatory requirements. Other topics such as communicating company’s sustainability, sustainable transportation, CO2 measurement and inventory, sustainability in value chain, Net Zero goals and policy setting also gain sufficient interest (24%-34%).



Majority of respondents (59%) could dedicate 2 hours for a training per week and see 24 hours as an optimum duration for a training (55%). 58% would like to have accredited course.

### Conclusions

Overall, the findings indicate a significant opportunity for supporting SMEs in addressing climate neutrality objectives through targeted training and support in CO2 management and Net Zero measures. A majority of respondents (69%) express interest in training to acquire competencies in CO2 management and Net Zero measures.

Given that a substantial portion of SMEs (39%) lack comprehension of the Net Zero concept, the training course should explicitly target this skills gap and raise awareness about Net Zero principles and transition towards climate neutrality. As majority lacks awareness on regulations of emission, the training should provide insights into policies and regulations that encourage the shift towards Net Zero.

Many companies are concerned about sustainability and admit, that integrating CO2 reduction and achieving Net Zero emissions is imperative for a company, and are committed to implementing these measures. Majority (69%) already apply sustainability measures. Therefore, the course shall promote sustainability measures that will help SMEs to reinforce these competencies and develop tailor made Net Zero strategies. Modules shall delve into the sustainability measures emphasised by SMEs such as waste reduction, recycling, energy efficiency and the use of renewable energy sources, additionally, increasing awareness and highlight the benefits of the measures which are less common to demonstrate possible options for reducing emissions and



encourage wider their adoption among SMEs. Given that a majority SMEs identify electricity and transport as their highest expense, the training will furnish examples and highlight technologies that prioritize cost and emissions reduction in this regard. A majority of SMEs do not monitor their emissions (79%), highlighting a notable deficiency in managing their carbon footprint, a crucial aspect that shall be addressed by the training course. As data show, while some companies are making significant efforts in reducing their environmental footprint, others have yet to embark on sustainability initiatives, which highlights the importance to have a course on Net0 practices and to communicate advantages of becoming Net Zero.

The data shows that SMEs yet underscore the importance of addressing supply chain sustainability in corporate practices, which also highlight the area of improvement. The dedicated module on Net Zero across value chain should demonstrate how to build resilient and emission free value chain, to empower companies to minimize their environmental and social impacts.

While many companies are actively involved in sustainable practices, a significant majority doesn't communicate these efforts to the public. This gap presents a compelling opportunity for including a module on effective sustainability communication.

The structure of the course will align with the expressed interests and needs of respondents. The modular course will offer flexibility in course duration and scheduling allowing to choose which modules to follow, to accommodate the preferences of participants. Given the preference for an accredited course among respondents, NetOManager will seek to ensure that the training course meets required standards and offers recognized certification upon completion. This will enhance the credibility and value of the course for participants.