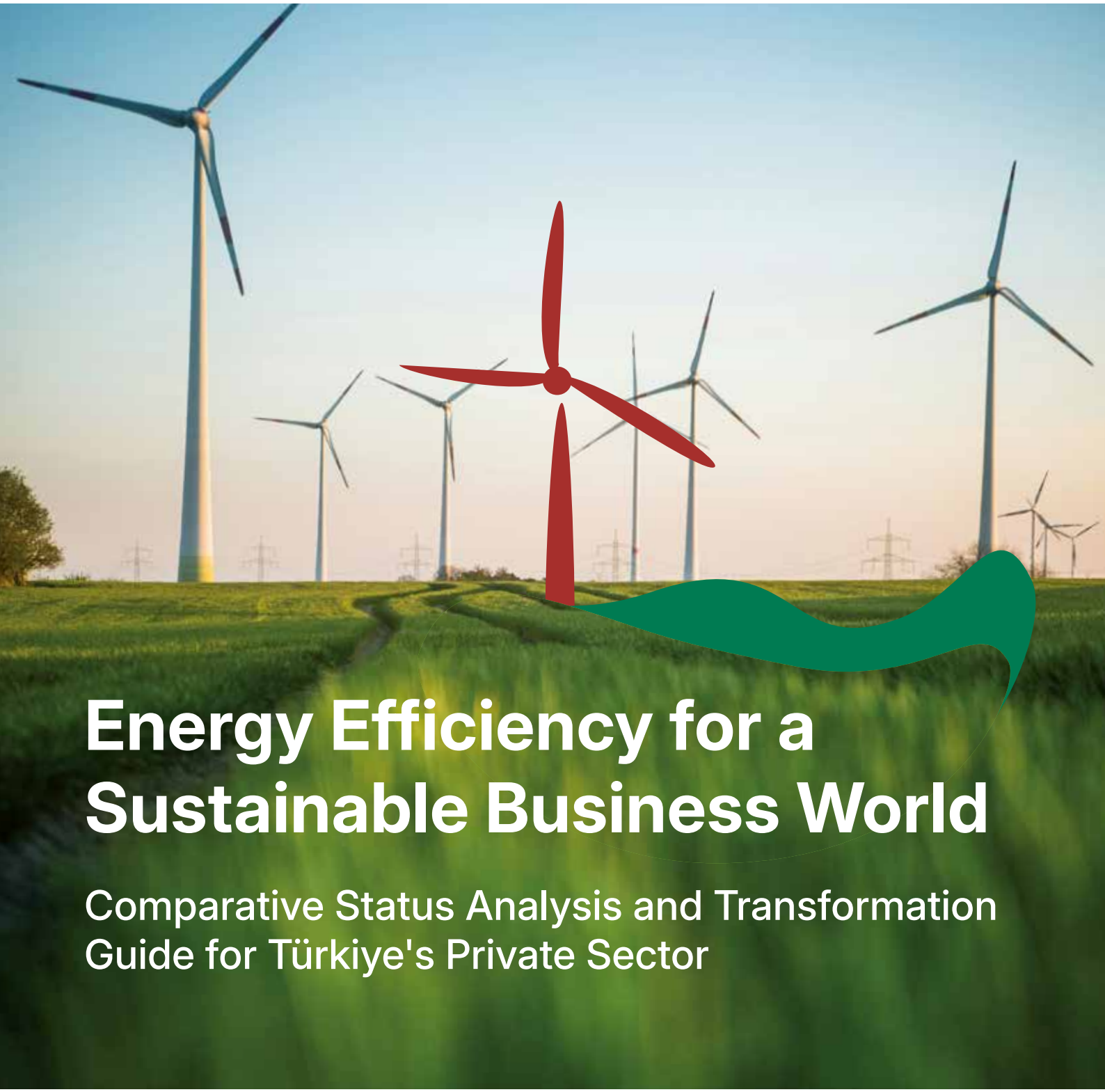
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TEBDII TÜRKİYE-EU BUSINESS DIALOGUE II



Energy Efficiency for a Sustainable Business World

Comparative Status Analysis and Transformation Guide for Türkiye's Private Sector

EUROCHAMBRES

The Türkiye – EU Business Dialogue II (TEBD II) Project

The Türkiye-EU Business Dialogue II (TEBD II) is an EU funded project implemented by Eurochambres in close cooperation with the Union of Chambers and Commodity Exchanges of Türkiye (TOBB).

TEBD II was designed to enhance mutual understanding and collaboration between Turkish chambers and commodity exchanges, and their EU counterparts. The project aims to facilitate the integration of Turkish and EU business communities, fostering stronger economic ties between Türkiye and the European Union (EU), as well as helping to raise awareness of both the opportunities and challenges related to Türkiye's potential EU accession.

The TEBD II project runs from October 2024 to October 2027 and foresees a wide range of collaborative activities. These will feature high-level business dialogues, SME surveys, workshops hosted by Turkish and EU chambers and commodity exchanges, and efforts aimed at capacity building, such as study visits, Chamber Academies, and Support Programmes focused on energy efficiency, sustainable growth, and EU Acquis.

Further information on the project is available on the following websites:

www.eurochambres.eu, www.tobb.org.tr , www.tebd.eu

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Foreword



Ben Butters, CEO at Eurochambres

As businesses navigate a rapidly evolving economic and geopolitical landscape, improving energy performance has become a strategic priority for safeguarding growth, stability and sustainability.

In recent years, companies have faced unprecedented volatility in energy markets, driven by geopolitical developments and disruption to global energy supply chains. Rising energy costs have placed considerable pressure on profitability, investment capacity and employment, highlighting the urgent need for practical and forward-looking solutions that strengthen resilience while supporting economic transformation.

Small and medium-sized enterprises (SMEs) are at the heart of this transition. Making up the vast majority of the business community in both the EU and Türkiye, SMEs play a critical role in driving innovation, productivity and local development. Yet they also face specific challenges, including limited resources, access to expertise and investment constraints. Supporting SMEs in improving energy efficiency is therefore not only a climate imperative but also a key lever for enhancing competitiveness and economic resilience.

The analysis presented in this report focuses specifically on SMEs in Türkiye, drawing on energy efficiency assessments conducted directly with businesses. By identifying concrete opportunities and challenges at company level, the study provides valuable insights into how SMEs can pursue their energy transition in a pragmatic, economically viable and scalable manner.

This work was carried out within the framework of the EU-Türkiye Business Dialogue (TEBD II) project, with the objective of strengthening the capacity of chambers and commodity exchanges in Türkiye to develop and deliver energy efficiency services to their members. Chambers and commodity exchanges occupy a unique position at the interface between policy and business reality. Through trusted guidance, knowledge transfer and peer exchange, they play a pivotal role in translating strategic priorities into practical action and supporting enterprises throughout their transition journey.

As cooperation between the EU and Türkiye continues to deepen around shared priorities including competitiveness, sustainability, innovation and enhanced connectivity, initiatives such as TEBD II also contribute to broader strategic frameworks, including the EU's Cross-Regional Connectivity Agenda linking the European Union with Central Asia via Türkiye and the South Caucasus. Strengthening business cooperation within these evolving connectivity corridors further reinforces the role of SMEs as drivers of economic integration, resilience and sustainable growth.

Eurochambres remains committed to fostering strong partnerships, empowering chambers and commodity exchanges and supporting SMEs in navigating the energy transition with confidence. By working together — policymakers, chambers and commodity exchanges and businesses — we can turn today's challenges into opportunities, accelerating the shift towards a more competitive, sustainable and resilient economic future.

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Section 1
Executive Summary

The TEBD II *"Energy Efficiency Support Programme"* aims at developing capacity and knowledge within Türkiye's chambers and commodity exchanges, which will allow them to advise SMEs/ members on how they can reduce their energy consumption and thus become more competitive and raise the awareness on Energy Efficiency.

The first edition of the Energy Efficiency Support Programme was carried out under the TEBD I project, ending in 2022. Building on this experience, the TEBD II Energy Efficiency Support Programme commenced in May 2025 and concluded in February 2026. This action consisted of **three main components**:

1. **Toolkit and Questionnaire Design:** An updated Energy Efficiency Checklist and an Energy Efficiency Questionnaire for businesses were designed. Both were based on earlier versions from the TEBD I programme (2021) and updated to reflect recent sectoral developments.

2. **Training Delivery:**
   - An in-person training on energy efficiency (policy, measures for businesses, case studies, and toolkit usage) was delivered. This training was held in person in Ankara in June 2025 for 25 Turkish chambers and commodity exchanges representatives selected by Eurochambres. Executives were selected from across Türkiye (regional spread), with a focus on offering the opportunity to Turkish chambers and commodity exchanges, and following the competences profile criteria that were explained in the Call for Participants. The training was delivered by four Energy Efficiency experts, selected through a competitive call by Eurochambres.
   - Two online events were organised in July and September 2025, respectively a webinar attended by 150 Turkish SMEs and a follow-up training for Energy Efficiency Ambassadors before the launch of the SME audits. These online events covered up-to-date concepts, methods, EU projects, energy efficiency case studies from the EU and Türkiye, as well as funding opportunities for energy efficiency.
   - Following the training, each of the 25 Energy Efficiency Ambassadors committed to carry out 10 energy efficiency audits among Turkish SMEs using the Toolkit, started their visits. By the end of Support Programme, a total number of 254 SME audits have been carried out.

3. **Data Compilation:** Information gathered from the training and the questionnaires completed by the participating SMEs was compiled for inclusion in this report. The information was collected in tandem with the energy efficiency visits by the selected representatives from, Turkish chambers and commodity exchanges, with collection completed by early February 2026, and analysis completed by end of February 2026.

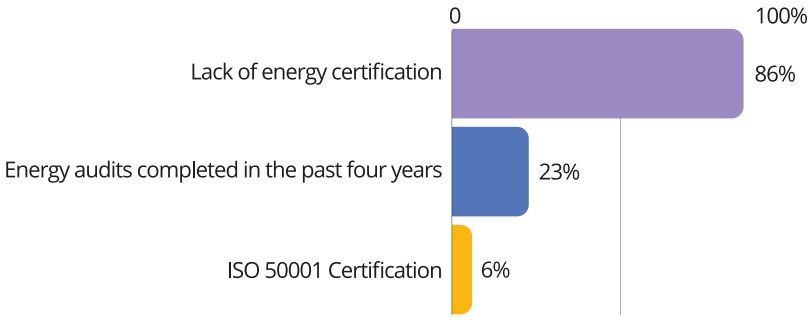
Summary of 2025-2026 Respondent Data

Analysis of energy audits of 254 Turkish small-to-medium enterprises (SMEs) reveals that while businesses are **highly aware of rising energy costs**, their **practical adoption of formalized energy management remains in a relatively preliminary stage**.

Only 23% of the respondent businesses, predominantly SMEs, have completed an energy audit in the past four years. Furthermore, 86% lack any building energy certification, and merely 6% hold an ISO 50001 certification. This suggests that **significant energy savings and renewable energy opportunities are not being identified, remaining unrealised due to low visibility**. This is further exacerbated by a significant 73% of businesses operating without a designated energy manager.

Beyond the lack of certifications, **fundamental energy monitoring is missing**. 79% of businesses do not use Key Performance Indicators (KPIs) like kWh per tonne or kWh per employee to calculate unit costs. 11% of companies are unaware of the share energy costs represent in their total expenses, and 36% do not know how much energy was saved after implementing efficiency measures. Furthermore, 63% lack a formal energy efficiency program or policy, and 75% operate without an ESG strategy.

254 energy audits of Turkish SMEs



Despite the lack of formal systems, **organic interest in efficiency is very high, driven largely by financial pressure**. 85% of businesses expect their energy costs to increase significantly, driving 84% to consider energy efficiency when purchasing new equipment. Over the next four years, 78% plan to implement new efficiency measures, and 79% intend to integrate additional renewable energy sources. Notably, almost half (49%) of the businesses currently lacking ISO 50001 are considering implementing it.

The transition from intent to action is challenged by **financing and technical constraints**. For businesses not planning to implement measures, the primary reasons include prioritizing other investments (43%), a lack of available financial resources (38%), and a lack of technical expertise (33%).

When looking specifically at **renewable expansion**, a major barrier is the physical lack of suitable space in existing facilities for installations like solar panels. Additionally, while Power Purchase Agreements (PPAs) are a standard way to control long-term energy costs, only 77 companies plan to establish one, while 136 have ruled it out, indicating limited adoption of long-term procurement mechanisms.

Lack of financial feasibility is a recurring theme, exacerbated by **systemic gaps in how subsidies and support are structured and communicated**. Businesses consuming less than 500 Toe annually are largely ineligible for current financial support measures. This represents a significant gap, as 43% of respondents fall below this 500 Toe consumption threshold. Even when measures exist, 64% of businesses have not checked if they are available. As a result, only 13% of respondent businesses have successfully tapped into financial support measures.

The Role of Chambers and Commodity Exchanges

To bridge the gap between the high interest yet low technical execution, outreach programs are highly recommended. The chambers and commodity exchanges have a **strong capacity for outreach and securing business collaboration**. This can be evidence by the strong participation rate of businesses in the TEBD II Project.

Comparative Analysis: TEBD I & II Energy Efficiency Data (2022 vs. 2026)

In 2022, the first Energy Efficiency Support Programme ran under TEBD I project. Between the two editions of this programme, the surveyed cohort of SMEs changed only slightly in composition. The TEBD I report (2022) analysed 236 validated responses from Turkish SMEs. The TEBD II report (2026) analysed 254 validated responses. Between the two reports, surveyed SMEs are not the same and do not necessarily have the same geographical spread.

In 2022, 79% of respondents identified as operating within the industrial or manufacturing sector. In 2026, this proportion decreased somewhat, with 58% operating in the industrial sector. There is a significant structural shift in the **energy footprints** of respondents. In 2022, 43% of companies reported annual energy consumption below 500 Tonnes of Oil Equivalent (TOE). By 2026, the proportion of companies consuming less than 500 TOE increased to 69%.

Formalized **energy management practices** remained largely unchanged across both programmes. In 2022, 73% of businesses operated without a designated energy manager. In 2026, this metric remained identical, with 73% of businesses continuing to operate without a designated energy manager. Adoption of the ISO 50001 energy management standards also showed no change; 6% in 2022 and remained at 6% in 2026. Building energy certifications are similarly unchanged and largely absent; 86% of respondents lacked building certification in 2022, and 86% lacked certification in 2026. In 2022, 8% of respondents did not know the share of energy costs relative to their total costs. In 2026, this figure increased to 11%.

While formal management systems remain weak, the data indicates an increased intent to conduct **energy audits** and implement **energy efficiency and/or renewable energy measures**. In 2022, 75% of businesses did not carry out an energy audit or consultancy visit in the preceding four years. In 2026, this improved marginally, with over 65% reporting no energy audit in the prior four years. Intent to conduct future energy audits increased. In 2022, 50% of respondents planned to conduct an energy audit within four years. Approximately 33% of those lacking prior energy audits cited subsidies as a prerequisite. By 2026, nearly 65% stated an intention to conduct future energy audits. The 2026 respondents listed subsidies as having lost importance as a motivating factor, decreasing from 6% in 2022 to just 3% in 2026. In 2022, 60% of respondents executed energy efficiency measures, with 78% of these implementations involving lighting, electrical, and IT equipment upgrades. The 2026 text indicates a higher aggregate implementation rate of 78% compared to 57% in 2022. Upgrades to lighting and IT equipment remained the most frequently implemented measures in 2026.

The data indicates an increase in specific technological deployments, alongside the emergence of previously undetected/unrecorded physical infrastructure barrier. Intent to utilize additional **renewable energy sources** remained constant at 79% in both 2022 and 2026. In 2022, 46% of respondents planned to utilize photovoltaics. The 2026 data confirm increased deployment or renewable energy and particularly photovoltaics, with 69% of companies reporting current operation of solar power plants. The 2026 report identified a significant physical constraint hindering further on-site renewable energy adoption: a lack of suitable space in existing facilities. This constraint is heavily concentrated among companies operating in factories with buildings smaller than 20,000 m², a demographic which accounts for 77-79% of the 2026 cohort.

There is clearly a persistent challenge in linking businesses to available financial support mechanisms. Utilization of financial support measures showed no improvement, with only 13% of businesses successfully utilized subsidies in 2022 – and this exact percentage of 13% was reported again in 2026. In 2022, 64% of respondents had not checked for available subsidies. In 2026, 64% remained unaware or had not checked for such measures. Supplier switching behaviour decreased. In 2022, 33% of companies had changed their electricity supplier at least once. In 2026, this rate dropped to 18%.

Conclusions

The comparative data indicates the following conclusions regarding the evolution of energy efficiency in the targeted cohort. It is important to note that the regions and hence businesses targeted as part of this cohort are different to those targeted as part of the cohort by TEBD I. The utility of the below analysis is therefore not in longitudinal tracking of one cohort, but in comparing the needs of two different sets of regions and businesses within Türkiye:

1. **Internal technical capacity** did not improve over the four-year period. In 2022, the persistent lack of energy managers (73% in both periods), the stagnant ISO 50001 certification rate (6%), and the lack of technical expertise cited as an implementation barrier (33% in both periods) indicate businesses remain reliant on ad-hoc measures.

2. The demographic reality of SMEs remains underserved by existing financial support measures. In 2022, 43% of businesses consumed **below the 500 TOE eligibility threshold for support measures**. By 2026, 69% of businesses fell into this <500 TOE category, resulting in a larger percentage of the market being locked out of financial support measures.

3. Both reports stress the necessity of **capacity building within the chambers and commodity exchanges** to facilitate outreach, and **the restructuring of financial support** to capture businesses operating below the 500 TOE threshold.

Section 2
Energy Efficiency Experts



Geoffrey Saliba,
Malta Business Bureau

With over 15 years' experience in sectoral and business support services, **Geoffrey** has extensive experience in driving collaboration between the public and private sectors. His work on energy has focused on bridging the gaps between technical feasibility and financial viability for businesses, aimed at aligning private sector action and investment with policy, and reflecting private sector needs in data driven policy recommendations. Having served in various non-profit roles up to Board President, within the MBB Geoffrey focuses on driving collaborative efforts aimed at achieving tangible change - EU and nationally funded energy projects developed by Geoffrey have won several awards. He is also committed to sustainable development as a landlord, integrating Doughnut Economics into the restoration and upgrading of a historical property to net-positive energy.



Claudia Julius,
Senercon GmbH

Claudia holds a diploma in biology and an EU-diploma in environmental sciences. Over the last 27 years, she has worked in project development and coordination in the field of energy efficiency and climate protection at national and EU levels. Since 2009, she developed the European section and managed several EU-funded projects under Senercon. She is currently involved in three energy efficiency projects targeting businesses, which are funded under the EU LIFE programme. Senercon is an energy consultancy and software company based in Berlin that performs full, certified energy audits for companies and develops online energy advisory and monitoring tools used in European projects and national climate protection campaigns.



Istvan Szabó,
Hungarian Chamber of
Commerce and Industry

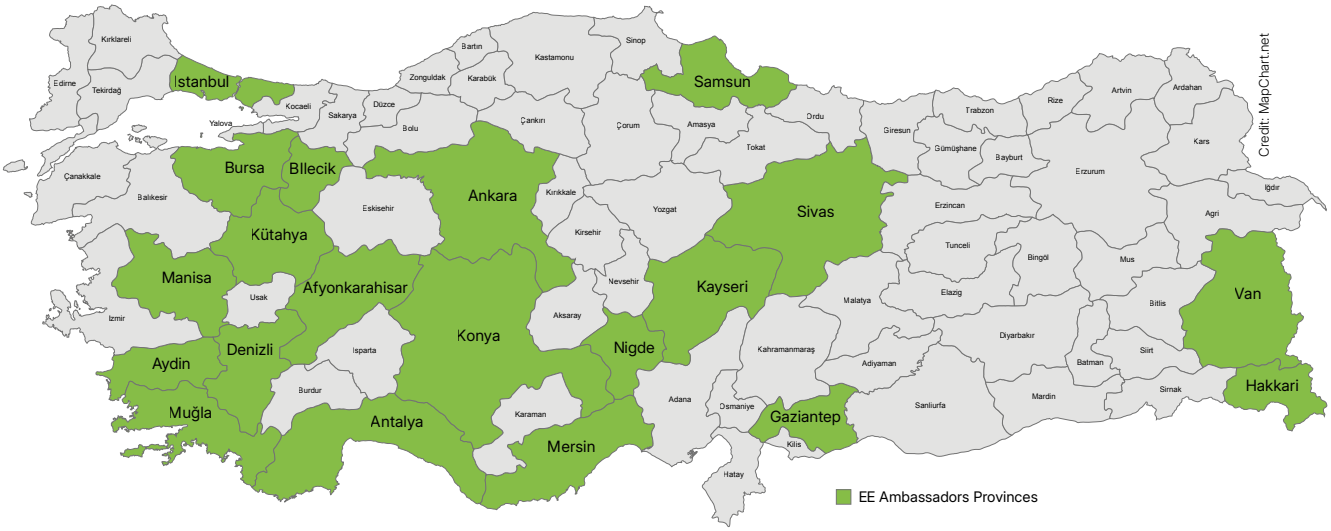
Istvan has 16 years of experience in the international wind turbine industry. This experience encompasses the planning, construction, operation and maintenance of wind turbines. He possesses a comprehensive understanding of user requirements and the available solutions for problems and ongoing developments. The ability to propose optimised solutions is predicated on the assessment of country-specific needs. Furthermore, the ability to explain implementation steps and transfer knowledge is also essential. In his capacity as Director of Strategy and Development for a SME that operates within an international market, he is well-positioned to transfer both effective and ineffective practices from his own experience.



Asuman Sönmez
(PhD), Freelance
Consultant

With over 30 years of professional experience in finance, sustainability, climate and energy, **Dr. Asuman Sönmez** is a senior consultant and trainer specializing in SME development, management, sustainable and climate finance, and energy efficiency. She has extensive experience in national (KOSGEB, TUBITAK) and international-funded (EU, UNDP, EBRD, AFD and World Bank) programmes, supporting businesses and institutions in strengthening financial performance, improving access to finance and integrating resource-efficient and low-carbon practices. Her work focuses on linking financial analysis with practical implementation, helping SMEs and public institutions translate policy frameworks and climate objectives into viable investments and operational improvements.

Section 3
Participating Chambers and Commodity Exchanges



Chamber & Exchange	EE Ambassador	Contribution to Survey
1. Alanya Chamber of Commerce and Industry	Saadet Koşmaz	12 companies
2. Ankara Chamber of Industry	Elif Ayhan / Yaşar Anıl Bayrak	13 companies
3. Aydin Commodity Exchange	Emine Ceylan Özdemir	14 companies
4. Bilecik Chamber of Commerce and Industry	Aslı Onur	11 companies
5. Denizli Chamber of Industry	Sultan Nur Duran	12 companies
6. Fethiye Chamber of Commerce and Industry	Umur Çelebi	7 companies
7. Gaziantep Chamber of Commerce	Tuğçe Ayçil	11 companies
8. Inegol Chamber of Commerce and Industry	Yağmur Akman	3 companies
9. Istanbul Chamber of Industry	Hüseyin Tanrıverdi	12 companies
10. Kayseri Commodity Exchange	Gizem Kavak Yıldırım	14 companies
11. Konya Chamber of Industry	Bayram Çakmak	28 companies
12. Kütahya Chamber of Commerce	Hüseyin Feyyaz Ebeoğluğil	9 companies
13. Manisa Chamber of Commerce and Industry	Mehmet Can Çakar	7 companies
14. Mersin Chamber of Shipping	Kerem Turgut Gulerer	11 companies
15. Niğde Chambers of Commerce and Industry	Rıfat Battaloğlu	6 companies
16. Nizip Commodity Exchange	Mustafa Çağrı Demir	12 companies
17. Polatlı Chamber of Commerce	Azra Elif Koç	4 companies
18. Samsun Chamber of Commerce and Industry	Vahide Damla Özden	12 companies
19. Tarsus Commodity Exchange	Pınar Alegöz	20 companies
20. Tavşanlı Chamber of Commerce and Industry	Hasan Hüseyin Çakmak	13 companies
21. Van Chamber of Commerce and Industry	Yunus Yetkin	23 companies

Section 4
Overview of Training Provided

The objective of this activity is to strengthen the capacity and knowledge of Turkish chambers and commodity exchanges enabling them to advise SMEs and members on how to reduce their energy consumption, enhance competitiveness, and increase awareness of energy efficiency.

Module 1 – In-Person Training in Ankara (June 11-13) - 24 Participants

As a first step, a revised Energy Efficiency Toolkit was developed, building on the previous toolkit and final report produced under TEBD I. This updated toolkit also integrates insights and methodologies from other international and EU-funded projects in the field of SME energy efficiency — including RE-VALUE, EE4SMEs, IMPAWATT, STEEP, and EE4HORECA (where relevant).

The toolkit's main objective is to provide selected chambers and commodity exchanges representatives with a practical set of updated questions and analytical tools to be used with pre-identified Turkish SMEs. It supports chambers and commodity exchanges in:

- Raising awareness of technical aspects of energy efficiency,
- Identifying success factors and barriers,
- Providing diagnostic checklists for SMEs to assess their current energy practices,
- Enhancing corporate policies and formulating concrete recommendations for improving energy performance.

An in-person training was organized on 11–13 June 2025 at TOBB premises in Ankara, Türkiye, with the participation of 25 executives from Turkish chambers and commodity exchanges. The training was delivered by a network of European experts, in close coordination with Eurochambres.

Participants received practical guidance on using the new toolkit and learned how to conduct "energy visits" within SMEs, following best practices from EU chambers and commodity exchanges. The programme combined theoretical sessions with interactive exercises and mentoring components.

The training programme included:

- Hands-on sessions on the use of the TEBD II Energy Efficiency Toolkit;
- Guidance on assisting SMEs in designing and monitoring energy efficiency actions;
- Workshops and mentoring sessions to prepare participants for conducting on-site SME visits.

The initiative also aimed to develop a network of "Energy Efficiency Ambassadors" within local chambers and commodity exchanges. These 25 trained participants followed this activity by acting as multipliers and providing coaching to local companies, supporting them in reducing energy consumption, and promoting awareness of energy efficiency at local, national, and international levels.

The programme concluded with a certification ceremony recognizing the participants' successful completion of the training and their role as Energy Efficiency Ambassadors.

Module 2 – Webinar: ''Financing Opportunities for SMEs in Energy Efficiency Investments'' (17 July 2025) – 150 participants

The webinar brought together a wide range of institutional experts and practitioners to discuss funding mechanisms and support schemes for SMEs on their path to energy efficiency and green transition. Presentations covered a variety of national and international financial instruments, including:

- Public funding and incentive schemes presented by the Ministry of Energy and Natural Resources,
- The SOGREEN Project and its support mechanisms for energy efficiency (Ministry of Industry and Technology),
- KOSGEB's Green Industry Support Programme and its application process,
- TÜBİTAK grant opportunities for energy efficiency research and innovation,
- GEFF Türkiye's energy efficiency approach and financial tools,
- The ESCO Model, presented by EYODER, as an innovative solution for financing renewable energy and energy efficiency investments.

The session concluded with an interactive Q&A and closing discussion, allowing participants to engage with speakers and explore concrete pathways to financing energy efficiency initiatives in Türkiye.

Module 3 – Follow-up Training: ''Energy Investments for Sustainable Growth: A Toolkit and Real-Life SME Success Stories'' (3 September 2025) - 24 Participants

The second training session of the TEBD II Energy Efficiency Support Programme, held online on 3 September 2025 via Zoom, was specifically designed to address the questions of Energy Efficiency Ambassadors. The session focused on practical guidance for implementing energy efficiency measures in SMEs using the adapted TEBD II Toolkit.

The first part of the training provided an in-depth introduction to the adapted Toolkit, revised Menu Card checklist, and 2025 questionnaire, guiding participants on how to conduct energy visits and support SMEs in improving energy efficiency. Presenters included Asuman Sönmez (TEBD II Local Expert, Türkiye), Geoffrey Saliba, Claudia Julius and Istvan Szabo (TEBD II EU Experts), who shared step-by-step guidance for using the tools and monitoring SME performance.

The second part highlighted real-life success stories from various sectors, including food production, metal fabrication, hospitality, and textile industries. Case studies, such as REEValue Sammontana, illustrated practical lessons, challenges, and effective practices in energy-efficient improvements. The webinar concluded with an interactive Q&A session, reinforcing the role of TEBD II Energy Efficiency Ambassadors in supporting SMEs, facilitating access to energy efficiency measures, and promoting sustainable business practices across Türkiye.

Section 5
Tools Provided and Research Methodology

Toolkit Developed

The original checklist contained 195 action items across 10 categories (on a single worksheet). The extended version contains 483 action items across 22 categories (on separate worksheets, +148%).

The first checklist developed as part of the TEBD I energy outreach was based on that developed by the HORIZON STEEEP Project, a project managed by Eurochambres: a 3-year project started in 2017, that has helped 600 SMEs in 10 European countries to implement energy management strategies to become more energy efficient. The revision of the checklist as part of TEBD II therefore represents a continuation in the development and use of tools forming part of 3 consecutive EU funded projects aimed at supporting over 1,000 SMEs in 10 European countries and Türkiye.

The revised checklist under TEBD II is attached **(Annex 1)**, while below table summarises the key changes made to the TEBD I checklist.

Table 1
Expansion of Existing Categories (195 → 230 items, +35 new)

Category	Original	Extended	Δ
A - Energy Management	33	43	+10
B - Heating / Boilers	17	20	+3
C - Steam	23	26	+3
D - HVAC	17	20	+3
E - Compressed Air	34	37	+3
F - Refrigeration	18	22	+4
G - Lighting	17	19	+2
H - Electrical / IT	14	17	+3
I - Buildings	16	19	+3
K - Renewables (RES)	3	7	+4

Table 2
New Industry-Specific Categories (+12 worksheets, 253 items)

New Industry	Items
L - Furniture	29
M - Food Process	34
N - Chemicals	18
O - Wood Industry	16
P - Paper & Packaging	40
Q - Livestock	14
R - Maritime / Port	15
S - Energy Distribution	10
T - Pharmaceutical	13
U - Soap Products	10
V - Iron & Steel	12
X - Textile	42

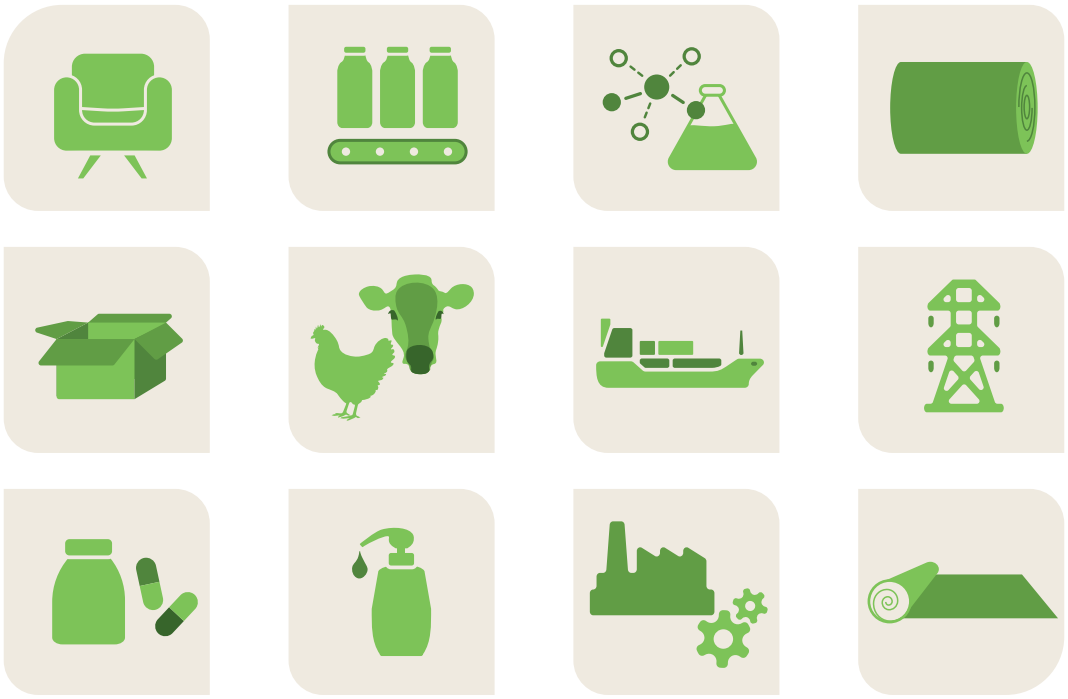


Table 3
Key Thematic Innovations – Detailed Breakdown

Thematic Innovation	Details and Examples
AI & Digitalisation	Digital Twin and AI integration to optimise manufacturing processes (A.1.16); AI-based Building Management Systems (BMS) for building energy management (A.3.3); IoT sensors and real-time monitoring for emissions and consumption tracking (E.1.2, X.9.1); predictive maintenance with ML algorithms (P.5.3); digital steam system control (C.3.6); intelligent energy management in textiles (X.1.5) and pharmaceuticals (T.2.1).
Innovative Thermal Technologies	Phase Change Materials (PCM) in solar water heating (B.1.2) and cold chain logistics (F.1.2); eutectic cooling technology (F.1.4); heat pump + solar collector combined solutions for heating and DHW production (B.3.7, I.1.6); two-stage cascade refrigeration system with natural refrigerant (F.3.4); ORC (Organic Rankine Cycle) for waste heat recovery (N.3.1, P.1.10).
Strategic Approach Shift	Formal development of energy management policy and plan (A.1.3–1.4); LCOE (Levelized Cost of Energy) instead of CAPEX-based thinking – full lifecycle cost matters (A.1.30); PPA (Power Purchase Agreement) contracts for long-term energy supply security and price hedging (A.1.11, K.1.2); ESG strategy development for short and long term (K.1.3).
Sustainability & Circular Economy	Waste-to-energy conversion (L.4.10, P.4.2); biomass utilisation from food processing by-products (M.5.3) and biogas from livestock manure (Q.3.3); lean manufacturing and Value Stream Mapping (L.4.8, O.4.3–4.4); modular product design to extend lifespan (L.4.11); water recycling with CIP systems (M.6.2); energy storage system installation (K.3.2); packaging material minimisation (L.4.7, P.5.8).
Industry-Specific Deepening	The 12 new worksheets contain tailored actions for key European industries: food processing pasteurisation alternatives (M.3.1–3.4); paper industry shoe press and cold-blow technologies (P.2.2, P.2.11); iron & steel hydrogen-based DRI (V.2.2) and CDQ (V.3.5); textile process optimisation from spinning to finishing (X.2–X.8); port cold ironing and microgrids (R.1.3, R.1.6); chemical electrification and membrane technology (N.2.1, N.3.3).
Maintenance, Training & Incentives	Monthly energy usage data reporting to staff (A.2.7); incentive programmes (A.2.4 – rewards, team-building events funded from savings); emphasis on life-extending impact of regular maintenance (A.2.9, L.5.1); programmable thermostats and intelligent controllers (D1.5, D1.8); importance of solar panel maintenance (K.3.1); routine equipment maintenance in livestock farming (Q.3.4).

Research Methodology

The questionnaire used as part of the TEBD I outreach formed the basis of the TEBD II survey. This allowed for a comparison of data between the two projects, and while appreciating that the respondent cohort represented almost exclusively new regions in Türkiye, and that the respondent profile was likely to change, it was nevertheless considered valuable to have comparable data. The questionnaire structure remains unchanged (9 sections), but the number of questions grew from **26 to 42 (+62%)**. The expansion focuses on existing renewable capacity assessment, smart metering, ESG strategy, KPI usage, and building energy renovation plans.

The survey is designed to provide chambers and commodity exchanges with in-depth and comprehensive information about businesses' energy practices, opportunities, and the obstacles they face. The questions forming the survey are in Appendix 1, and the analysis of the responses is provided in Section 5A of the report.

The purpose of the survey is to gather information on energy management, efficiency, renewable energy sources and financing based on the most up-to-date (2024–2025) information available. This survey can also be used to help chambers and commodity exchanges determine their strategies on energy efficiency, including policy recommendations, support programmes, and financing needs and barriers.

The survey was developed by three EU energy experts appointed by TEBD and translated into Turkish by the Turkish local energy expert. English and Turkish online surveys were created using the Survey Monkey application, and the access link was sent to participating chambers and commodity exchanges. Each chamber and commodity exchange shared the survey with a varying number of businesses (mostly SMEs) participating in energy efficiency activities and/or selected by Energy Efficiency Ambassadors. Data collection was completed between 13 October 2025 and 9 February 2026.

This study is based on a data collection process lasting approximately four months. The survey questions were completed and validated by 254 companies. However, as not the same number of companies responded to each question, the distribution of responses varies depending on the question. In addition, the online database contains entries that were completed to varying degrees but were not validated with the special code sent to the participating chambers and commodity exchanges. To prevent the counting of trial or invalid responses, these responses were excluded from the analysis, even if the survey was almost complete. The sample size is sufficient to allow for statistically meaningful conclusions. The time frame demonstrates that the results reflect current market conditions.

The data used in this study was collected through a structured survey administered to the target audience. The survey form included Likert scale rating questions to measure participants' opinions, perceptions, and practices; multiple-response questions where more than one option could be selected; dichotomous questions with a two-category response structure *(e.g., Yes/No)*, closed-ended questions with three or more categories (e.g. Yes/No/Partially), and open-ended questions allowing participants to express their views freely. The data obtained was checked prior to analysis, with incomplete or inconsistent records reviewed. Frequency and distribution analyses were then performed for quantitative questions, and cross-tabulations were created. Open-ended questions were classified thematically according to their content and interpreted. This approach aimed to enable the simultaneous evaluation of both numerical trends and participant opinions.

The data analysis was completed by the four energy experts appointed by TEBD, after which this report was prepared.

The survey questions are included in **Annex 1**. For questions triggered by previous answers, percentages represent the proportion of participants who reached and completed that specific item, rather than the total study population. The survey results are explained and analysed in the sub-sections that make up the Survey Analysis section.

Furthermore, in order to compare the overall picture of Türkiye in terms of energy management, efficiency, renewable energy sources and financing during the interpretation of the survey results, a comparative analysis was conducted using data collected in 2021 and published in the TEBD I report titled "Energy Efficiency 2022".

Table 4
Section-by-Section Comparison

Section	Original	Extended	Δ	Key Changes
1. Demographic Information	0	0	–	Sector options expanded (+2: Food processing, Renewables)
2. Basic Energy Situation	7	8	**+1**	New: KPI usage (kWh/tonne, /guest night, /m², /employee)
3. Use of Consultancy/ Audit	4	5	**+1**	New: ESG strategy; existence of energy efficiency programme
4. Energy Efficiency Measures	2	4	**+2**	Clearer structure; separated yes/no branches
5. Renewables	2	5	**+3**	Major expansion: existing RES assessment, storage, PPA, payback tolerance
6. Supplier Switching	2	6	**+4**	New: smart metering, data provision, frequency, heat pump meter
7. Building Implications	4	7	**+3**	New: EE renovation plans, separate meters, separate consumers
8–9. Business Case	4	6	**+2**	New: tracking and use of subsidy programmes
10–12. Support	1	1	–	Unchanged
Total	**26**	**42**	**+16**	**+62% increase**

Power Purchase Agreements Guidelines

Based on discussions had during the meetings in Ankara, between the visiting EU experts and Turkish chamber and commodity exchange representatives, guidelines were prepared to support SMEs in reaching Power Purchase Agreements. The document, attached under Annex 2 "Power Purchase Agreements in Türkiye: A Practical Guide for Small & Medium-Sized Enterprises" outlines how Turkish SMEs can utilize Power Purchase Agreements (PPAs) to mitigate energy cost volatility while meeting sustainability goals. A PPA is a long-term contract, typically lasting 10 to 20 years, between an electricity generator and a buyer to purchase power at a pre-agreed price. This arrangement provides price certainty for SMEs, protecting them from the historically volatile Turkish industrial electricity tariffs, which are influenced

Table 5
Key Content Innovations – Detailed Breakdown

Area	Detailed Description
Renewables (Section 5)	**The most significant expansion**. The original only asked about future plans; the new version assesses existing RES capacity (installed power in kW, energy fed into the grid, self-consumption ratio). New options: small-size wind turbines and hydrogen. Dedicated questions on energy storage systems, payback tolerance (2–15 years scale), and PPA (Power Purchase Agreement) plans.
Smart Metering & Data (Section 6)	**Entirely new area**. Questions on the application of smart metering, availability of consumption/load data from DSOs or energy suppliers, data frequency and resolution (daily/monthly), and whether heat pumps have separate electricity meters. These serve to assess data-driven energy management readiness.
ESG & Strategy (Section 3)	**Two new questions:** whether the company has a formal energy efficiency programme, and whether it has an ESG (Environmental, Social, Governance) strategy. This reflects the growing importance of sustainability reporting and standards (e.g. Corporate Sustainability Reporting Directive (CSRD)).
Building Energy (Section 7)	**New**: specific EE investment plans during renovations (window/door replacement, external thermal insulation, heating/cooling modernisation, smart building design, renewables). Questions on whether separate energy meters and consumers exist per premises. "Workshops" added as a new site type.
KPIs & Monitoring (Section 2)	**New question**: whether the company uses energy performance indicators (kWh/tonne of product, kWh/hotel night, kWh/m², kWh/employee). This forms the basis for measuring energy intensity and enabling benchmarking across sectors.
Subsidy Awareness (Sections 8–9)	**Two new questions**: whether the company tracks available subsidy programmes, and if so, whether it uses them for purchasing machinery and equipment. This aims to assess awareness and utilisation of financial support mechanisms.

by currency depreciation and import dependency. The guide details various PPA structures suitable for SMEs, including on-site (behind-the-meter) installations, off-site deliveries via the national grid, and aggregated PPAs where multiple SMEs pool their demand to secure better terms.

A central theme of the guide is the "Energy Efficiency-First Principle," which strongly advises SMEs to conduct formal energy audits and implement efficiency measures before sizing and signing a PPA. Combining these strategies ensures that the SME does not contract for more energy than necessary, thereby maximizing financial benefits. Furthermore, the guide highlights the growing importance of green credentials, such as I-RECs (International Renewable Energy Certificates), which can be acquired through PPAs. These certificates are becoming crucial for Turkish SMEs to meet supply chain sustainability requirements and to remain competitive under the EU's Carbon Border Adjustment Mechanism (CBAM).

Best Practices from EU-funded projects

During the meeting in Ankara selected energy efficiency projects funded by the EU Life programme were presented. These projects are providing platforms, tools and services for SMEs that could be interesting for the attendees of the energy ambassador training.

The project Energy Efficiency for SME (EE4SME) coordinated by Eurochambres includes 23 project partners from 10 European member states. It was running for 3 years and ended by 2025. The project focused on the sectors accommodation and food services, agri-food and metalwork. It aimed at identifying energy efficiency potentials through energy audits, enhancing the skills of energy managers within SMEs by webinars as well as improving their know-how to access public incentives and private finance. The project used the energy efficiency knowledge platform for companies Impawatt that is available in 12 countries.

Within the project different activities were planned, starting with a scoping study to identify effective energy efficiency measures according to the different sectors targeted by the project. These measures were used as a guideline for the selection of companies to be audited and for the capacity building of companies. In each country three webinars for SMEs were organised to train them on different aspects and technologies of energy efficiency, e.g. on energy management and best practices in energy efficiency.

The Impawatt platform offers more than 200 information materials and tools that can be selected according to different sectors. All presentations of the EE4SME webinars are also available on the platform. Moreover, Impawatt provides the possibility of a self-assessment for companies as well as a financial tool to find customized funding opportunities fitting to the energy efficiency projects of companies. The platform was introduced to the TEBD II energy ambassadors in detail followed by an interactive training session as group exercise.

As an example of a project that should enhance energy efficiency on value chain level, the project Energy Efficiency for HORECA- EE4HORECA (Hotels, Restaurants, Catering Services) was presented. The project is also coordinated by Eurochambres and includes 12 partners from 6 countries. The project aims at increasing the uptake of energy efficiency measures and the use of renewable energy within the HORECA value chain that is one of the energy intensive sectors. The project's activities include capacity building by workshops, webinars and a knowledge platform on energy efficiency linked to the IMPAWATT platform; which was generated under another EU funded project, as well as assistance by energy experts accompanying companies on their way to energy efficiency improvement.

The Energy Efficiency Hub for SMEs, another online platform was developed from scratch during the EE4HORECA project. To date, the hub is introducing 18 projects funded by the EU LIFE programme or other European funding schemes. For each project the hub provides a brief introduction and direct access to their respective websites and resources in the services and materials section. Thus, beyond information, the Energy Efficiency Hub is designed to encourage action. Visitors can discover practical tools, best practices, training opportunities, and services that support energy efficiency and renewable energy investments, particularly for SMEs.

The Audit to Measure **project** coordinated by RSE, Italy, with 9 partners in 9 countries is targeting SMEs mainly in the sector of machinery and equipment manufacturing with the aim of supporting companies in the uptake of energy efficiency measures identified in energy audits. To this aim Audit2Measure has developed an engagement strategy called Audit2Action to tackle energy efficiency potentials that emerge from energy audits and to overcome barriers through the understanding of decision-making processes in companies. Audit2Measure has developed a capacity building program and provides a "Knowledge Exchange Space" for professionals in companies including an Energy Saving Measures Database with filter engine for sector, country, technology, company size with examples of implemented energy saving measures.

ENERGIZE **project** coordinated by IRIS Technology Solutions, Spain, with 9 partners in 6 countries aims to demonstrate the feasibility of cooperative energy models in industrial zones and industrial renewable energy communities. The target of the cooperation approach is to achieve significant carbon reductions and renewable energy generation increase by training and skills development for SMEs in pilot regions using training and capacity building tools available in a Digital Hub. To ensure the replicability to create further industrial and renewable energy communities, the hub is accessible for professionals interested in energy communities and collaborative energy models, benefitting from the experiences gained in four pilot regions.

During the online webinar in September 2025, additional best practices in energy efficiency improvement of companies collected within several European LIFE projects were presented – these are included as **Annex 3**. Different sectors and technologies were addressed. Some examples of best practices that were presented are energy and water automation systems in hotels including sensors and displays on room level with a central monitoring control unit, PV plants, energy efficient chillers and refrigerators, new machinery with inverters and heat recovery in ventilation systems.

Section 6
Analysis of Survey Data

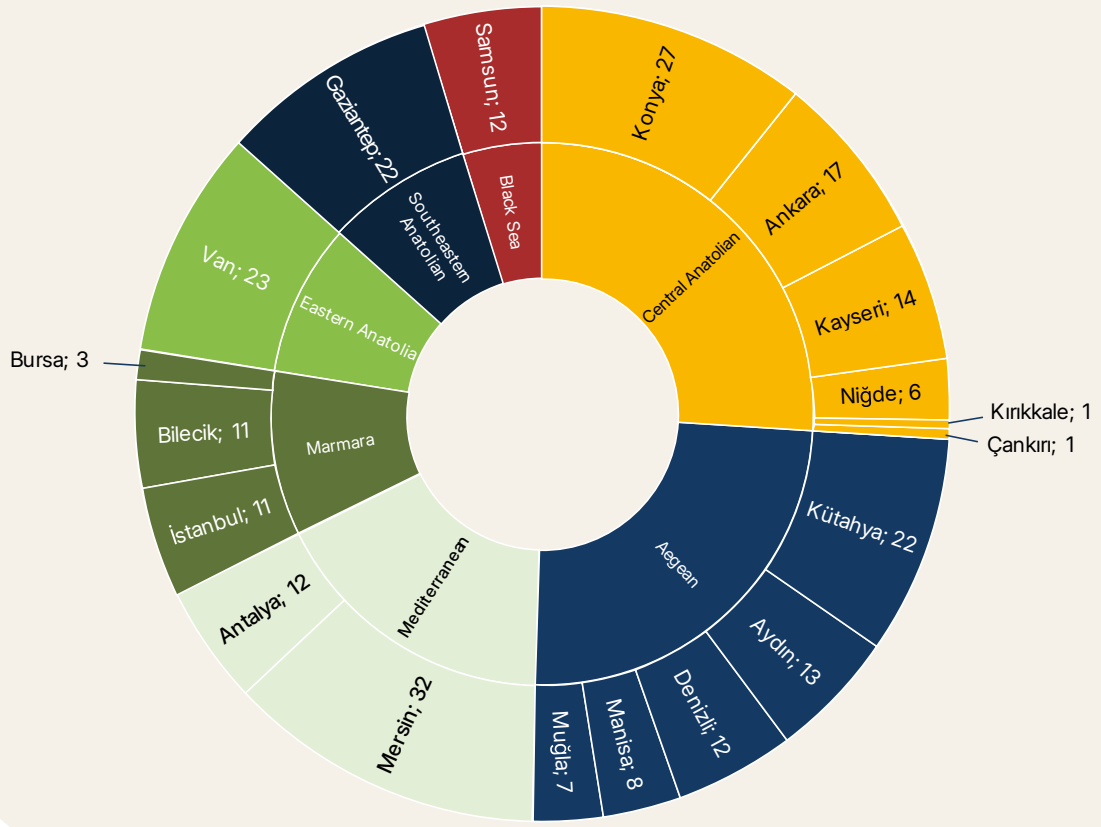
A. General Information

Geographical Distribution

The companies participating in the survey are firms operating in different regions of Türkiye. The regional distribution of these companies and the cities in which they operate are also shown. Of the 254 companies that responded, a total of 66 companies were established in the Central Anatolian region (Konya, Ankara, Kayseri, Niğde, Çankırı (1 company)), Kırıkkale (1 company), 62 companies in the Aegean region (Kütahya, Aydın, Denizli, Manisa, Muğla), 44 companies in the Mediterranean region (Mersin, Antalya), 25 companies in the Marmara region (İstanbul, Bilecik, Bursa (3 companies)), 23 companies in the Eastern Anatolia region (Van), 22 companies from Southeastern Anatolian region (Gaziantep) and 12 companies in the Black Sea region (Samsun) participated to the survey.

82 companies from Mersin (32 companies), Konya (27 companies) and Van (23 companies) account for 32.3% of the total responses.

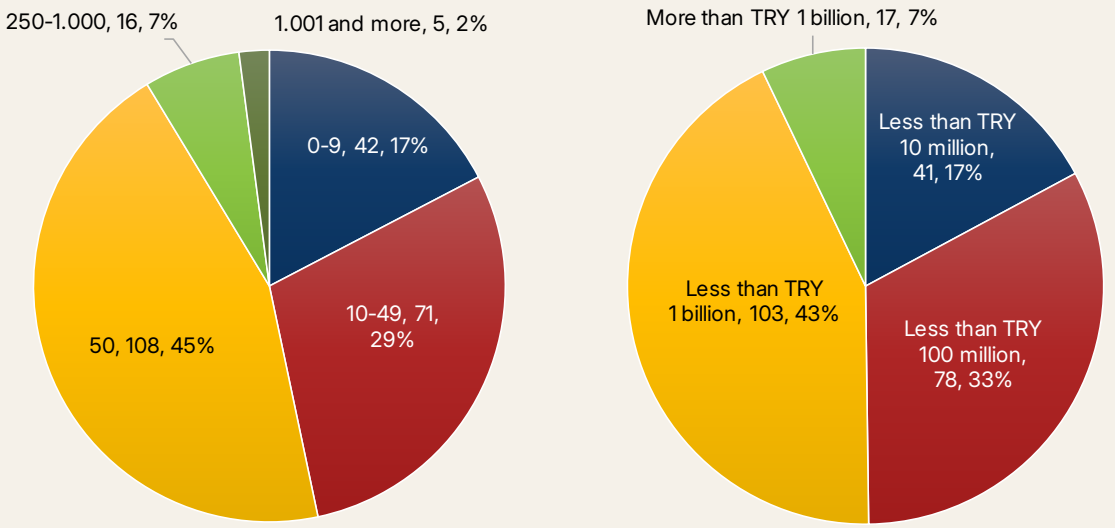
Graphic 1
Distribution of Companies by Region and City (2026)



Company Size

Most of the businesses participating in the survey are small or medium-sized enterprises operating within the scope of Türkiye's SME definition[1]. The responses of large-scale businesses were also included in the analysis. When evaluated in terms of "Number of Employees" and "Annual Net Sales Revenue," companies with fewer than 250 employees and annual net sales revenue not exceeding 1 billion Turkish Lira (TRY) fall within the SME category. As can be seen from Graphic 2, only 7% of the 242 companies that answered the "Number of Employees" question and the 239 that answered the "Annual Net Sales Revenue" in 2024 question are companies that do not fall within the SME category.

Graphic 2
Companies' Number of Employees and Annual Net Sales Revenue in 2024 (2026)



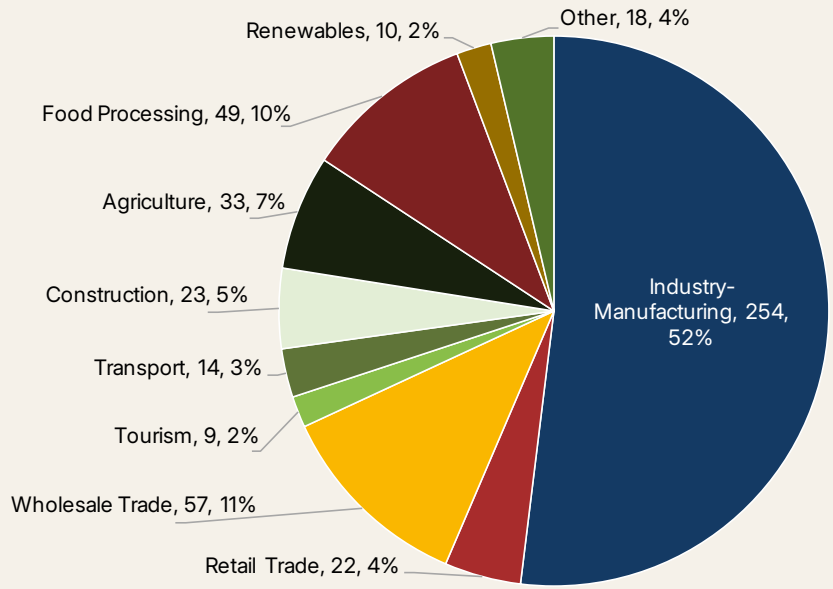
Companies were also asked whether they were members of KOSGEB. Of the 240 companies that answered the question, 202 stated that they were KOSGEB members, while 38 stated that they were not members.

1 https://www.kosgeb.gov.tr/site/tr/genel/detay/9276/kobi-tanimi-guncellendi-daha-fazla-isletme-kamu-desteklerinden-yararlanabilecek

Sector of Activity

More than 50% of the 254 companies participating in the survey are businesses operating in the industrial sector, and as shown in Graphic 3, the proportion of this sector is 52%.

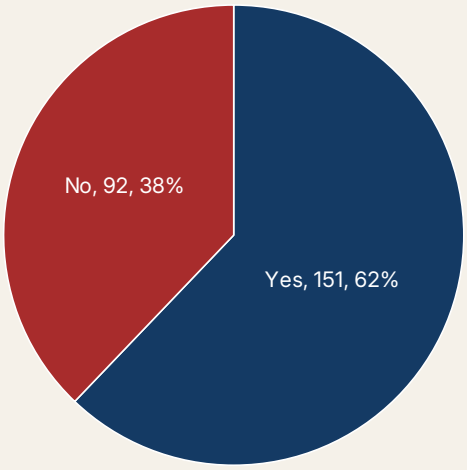
Graphic 3
Sectoral Distribution of Companies



Exports

As shown in the Graphic 4, 62% of the 243 companies that answered the survey question about exports indicated that they export.

Graphic 4
Export Status of Companies (2026)

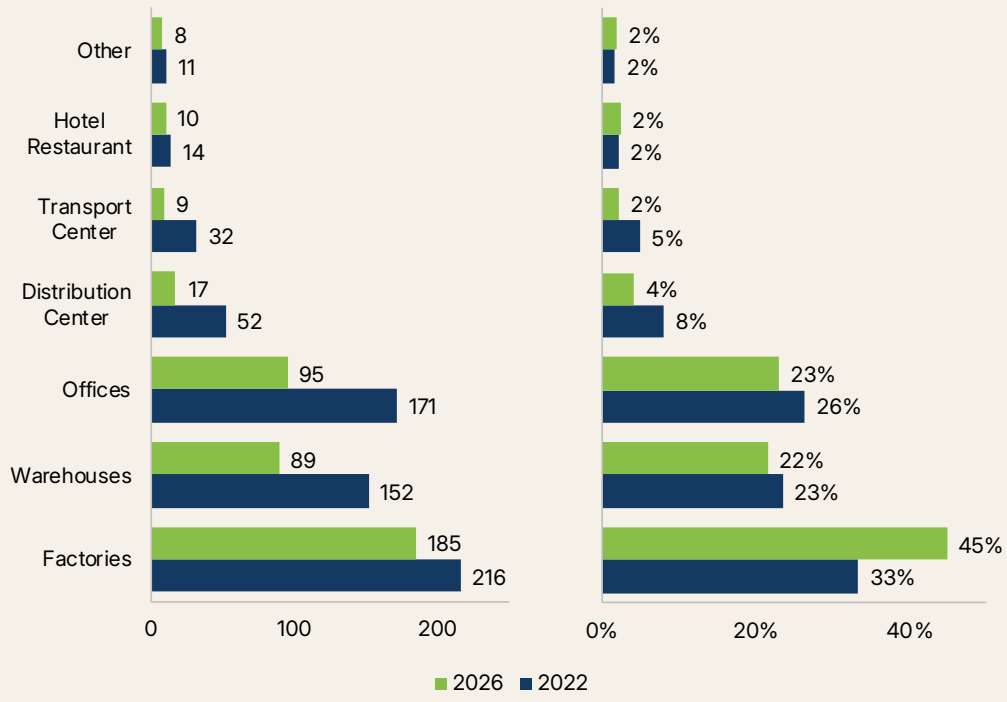


In terms of exports, European Union countries, particularly Germany and France, the United Kingdom, the United States, Russia, and African countries rank highest. The profile of exporting companies is also covered in the subsequent sections of the report.

Type and Number of Sites

The graph below shows the distribution of facility types among companies, compared with 2022 data. As shown in the Graphic 5, the main facility types are factories, warehouses, and office buildings. When compared with 2022 data, similar values are seen for warehouses, offices, hotels, restaurants, and others.

Graphic 5
Companies Facility Type and Number (2022-2026)



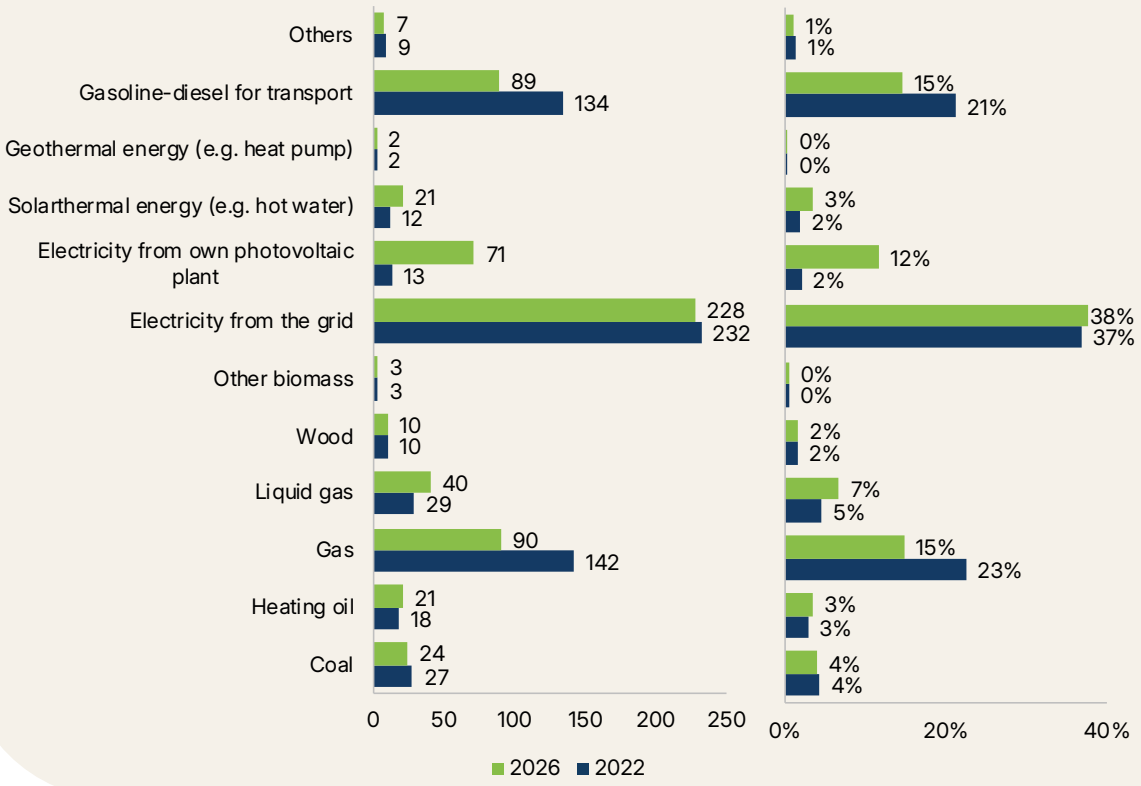
B. Basic energy situation

Energy Sources Used

Companies utilise different energy sources depending on their activities. In general, the most used energy sources are grid electricity, natural gas, and petrol or diesel for transport. However, the number of solar power plants is increasing day by day, and companies are becoming self-sufficient in energy production. Rising energy and fuel prices have a significant impact in this regard.

Graphic 6 shows the responses of 228 participants who answered the question about the type of energy they use. In this question, where multiple options could be selected, the use of grid electricity appeared in similar numbers and proportions in both the 2022 and 2026 data.

Graphic 6
Types of Energy Used by Companies (2022–2026)

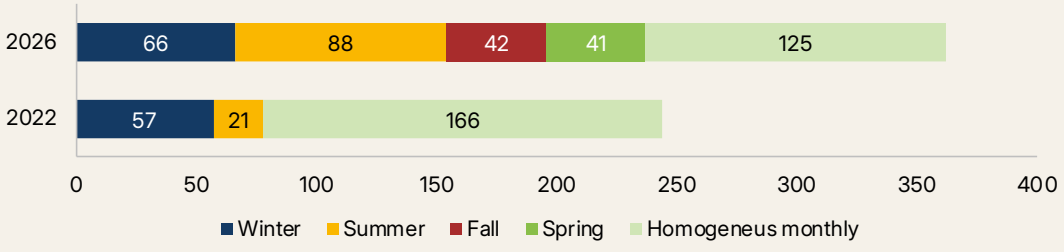


In 2026, both the number and proportion of those consuming electricity from their own solar power plants increased compared to 2022. No significant development was observed in biomass, another type of renewable energy, between the years.

Energy Consumption Profile

Almost all the companies participating in the survey are active for most of the year and therefore require energy throughout all seasons. Twenty-nine companies stated that they only operate in winter, 41 only in summer, while 125 reported relatively homogeneous energy consumption across months.

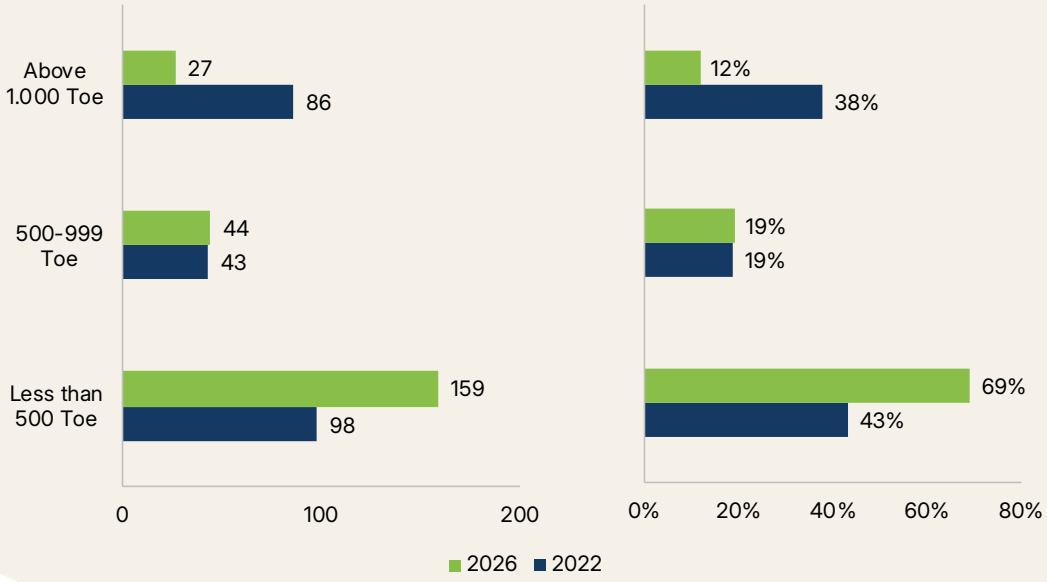
Graphic 7
Distribution of Companies' Energy Consumption by Season (2022–2026)



Total Energy Consumption

Energy consumption varies depending on the sector and scale of the companies. Of the 230 companies that responded to the energy consumption question, 69% stated that their energy consumption was below 500 Toe (tonne of oil equivalent). Compared to the 2022 data, a higher proportion of companies responding to the survey in 2026 will have energy consumption below 500 Toe, and a very small proportion will have energy consumption above 1.000 Toe.

Graphic 8
Companies' Energy Consumption (2022–2026)



Commercial and Service Building Owners and/or Managements with Annual Energy Consumption of 500 Toe or above or Usage Area ≥ 20,000 m² are required to appoint an energy manager in accordance with the Energy Efficiency Law No. 5627.[2] Therefore, the support available to companies and their obligations vary depending on the amount of energy consumed.

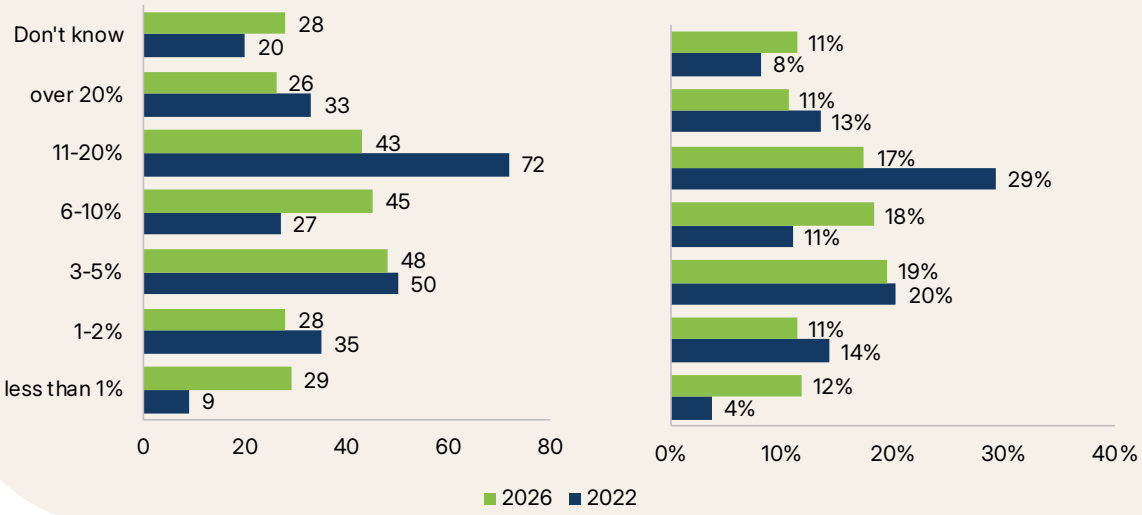
"In order to encourage long-term investments by industrialists, investments aimed at energy efficiency, designed to achieve at least a 15% energy saving compared to the current situation, to be carried out in existing manufacturing industry facilities with an annual minimum energy consumption of 500 Toe, based on the project approval to be given by the Ministry of Energy and Natural Resources of the Republic of Türkiye, which are designed to achieve at least a 15% energy saving compared to the current situation, are eligible for the incentives provided for investments in the fifth region, regardless of the region where they are to be made. The incentives available include value-added tax exemption, customs duty exemption, tax reduction, employer's share of insurance premium support, interest support, and investment site allocation." (Türkiye's Ministry of Energy and Natural Resources)[3]

2 https://www.kosgeb.gov.tr/site/tr/genel/detay/9276/kobi-tanimi-guncellendi-daha-fazla-isletme-kamu-desteklerinden-yararlanabilecek
3 https://enerji.gov.tr/bilgi-merkezi-enerji-verimliligi-destekleri

Energy Costs

Energy costs are a significant factor putting serious pressure on the profitability of companies operating in all sectors, particularly due to rising energy and fuel unit prices. Although energy costs are so important, the fact that a significant proportion of companies are still unaware of their costs also negatively affects both cost calculations and profitability analyses.

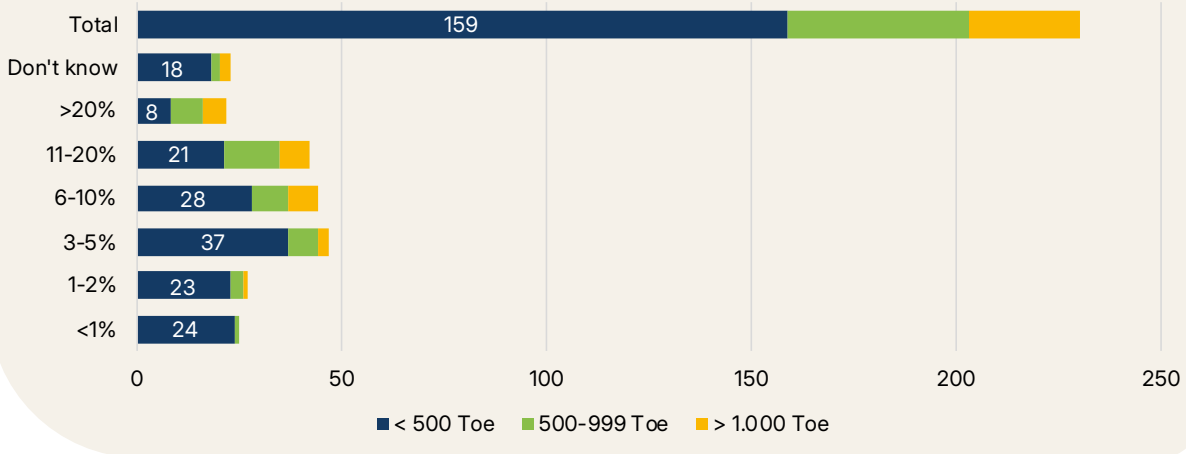
Graphic 9
Companies' Energy Costs as a Share of Total Costs (2022–2026)



As shown in Graphic 9, where 247 companies responded to the question "What is the share of energy costs in your total costs?", 11% of companies are unaware of their costs. A noteworthy situation is that the number of companies answering "I don't know" is very low among those with annual net sales of 1 billion TRY and above.

When comparing the share of energy costs to annual energy consumption levels, companies with energy costs between 3% and 5% have energy consumption levels below 500 Toe. As shown in Graphic 10, 69% of all responding companies also consume energy below 500 Toe.

Graphic 10
The Share of Companies' Energy Costs in Total Costs and Annual Energy Consumption



When examining the relationship between the share of companies' energy costs in their total costs and the number of employees, we see that the ratio rises further in businesses with 250 or more employees, exceeding 6%. A similar situation is observed in companies with annual net sales of 1 billion TRY and above.

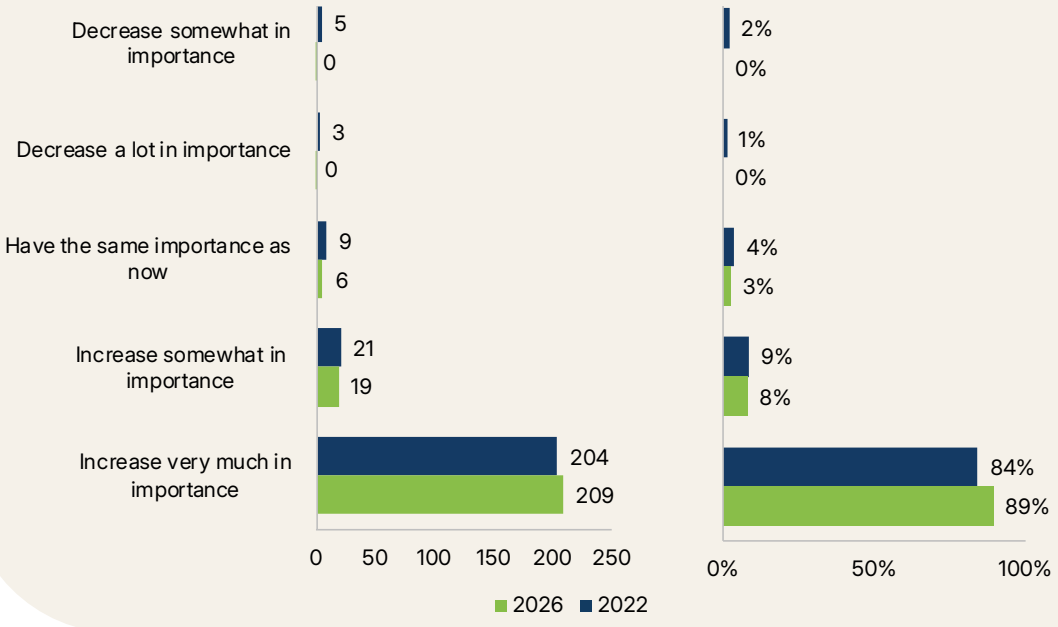
Another issue related to costs, which is particularly important in unit cost calculations, is whether companies use Key Performance Indicators such as kWh per tonne produced, kWh per hotel night, kWh per m2, or kWh per employee. 79% of the 240 companies that responded to the question indicated that they do not use these indicators.

Although Power Purchase Agreement (PPA) is one of the important solutions to decline or control the energy costs, based on the survey responses, a minority of participating companies indicated plans to establish a PPA while the majority reported that they are not planning to do so at this stage. Out of the total respondents, 77 companies stated that they are planning to make a PPA, whereas 136 companies indicated that they are not. These results suggest that although interest in long-term renewable electricity procurement mechanisms exists, the overall adoption or planning level remains limited among the surveyed companies. This may reflect existing regulatory, financial, or operational barriers, or a need for further awareness and capacity building regarding PPA mechanisms.

Future Expectations

The increase in inflation rates and the rise in energy unit prices, which are important indicators of the Turkish economy, especially after the COVID-19 process and the subsequent earthquakes, are negatively affecting energy costs and increasing pressure on profitability.

Graphic 11
Companies' Expectations Regarding Energy Costs (2022–2026)



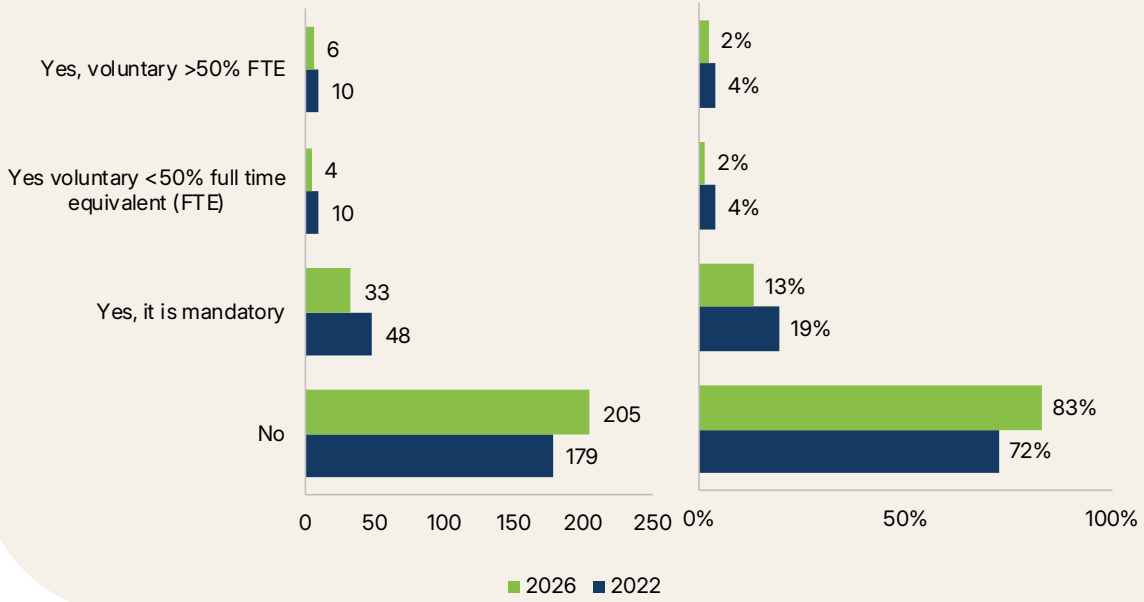
As can be seen in Graphic 11, there has been no significant change in company owners' expectations regarding energy costs over the last four years. Almost all of them predict that the importance of energy costs will increase significantly. However, the fact that they still do not know the share of energy costs in their total costs creates a contradiction. Similarly, the low number of companies with energy managers and those using energy management systems creates a contradiction, as they do not give the necessary importance to the issue they believe will become more important.

C. Energy Management

Energy Managers

In the 2026 report, 248 companies responded to the question "Does your company have a designated energy manager?", which received a similar number of responses in 2022, and it was stated that more than 80% of companies do not have an energy manager.

Graphic 12
Presence of Energy Managers in Companies (2022–2026)



Commercial and service building owners and/or management with an annual energy consumption of 500 Toe or more or a usage area ≥ 20,000 m^2 are required to appoint an energy manager under the Turkish Energy Efficiency Law No. 5627, the percentage of companies with an energy manager is below 20%.

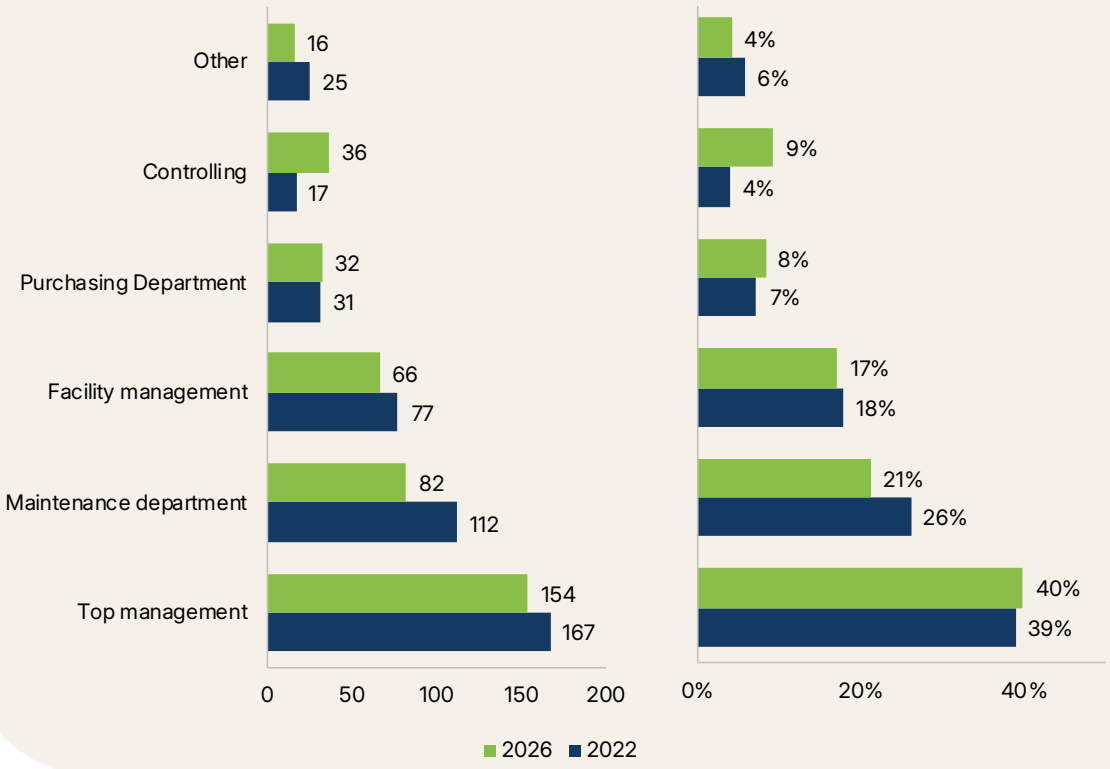
On the other hand, 144 companies with an annual energy consumption below 500 Toe do not have an energy manager, 2 have a voluntary <50% full-time equivalent energy manager, and 4 have a voluntary >50% full-time equivalent energy manager.

These figures indicate that companies are still not giving sufficient importance to the issue of energy, which is extremely important in terms of sustainability and profitability.

Energy Management Responsibility

According to the responses provided in both reports, energy management in companies is generally the responsibility of senior management. In second place are those responsible for the maintenance and repair of machinery and equipment. Graphic 13 shows a comparison of who is responsible in companies.

Graphic 13
Those Responsible for Energy Management in Companies (2022–2026)



In companies with an annual energy consumption below 500 Toe, senior management bears more responsibility (102 companies), while in those with consumption above 1.000 Toe, responsibility is shared between senior management, the maintenance department, and facility management. Similarly, as the number of employees increases, departmentalisation also increases, leading to a rise in the number of departments and employees responsible for energy management.

In addition to the different sections mentioned in the open-ended "Other" section, it is also noted that some companies outsource their energy management activities to external engineers or consultants.

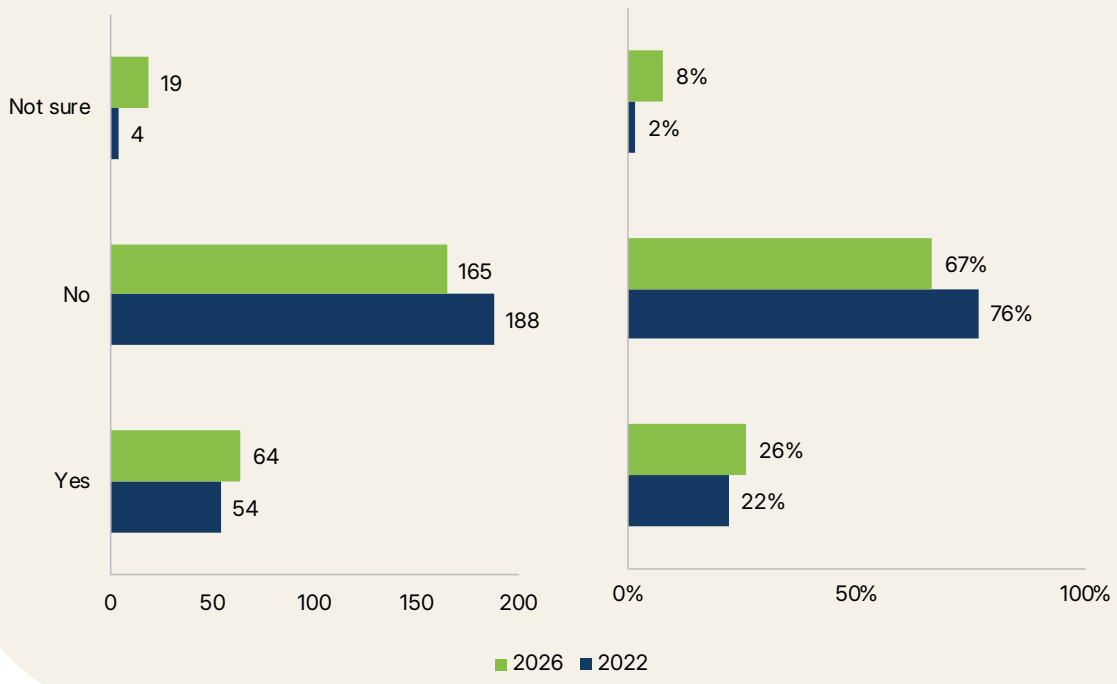
D. Energy Audits

The Prevalence of Energy Audits and their Focus Areas

The survey asked companies both "Have you had an energy (efficiency) audit/energy consultancy visit in the last 4 years?" and "In which areas was the audit conducted?"

Surveys conducted in 2022 and 2026 show that more than 65% of companies have not undergone any energy audit or consultancy visit, as seen in Graphic 14.

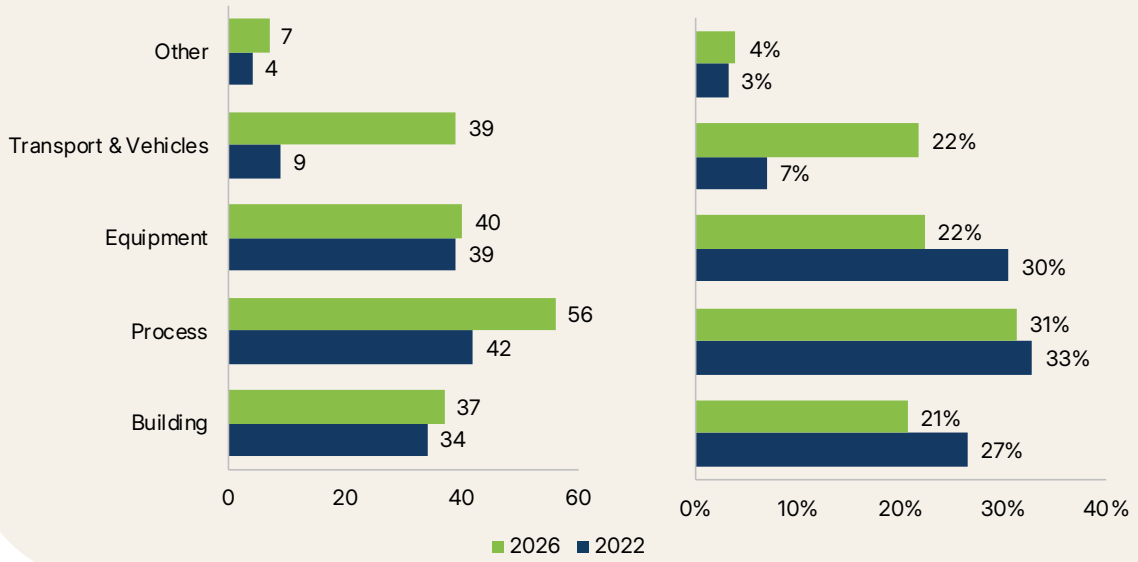
Graphic 14
Has your Company Undergone an Energy (Efficiency) Audit/Energy Consultancy Visit in the Last 4 Years? (2022–2026)



The fact that most companies answering "Yes" have annual net sales below 1 billion TL and are exporting companies, this provides insight into the profile of companies that prioritise energy audits.

Graphic 15 shows that process audits were more common among audited companies. An increase in audits related to transportation and vehicles is also observed in 2026.

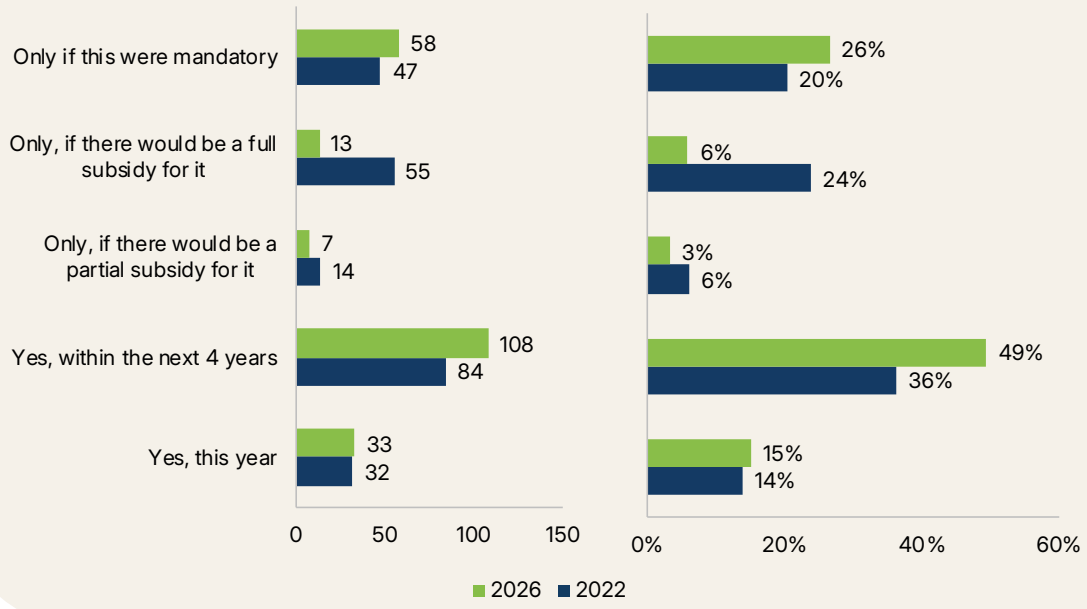
Graphic 15
Areas Subject to Audits (2022–2026)



Future Energy Audits

In both surveys, all participants were asked whether they planned to conduct an energy audit in the future. In the 2022 study, 50% planned to conduct another audit in the year the survey was conducted or within the next four years. In the 2026 study, nearly 65% gave the same answer.

Graphic 16
Do you Plan to Have an Energy Audit in the Future? (2022–2026)



As shown in Graphic 16, for companies responding in 2026, full or partial subsidies (support) appear to have lost their importance.

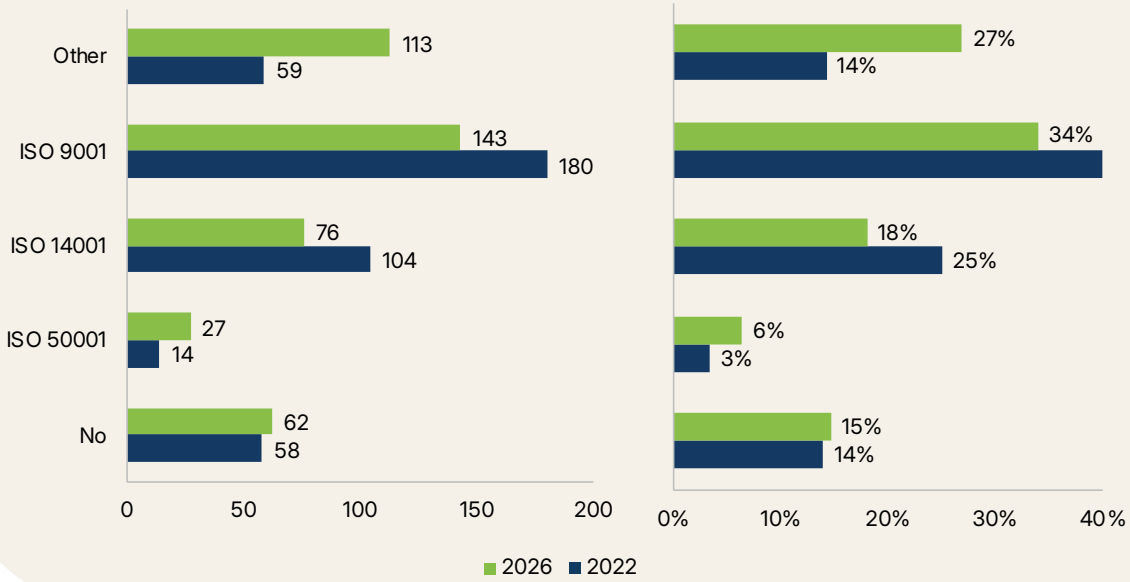
Of the companies that answered "no" to the question about energy audits and consultancy visits indicated on Graphic 14, 14 stated that they plan to have an energy audit carried out this year, 67 within the next four years, and 50 only if required to do so.

Energy Management Systems and Other Management System Certifications

Energy Management Systems are among the issues that companies do not consider important. Of the 251 companies that participated in the survey and responded to the question "Does your company use an energy management system?", 81% indicated that they do not use such a system.

Management system certifications are important documents for companies, particularly for accessing energy subsidies and exporting. In this context, companies were asked about the management system certifications they hold in the survey.

Graphic 17
Management System Certifications (2022–2026)



Graphic 17 shows that companies are more interested in ISO 9001 quality management system certification and ISO 14001 environmental management system certification. In contrast, the number of companies holding ISO 50001 energy management system certification, which is particularly relevant for energy, is not very high. However, it is possible to say that there is promising movement in this direction among companies in both studies. 46 companies without ISO 50001 certification plan to obtain it in the coming period.

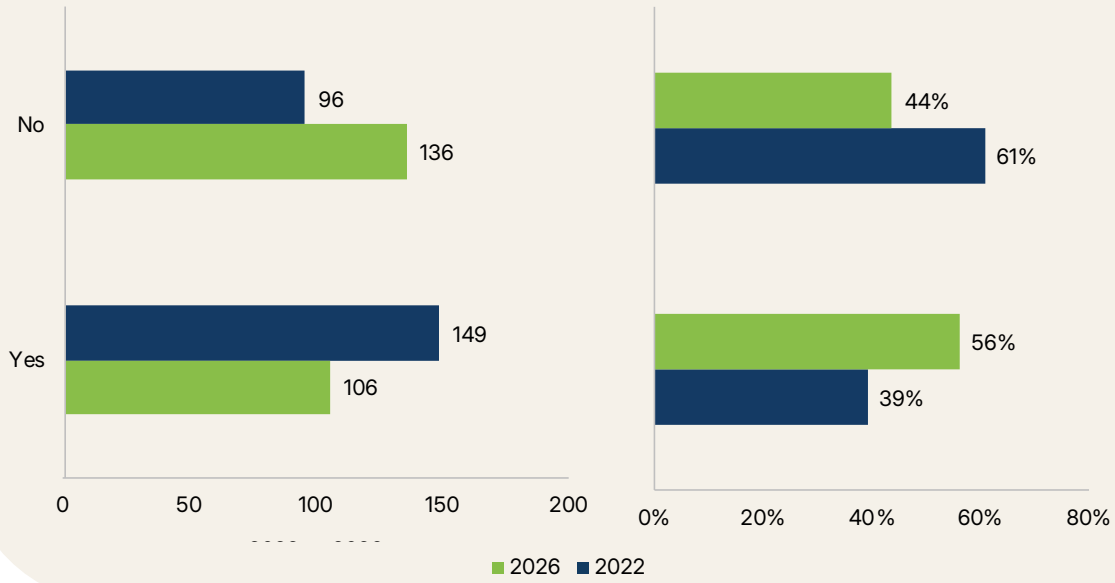
Quality management systems specific to certain sectors, such as food safety, are also frequently used, with 24 companies stating that they have ISO 22000 certification in 2026.

E. Energy Efficiency Measures

Energy Efficiency Measures Carried Out

As Graphic 18 shows the companies participating in the survey taken energy efficiency measures over the last four years.

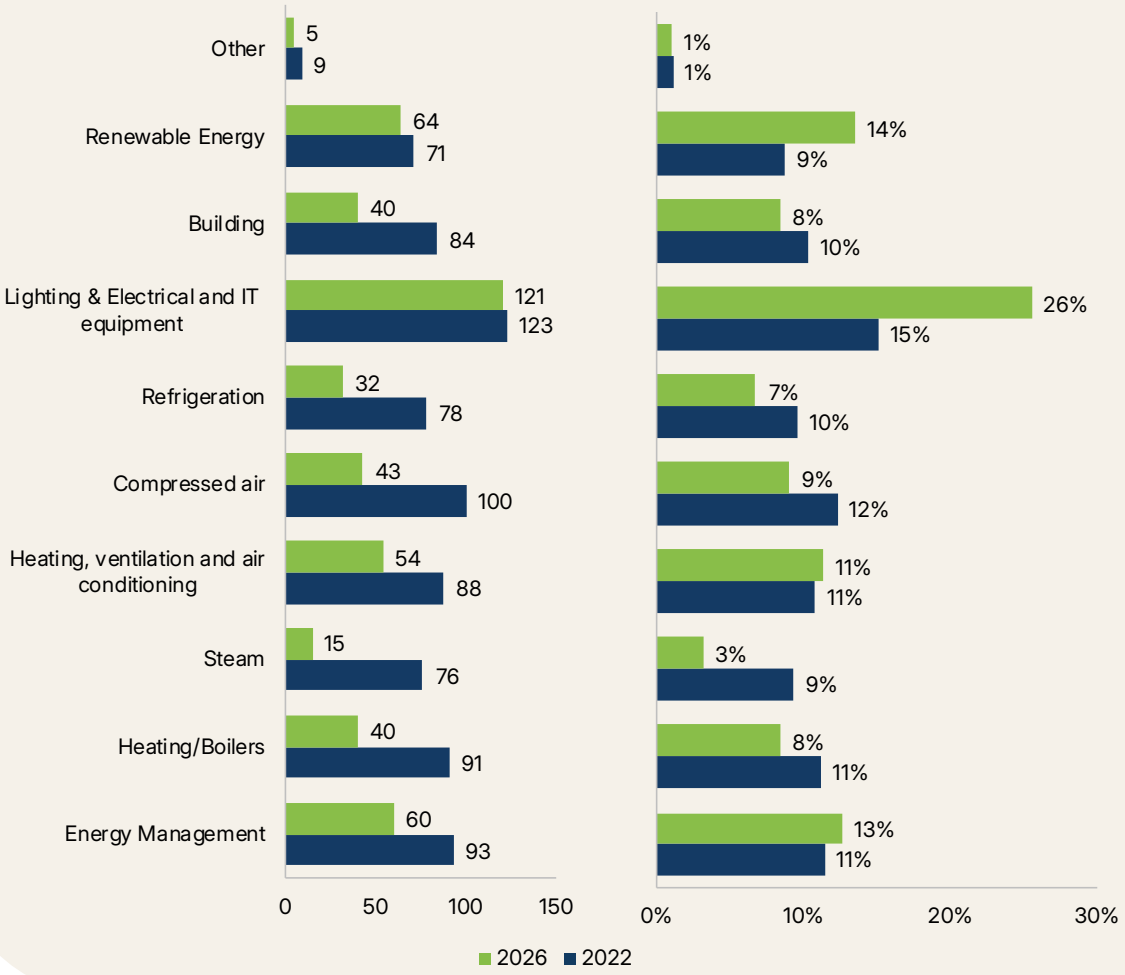
Graphic 18
Has your Company Taken Energy Efficiency Measures?



In 2026, the number and percentage of companies that have taken measures is higher than in 2022.

As shown in Graphic 19, measures related to lighting, electrical and IT equipment remain among the most frequently implemented measures, as they have been previously. In fact, their importance has increased even further in recent times.

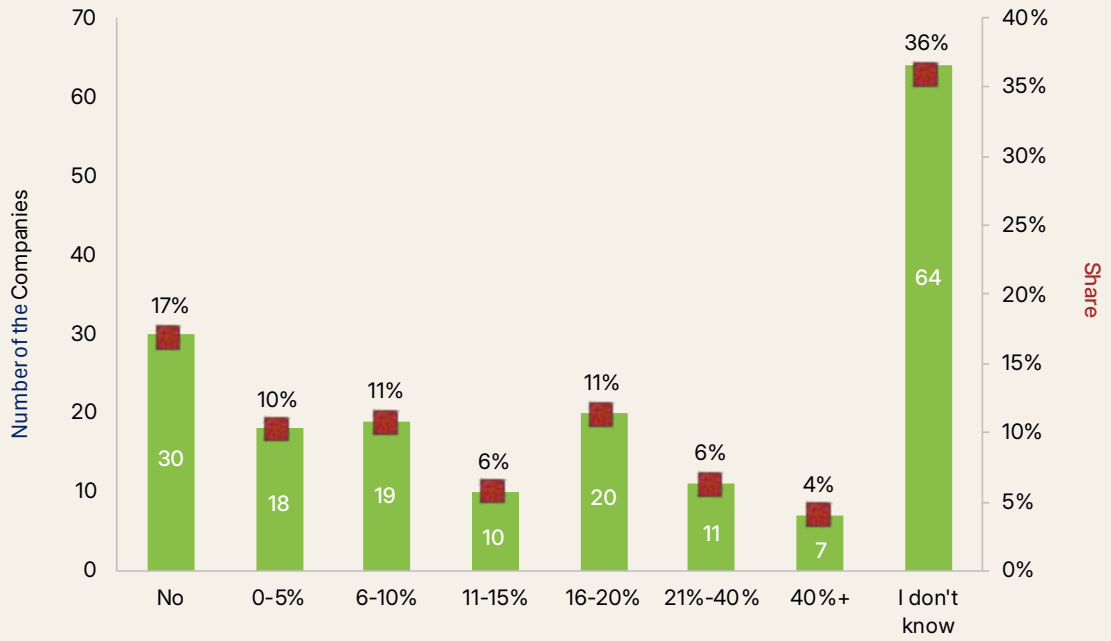
Graphic 19
Distribution of Measures Taken (2022–2026)



Although not strictly an energy efficiency measure, the installation of renewable energy capacity has been included in this list because it is a very suitable measure for making businesses' energy use more sustainable. This is an area in which businesses are increasingly investing.

Companies were also asked about the "savings rates achieved as a result of the measures implemented". Of the companies participating in the survey, 64 (36%) stated that they did not know how much they had saved, while 30 (17%) indicated that they had not saved anything. These rates are shown in Graphic 20.

Graphic 20
Savings Achieved as a Result of the Measures Implemented (2026)



The lack of awareness regarding savings rates also indicates that companies still do not attach the expected importance to energy costs.

One of the important questions asked during the survey was "Does your company have any energy efficiency programmes/policies?" Of the 238 companies that responded, 151 (63%) stated that they did not have such programmes/policies. This indicates that it is not possible to draw up a roadmap for areas where action needs to be taken. Therefore, encouraging 'policy development and data collection' must be the primary objective before any strategic planning can occur.

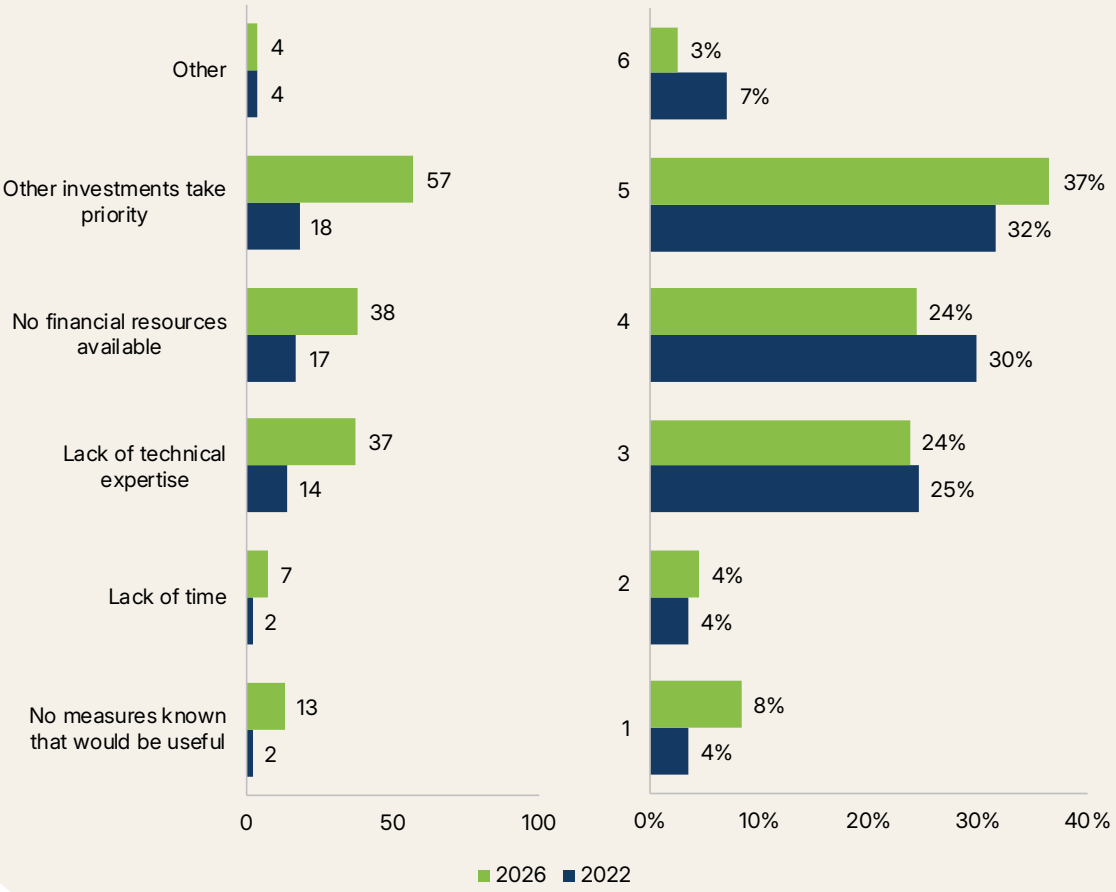
Another related question was, "Does your company have an ESG strategy?" Here, 177 of the 236 companies that responded (75%) stated that they did not have environmental, social, or corporate strategies.

Reasons Hindering Implementation

The proportion of companies planning to take action in the next four years is 57% of 226 companies.

The reasons given by the 43% of companies that stated they would not take action in the next four years were also among the questions asked. As shown in Graphic 21, the most frequently cited reasons in both reports, where multiple answers were possible, were other investments taking priority, lack of financial resources, and lack of technical expertise.

Graphic 21
Barriers to Taking Action (2022–2026)



For those considering acting in the next four years, the priority of other investments is cited as an obstacle to taking action, while for those not considering taking action, insufficient financial resources is also a prominent reason.

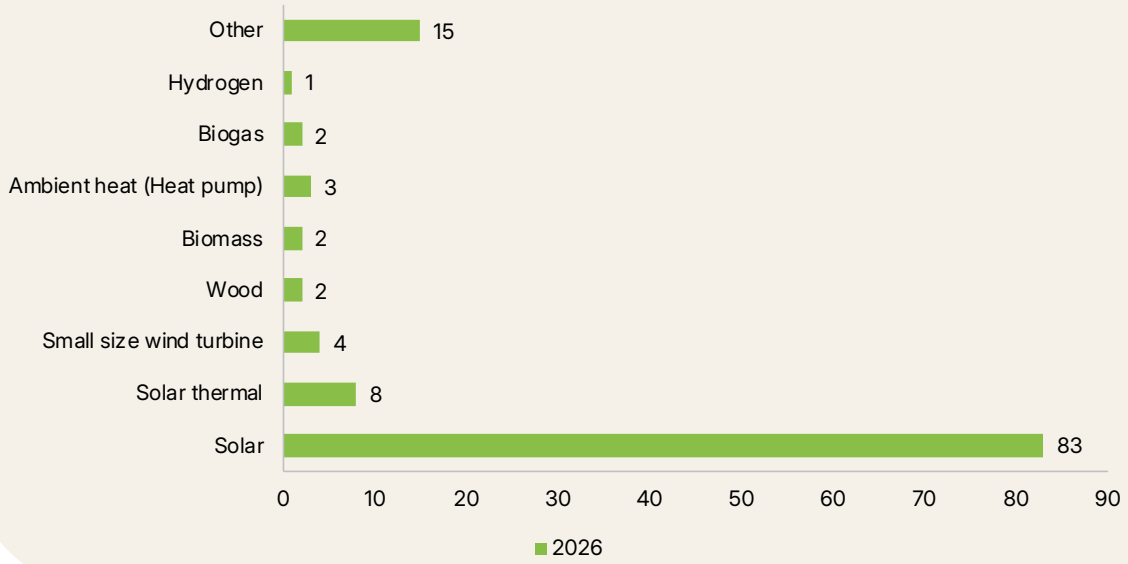
When the responses are linked to the energy programme/policy and ESG strategy responses, it should be considered that the lack of studies that would chart a course beyond these reasons may be a contributing factor.

F. Renewable Energy Plans

Current Renewable Energy Usage

The companies participating in the survey were asked which renewable energy systems they had installed. As can be seen in the responses of 120 companies, 69% of companies responded that they had solar power plants.

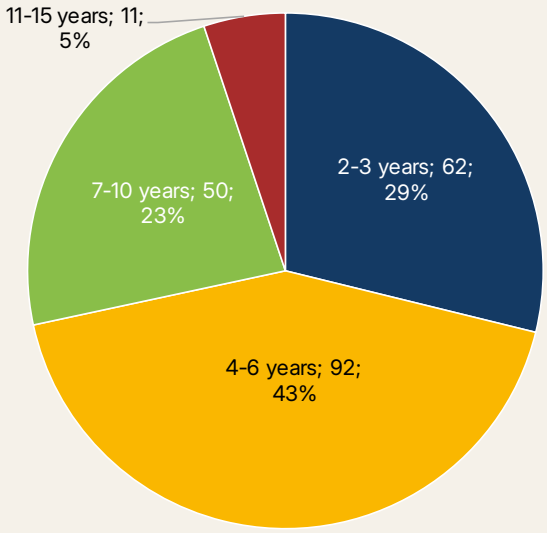
Graphic 22
Renewable Energy Usage (2026)



The responses provided by companies indicate that solar power plants began to be established from 2014 onwards, with such investments gaining momentum particularly after 2020.

Another issue is companies' tolerance regarding the payback period for renewable energy investments, particularly solar power plants. As can be seen in Graphic 23, 43% of companies consider a payback period of 4-6 years to be appropriate.

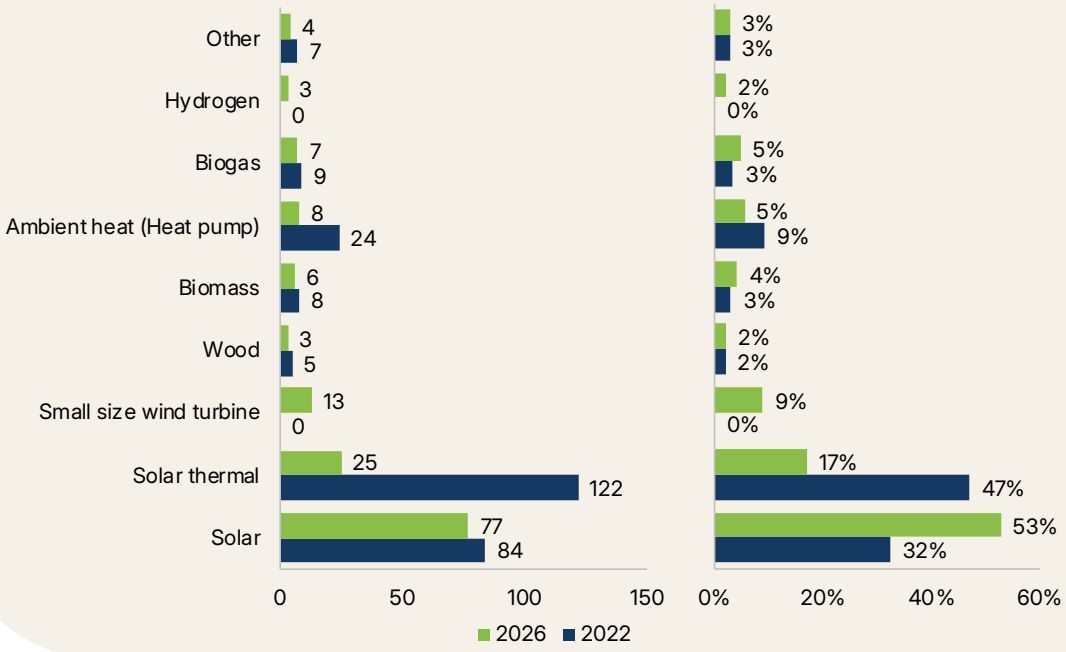
Graphic 23
Companies' Tolerance for Payback Periods in Renewable Energy Investments (2026)



Plans for Future Renewable Energy Use and Expected Benefits

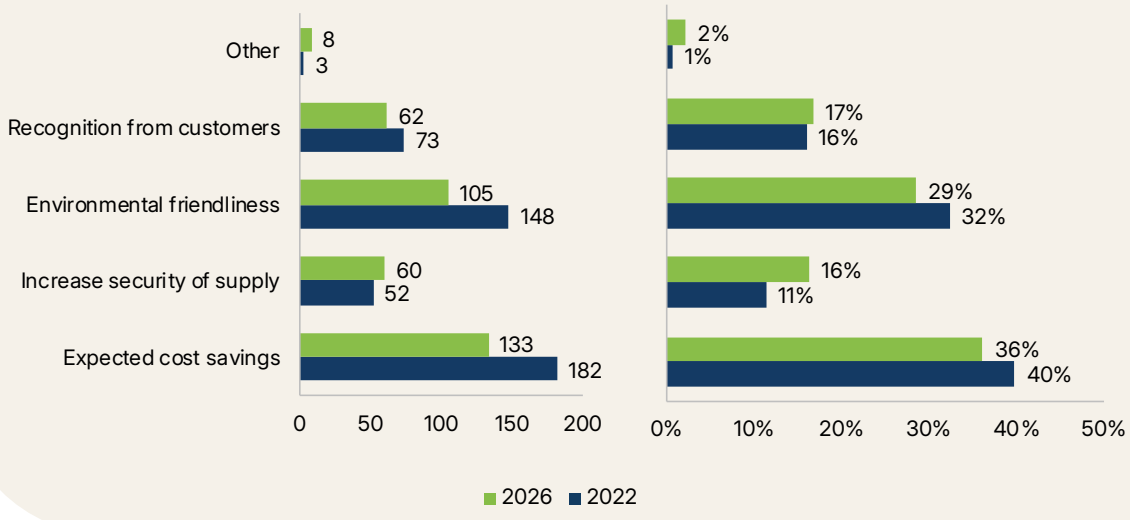
Solar energy ranks first among the types of renewable energy that companies prefer to use in the future. Furthermore, the increasing interest in solar energy over the years can be clearly seen in Graphic 24.

Graphic 24
Types of Renewable Energy that Companies Will Prefer to Use (2022–2026)



This trend is valuable both in terms of reducing the share of energy costs in total costs and from an environmental perspective. This observation is confirmed by both surveys (2022, 2026), as shown in Graphic 25, where companies ranked cost savings as their first priority and environmental friendliness as their second priority among the benefits they expect to gain from solar energy investments.

Graphic 25
Benefits Companies Expect from New Solar Energy Investments (2022–2026)

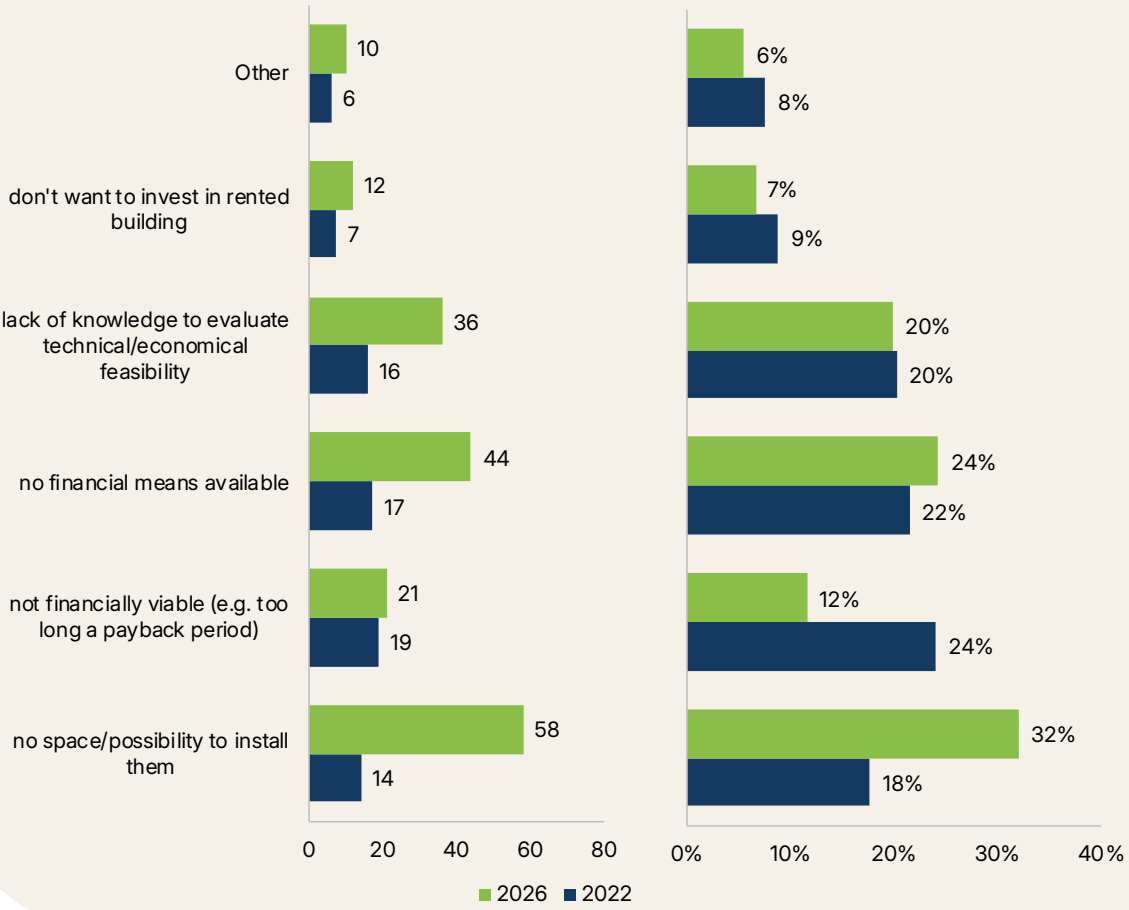


Reasons Hindering Installation of Additional Renewables

The most frequently cited reasons why businesses are unlikely to use other renewable energy sources in the near future again revolve around financial issues (insufficient resources and financial unfeasibility).

Another important issue that can be observed in Graphic 26 is the lack of suitable space in existing facilities for renewable energy installation. A large proportion of companies without space/facilities for installation are those operating in factories but without buildings larger than 20,000 m².

Graphic 26
Barriers to Companies Using Additional Renewable Energy (2022–2026)

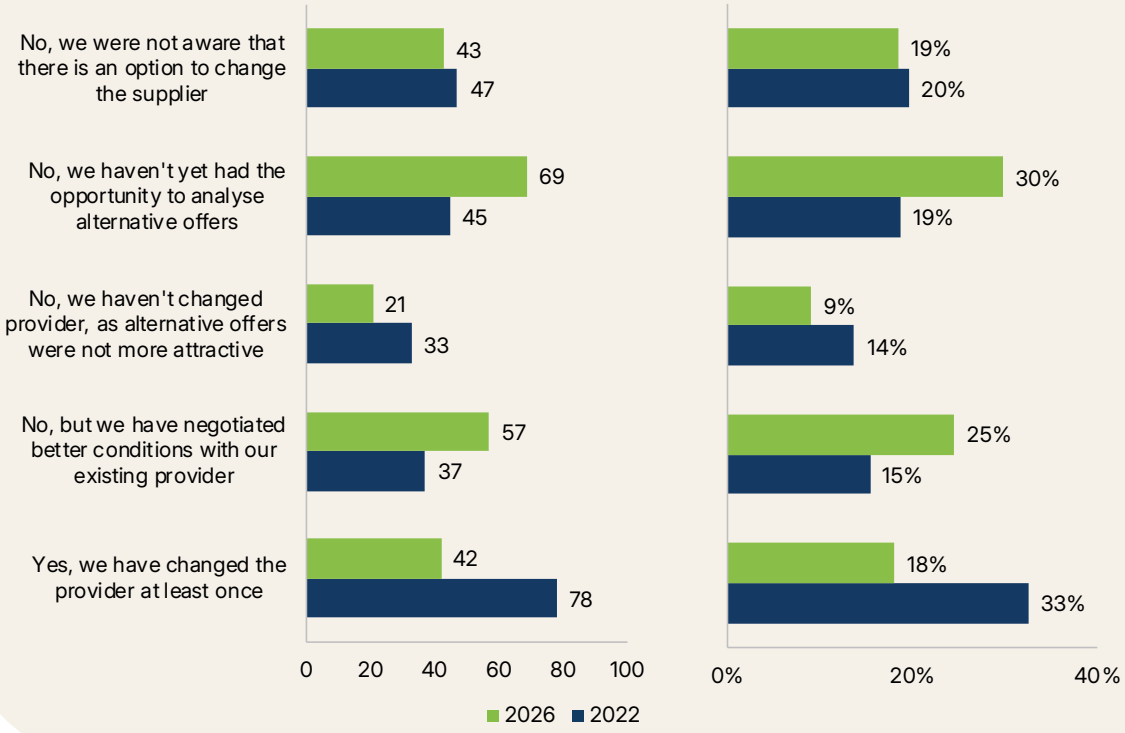


G. Supplier Switching

Of the companies participating in the survey, 234 answered "yes" to the question "Do you obtain your energy consumption/load data from your distribution operator or energy supplier?" at a rate of 72%. 185 companies answered the question of how often they receive information, and 81% stated that they receive information regularly "every month".

Of the companies participating in the survey, 232 responded to the question, "Have you changed your electricity supplier?" As shown in the 2022 report, a similar number of companies responded to the question, with varying percentages, as shown in Graphic 27.

Graphic 27
Have you Changed your Electricity Supplier? (2022–2026)



While 33% of companies stated that they had changed their energy supplier at least once in 2022, the rate was 18% in 2026. Companies stated that they had not yet analysed alternative offers in 2026.

In both surveys, the percentage of those unaware of the option to change suppliers was around 19%, and these companies were SMEs, while 32 out of 150 companies that receive regular monthly information stated that they were unaware of such an option.

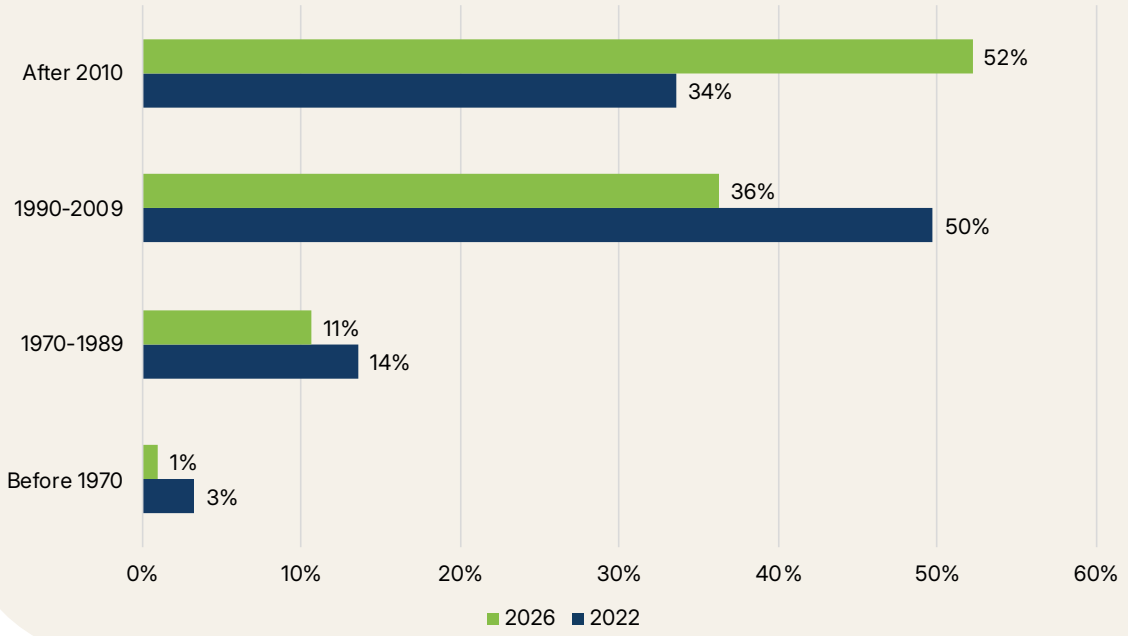
On the other hand, 161 companies answered the question of “Is smart metering applied in your company?” as “No” while 69 companies answered as “Yes”.

H. Buildings

Buildings Stock and Renovations

The building stock of the companies participating in the survey, grouped according to the year of construction as shown in Graphic 28, is spread across a wide range of relatively new buildings.

Graphic 28
Building Age (2022–2026)



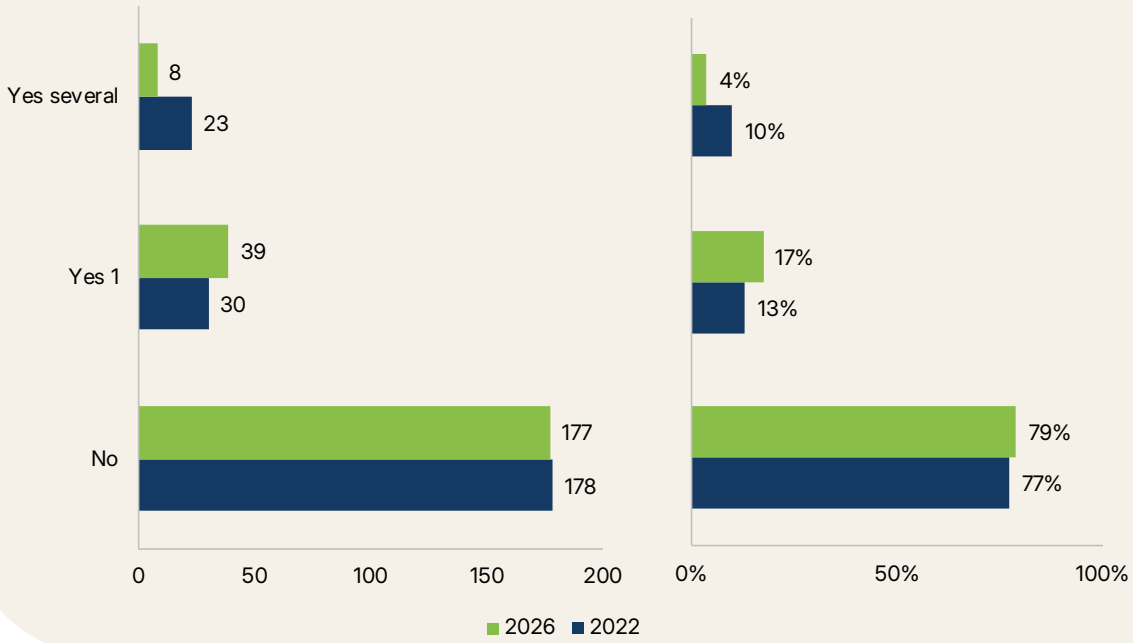
Of the 207 companies that responded to the question, 44 (21%) operate in buildings constructed mainly after 2020. Most companies also stated that the refurbishment took place after 2020.

Furthermore, of the 170 companies that responded to the question about whether they had renovation plans, 53 stated that they had plans to renovate their facilities in the coming period. The buildings of companies with renovation plans are over 15 years old.

Workspace Area and Building Energy Certificates

As we have provided information about the facilities where companies operate in the "Facility type and number" section, we will not repeat it here, but we can reiterate that 49% of the companies participating in the survey operate in factories. As shown in Graphic 29, in both surveys, 77-79% of companies do not have buildings larger than 20,000 m².

Graphic 29
Number of Facilities Larger than 20,000 m² (2022–2026)



The 20,000 m² threshold is important because it introduces different legal requirements for energy management for larger buildings. According to the provisions of the Energy Performance Regulation[4];

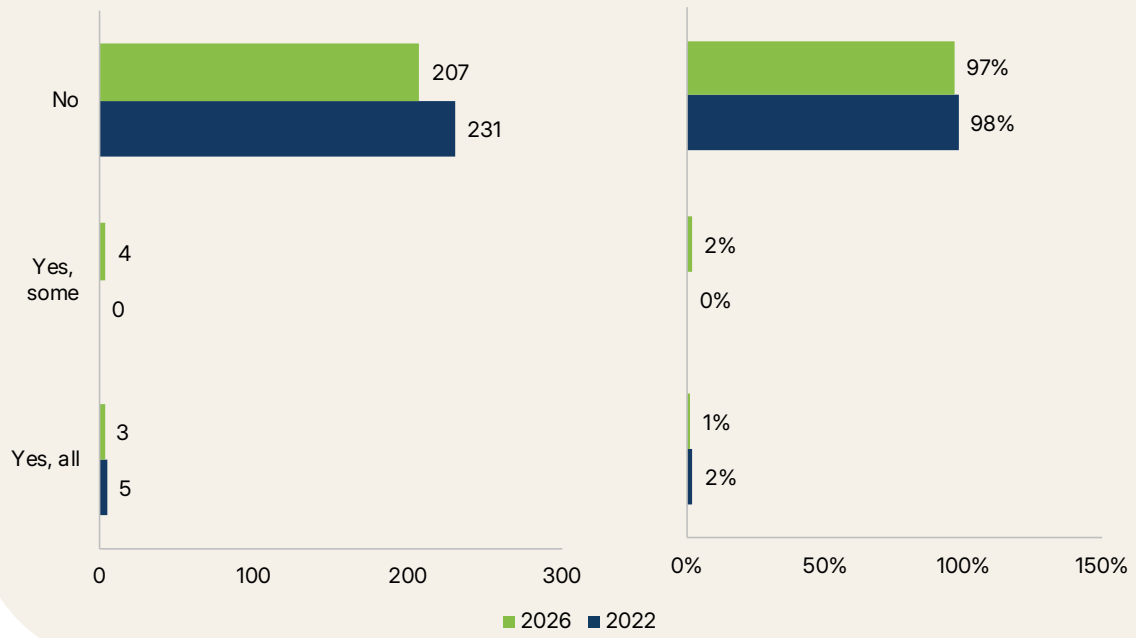
- *"In buildings with a construction area of up to 20,000 m², the cost of renewable energy systems MUST be recovered within 10 years, and in buildings larger than 20,000 m², within 15 years." (Article 22/2)*
- *"In air, ground, and water source heat pump systems, installation is MANDATORY if the initial investment cost is recovered within 15 years for buildings over 20,000 m², taking energy economics into account." (Article 22/3)*
- *"Cogeneration Systems (simultaneous production of heat and electricity and/or mechanical energy in separate facilities): Application possibilities are analysed for buildings with a total construction area exceeding 20,000 m². Applications are made if they do not exceed 10% of the construction cost." (Article 23)*

4 https://istanbul.csb.gov.tr/enerji-performansi-yonetmeligi-i-1350

One of the findings from the survey is that energy certificates issued for buildings are not widely used in the participants' building stock.

As can be seen in Graphic 30, nearly 98% of companies do not use energy certificates such as BREEAM, LEED, etc. in their buildings.

Graphic 30
Use of Energy Certificates in Buildings (2022–2026)



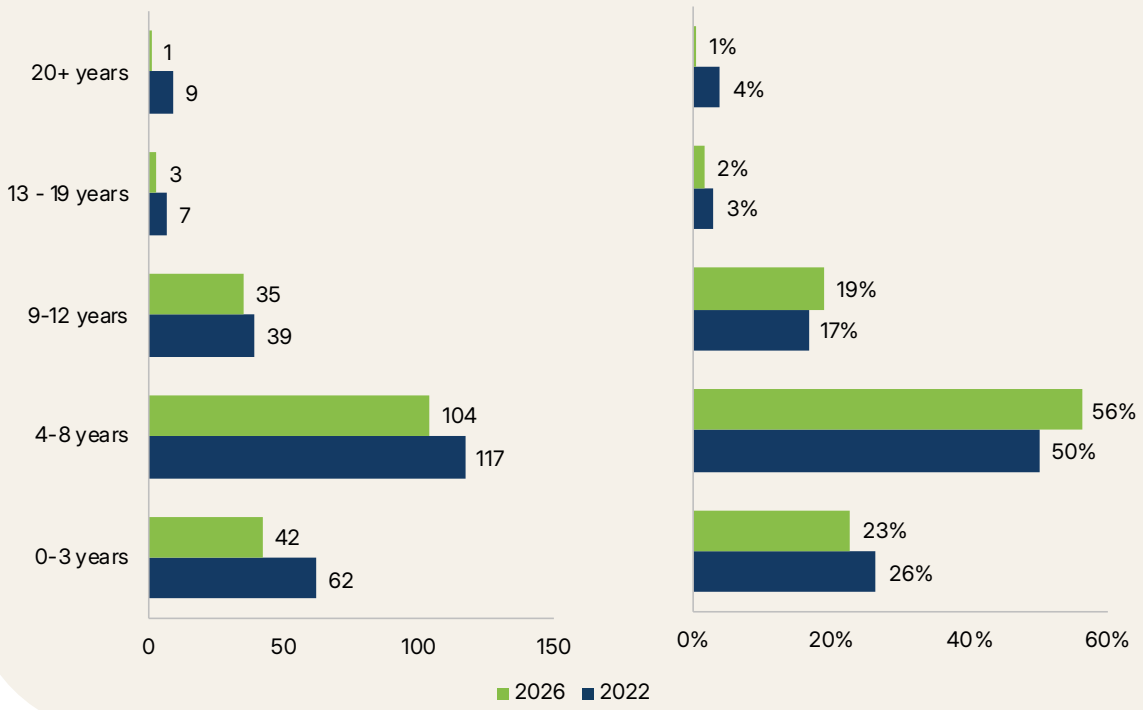
I. Economic Parameters

Naturally, the financial sustainability of an investment and the repayment period being considered reasonable by the investor are crucial for the investment decision to be favourable. Analysis of the responses provided by the companies participating in the survey reveals that expectations regarding costs and repayment periods are among the main obstacles to making investment decisions and implementing projects.

Maximum Acceptable Payback Time for Investments

The maximum payback period for investments, as reported by the companies participating in the survey, generally ranges from 0 to 25 years, and the results do not show significant differences when broken down by company size.

Graphic 31
Acceptable Payback Periods for Investments (2022–2026)



As can be seen in Graphic 31, more than 20% of companies consider repayment periods of up to 3 years to be reasonable, while more than 56% consider repayment periods of up to 8 years to be reasonable. 98% of the companies prefer a maximum repayment period of less than 12 years for renewable energy investments.

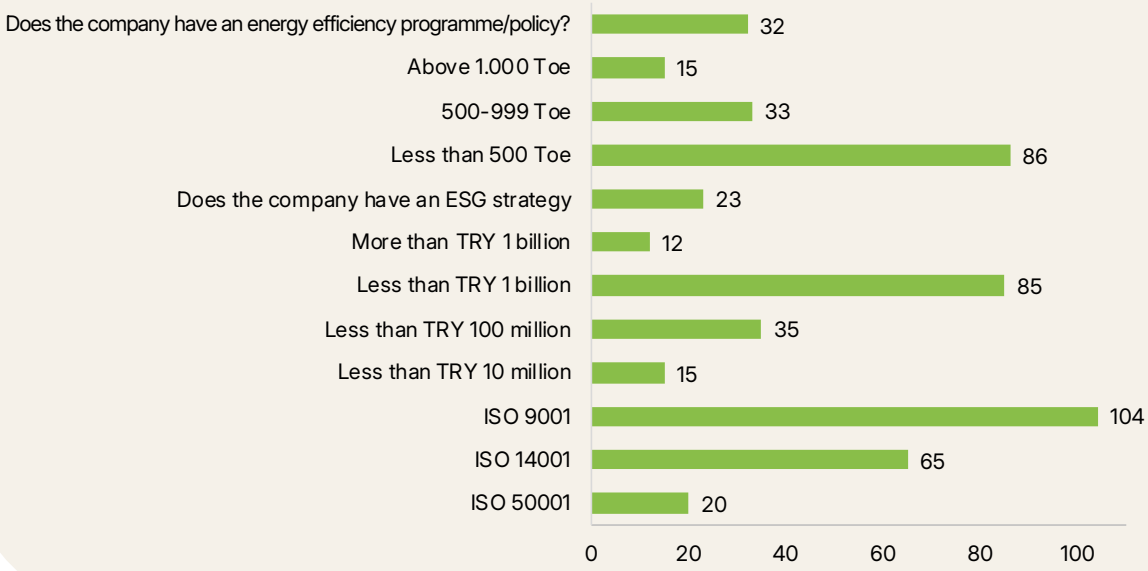
Profile of Exporting Companies

Exports are an important issue both for the country's economy and for companies' sales. Of the companies participating in the survey, 243 answered the question of whether they export. 62% of these companies indicated that they do export.

It is essential for exporting companies to closely follow trends in energy efficiency and renewable energy to operate in international markets and maintain their competitive strength, thereby ensuring the continuity of their sales and increasing their market shares.

In response to this situation, the profile of the 151 firms that stated they export and participated in the survey is summarized in Graphic 32.

Graphic 32
Profile of Export Companies (2026)



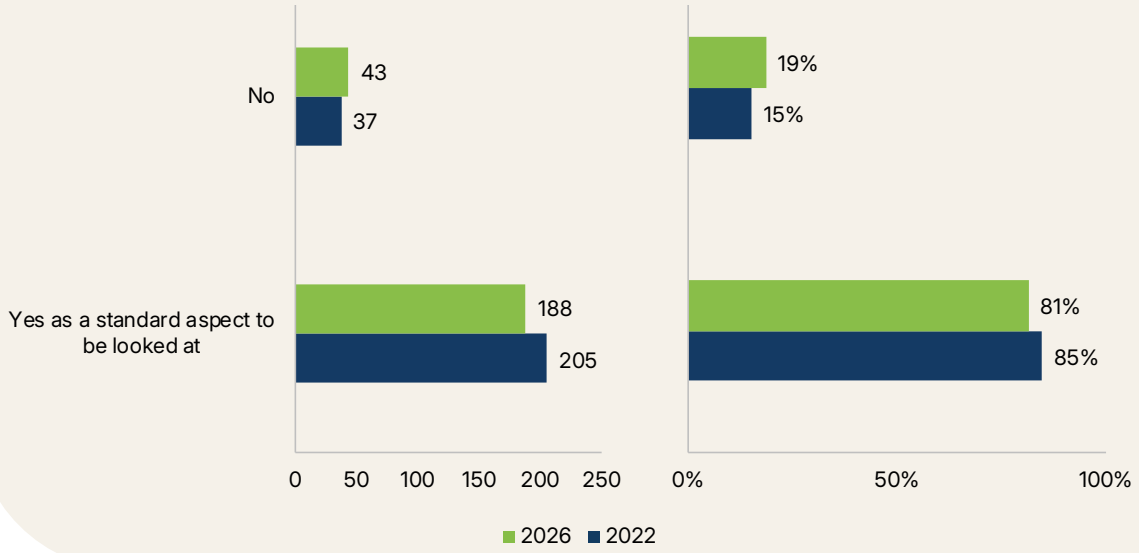
J. Efficiency in Procurement Decisions

Purchasing and design decisions regarding buildings or large equipment determine the initial investment cost as well as the energy consumption and operating costs that will arise throughout the asset's lifespan. The energy performance of a piece of equipment or a building is a characteristic that is difficult to change for many years after installation; therefore, the impact of choices made at the initial stage is permanent. Choices made without considering energy efficiency can lead to higher energy costs and lower operational efficiency in the future. For this reason, energy performance should be systematically evaluated as a criterion throughout all procurement processes, from the preparation of technical specifications to the selection of suppliers, and from the evaluation of design alternatives to the purchase decision. Such an approach contributes to both controlling long-term costs and supporting sustainability goals.

Criteria for Product Selection

In both studies, participants were asked whether they considered the energy efficiency of new equipment, machinery, buildings or vehicles when making purchasing/planning decisions. Over 80% of companies stated that they view this as a standard practice that should be considered.

Graphic 33
Consideration of the Energy Efficiency of New Equipment, Machinery, Buildings or Vehicles during Purchase (2022–2026)



Early Replacement of Inefficient Equipment

Of the 232 companies that responded to the survey question about whether inefficient equipment is replaced before the end of its useful life, 154 companies (66%) answered "yes".

The primary reason companies that made the replacement cited was "attempting to estimate the total cost of ownership, including energy-related costs (purchase + operating costs including energy consumption)". 51% of 216 companies selected this option. The second most common reason, at 29%, was commercial viability.

K. Support Instruments and Needs

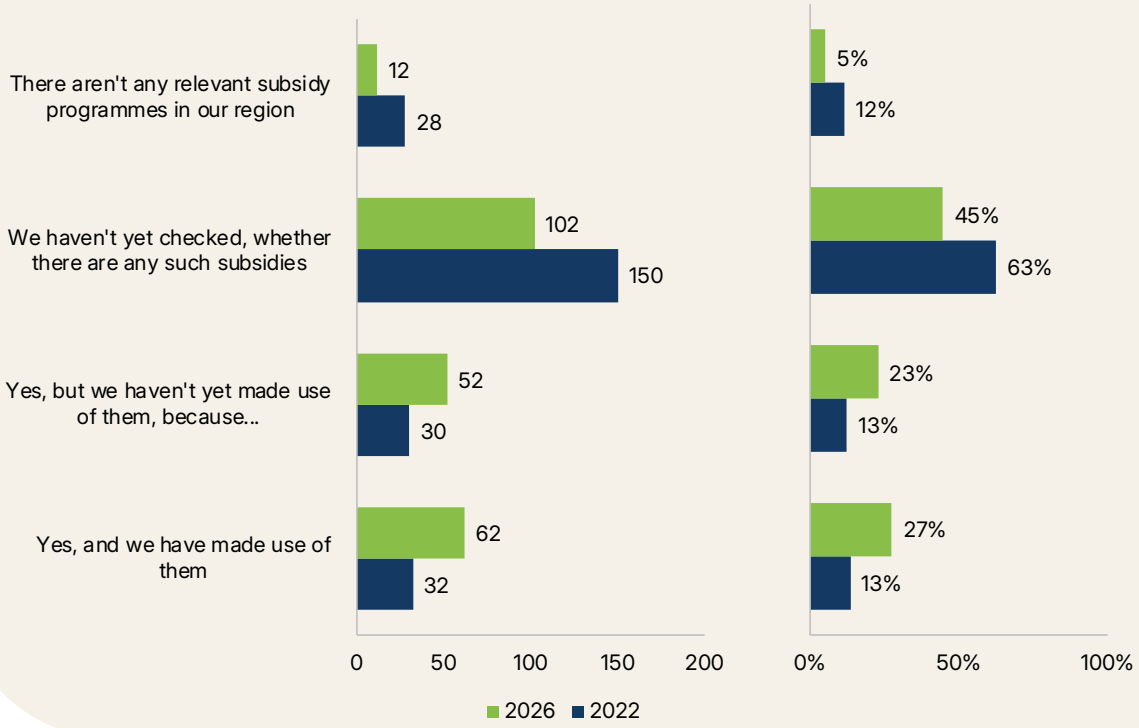
Awareness and Use of Subsidy Schemes

Various institutions in Türkiye offer support and incentives for renewable energy and energy efficiency. These support and incentives vary according to region, sector and type of investment. In addition, credit interest subsidies and interest-free loans are also provided to companies by national and international institutions. However, as with other incentives, companies' awareness and utilisation rates of these programmes have not reached the desired levels.

In the survey, the question "Are you aware of incentive programmes for energy investments?" was asked in both 2022 and 2026 to assess the situation of companies in this regard. In both studies, companies were unaware of the existence of such incentives.

Graphic 34 shows companies' interest in incentives. Only 27% of companies stated that they benefited from incentives.

Graphic 34
Are you Aware of Incentive Programmes for Energy Investments? (2022–2026)



In the comments, lack of information about incentives and the absence of relevant investments were frequently cited as reasons for not benefiting from incentives. Those who did benefit stated that they had benefited from KOSGEB and TÜBİTAK supports.

As expected, awareness of energy incentive programmes is much higher among businesses that have taken measures to improve energy efficiency over the last four years.

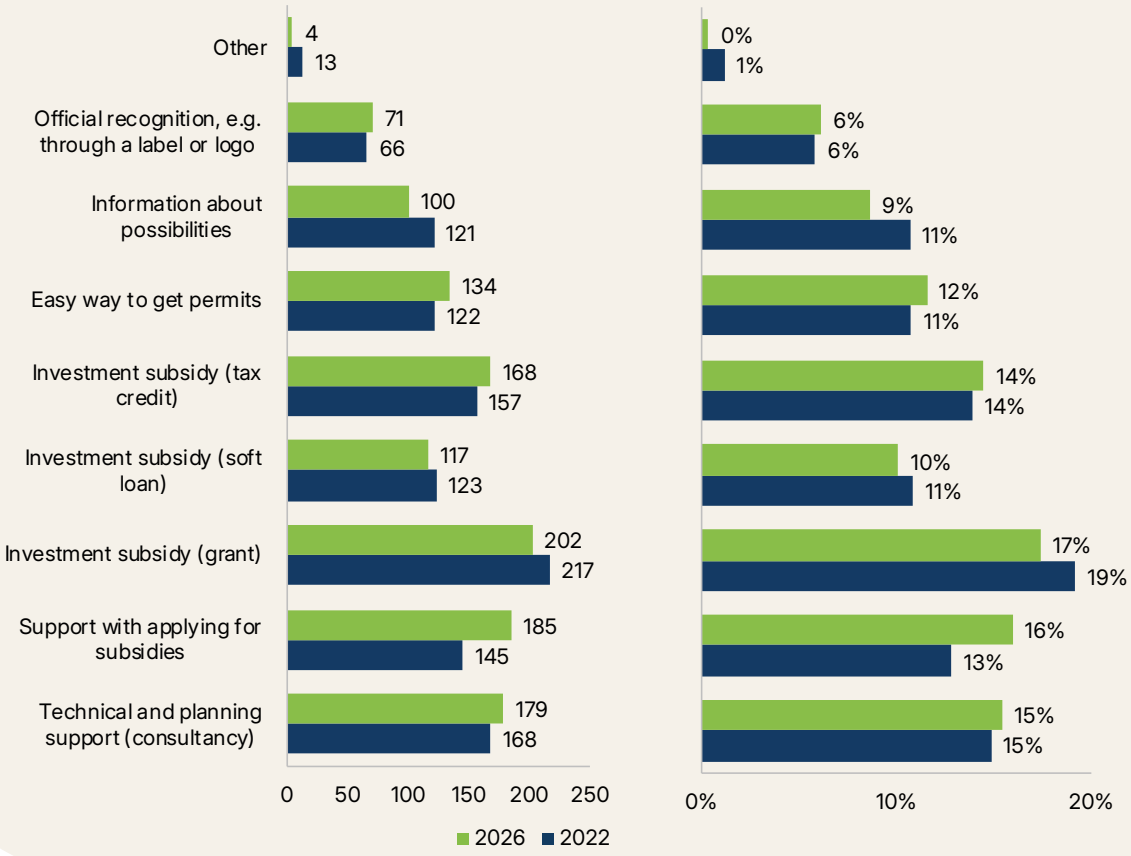
On the other hand, businesses that consume more energy have greater awareness and experience with incentives. However, a significant portion have not yet examined the incentives.

Similarly, awareness of incentives and the level of incentive utilisation are higher in companies that have an energy manager and are larger in size.

Support Instruments Perceived as Helpful

The survey also asked companies, "what support would enable companies to be more energy efficient or start using renewable energy". To answer this question, respondents could select multiple options as shown in Graphic 35. These answers point out solutions for overcoming the obstacles identified in other sections of the survey.

Graphic 35
Which Support Measures Would Enable your Company to Become more Energy Efficient/Use Renewable Energy? (2022–2026)



Most participants who mentioned additional support methods in the open-ended question stated that investment incentives (grants, favourable loans, and tax breaks) would be beneficial.

These priorities are relatively similar across businesses of various sizes. Companies with net sales exceeding 1 billion TL require less support and information regarding planning and incentive applications compared to other groups.

Section 7
Recommendations

Based on a comparative analysis of the data and conclusions from the 2022 and 2026 TEBD reports, the following recommendations are proposed. These recommendations directly address systemic challenges identified in the baseline TEBD I report and consider data gathered from the SMEs' cohort which participated in the TEBD II project, the data of which is presented and analysed in Section 7. Several targeted interventions proposed in the 2022 baseline report remain relevant, as the challenges they aimed to address are still persisting in 2026.

1. Restructuring Financial Eligibility Thresholds

The 2022 report identified that financial support mechanisms largely excluded businesses consuming less than 500 Tonnes of Oil Equivalent (TOE) annually, a group that comprised 43% of our survey cohort. In 2026, 69% of the surveyed businesses consumed below the 500 TOE threshold. Our findings confirm that the existing financial support framework has not changed, continuing to exclude the majority of respondents. This compromises the ability of most respondent SMEs to implement energy efficiency measures.

Government and regional authorities might find it attractive to restructure energy efficiency subsidies to capture such businesses, particularly SMEs, operating below 500 TOE of annual consumption. Maintaining the current threshold continues the exclusion of the business demographic in most need of financial support measures – resulting in a continued locking-out of the majority of respondents.

2. Shift Renewable Strategy to Mitigate Physical Space Constraints

The 2022 report highlighted high respondent intent (79%) to adopt renewables, primarily solar photovoltaics, hindered largely by financial viability. While intent remains just as high in the second edition of our survey (79%), the 2026 data identify a critical new (or previously unrecorded) operational barrier: a lack of suitable physical space in existing facilities for renewable energy installations. This constraint disproportionately affects companies operating in factories without buildings larger than 20,000 m^2, which account for 77-79% of the current cohort.

Policy guidance and chamber and commodity exchange outreach should consider pivoting from promoting on-site (behind- the-meter) solar installations to facilitating off-site procurement solutions. Specifically, aggregated Power Purchase Agreements (PPAs) should be promoted to allow smaller SMEs to bypass physical space constraints by pooling demand for off-site generation.

3. Conditional or Preferential Financing

The baseline TEBD I report recommended promoting standardized energy planning, the appointment of energy managers, and ISO 50001 certification. However, the percentage of businesses without a designated energy manager remains at 73%, and the adoption rate of ISO 50001 stays on 6%.

Outreach alone has yet to solidify in improved internal energy management. Future financial support measures could consider either conditional or preferential financing, as push/pull measures to promote improved internal energy management. In the former case, financial aid could be directly tied to the mandatory appointment of a trained internal energy manager, or the formal initiation of ISO 50001 certification protocols. In the latter case, preferential financing (through for e.g. a higher cofinancing rate, or longer repayment/grace periods for state loans) could be offered to those entities for which internal energy management measures have been implemented. For SMEs, preferential measures are likely to yield better results than conditional measures.

4. Repositioning Energy Audits

The 2022 report noted that 75% of businesses had not conducted an audit in four years, and suggested subsidizing audits as 33% of respondent businesses considered financial aid as attractive or prerequisite to carrying out energy audits. While 65% still lack recent audits, the 2026 data reveals that the availability of full or partial subsidies has lost its importance as a motivating factor for carrying out future audits.

Given that direct cost subsidization is no longer the primary driver for audit adoption, authorities could consider shifting focus towards standardizing audit frameworks, to ensure these frameworks yield actionable, commercially attractive ROI projections. Furthermore, audits could be repositioned as a preferential or mandatory prerequisite to unlock more advantageous financial support measures, rather than a subsidized compliance measure.

5. Formalization of Chamber "Help Desks" to Counter Awareness Deficits

The TEBD I report recommended utilizing chambers and commodity exchanges for capacity building and outreach, noting their strong engagement potential but highly variable technical expertise. Importantly, respondent awareness of financial support remains low. In 2022, 64% of respondent businesses had not checked for available subsidies. In 2026, the same percentage - 64% remain unaware or have not checked for available subsidies. Furthermore, a lack of technical expertise remains a primary barrier to implementation for 33% of businesses.

Formalising voluntary inter-chamber collaboration into ongoing initiatives could yield attractive results. This could be further supported through the establishment of formalized and funded "Energy Efficiency Help Desks" within participating chambers and commodity exchanges, to be operated on an ongoing basis. These units would be explicitly tasked with closing the information gap regarding subsidy availability and assisting SMEs with the administrative burden of funding applications. The role of Energy Efficiency Help Desks should not be limited solely to supporting SMEs in identifying and tapping into funding; they could also perform other energy-related functions, such as disseminating lists of certified energy auditors, providing updates on regulations or policies, and facilitating participation in periodic national or regional projects.

6. Inter-Chamber Knowledge Transfer and Service Agreements

The 2026 data confirms that technical expertise remains uneven across regional chambers and commodity exchanges. While most chambers and commodity exchanges possess relatively low levels of technical expertise, specific entities, notably the Bursa Chamber of Commerce and Industry (BCCI), have considerable in-house energy auditing capabilities or other in-house expertise of value to businesses. The 2022 recommendation to establish formal service agreements between chambers and commodity exchanges to extend BCCI's, or other chambers and commodity exchanges with specialized knowledge, across the network remains a valid and attractive measure. Furthermore, establishing inter-chamber working groups to define and distribute sector-specific best practices globally across the network, could also be attractive. Such inter-chamber and commodity exchange infrastructure could also support acquiring additional tools for Türkiye – such as the digital platforms mentioned in this report, developed as part of EU funded projects by EU based chamber and commodity exchange networks and partners.

7. Tariff Comparison and Market Literacy Coaching

The 2022 report identified a need for awareness-raising and coaching to help SMEs navigate the electricity market and compare differing tariffs. The 2026 data validate this need, showing a regression in market engagement; the rate of businesses changing energy suppliers dropped to 18%, with many noting they had not analysed alternative offers. Additionally, approximately 19% of respondents remain unaware that changing suppliers is an option. Outreach programs should incorporate specific modules raising business awareness on how to evaluate energy supply contracts to identify the most attractive options available depending on the participating businesses' regions of operation.

8. Carbon Footprint and Life Cycle Assessment (LCA) Tool Deployment

The 2022 report correctly anticipated that customers would increasingly demand carbon footprint data from their supply chains. The 2026 data reveal that 75% of responding businesses still operate without any Environmental, Social, and Governance (ESG) strategy. The recommendation to implement simple, standardized online tools deployed by the chambers and commodity exchanges to allow SMEs to calculate their carbon footprints remains valid to prepare businesses for these supply chain requirements. Such tools are already available, and the integration of Türkiye could be achieved through Chamber-led projects.

9. Impawatt Platform Adaptation

The online platform Impawatt is designed to be extended and adapted to other countries, e.g., by including a special content management system to translate static platform content and to upload translated and new content to the platform. Impawatt can be used as an e-learning platform for ambassadors and companies, especially with the TEBD Checklist tool and after energy audits. Thus, Turkish best practices of companies and technologies as well as the Turkish financing opportunities on national and regional levels could be integrated into a localized Impawatt platform to benefit Turkish SMEs.

10. European Energy Efficiency Hub for SMEs

The Energy Efficiency Hub for SMEs offers a great variety of information and resources for energy efficiency projects. Turkish chambers and commodity exchanges are encouraged to visit the portal, exchange with EU project coordinators, and use the portal as a source to develop potential Turkish projects and tools.

11. Turkish Energy Efficiency Hub

To share experiences and practical knowledge, exchange best practices, and distribute tools (like those developed within the TEBD II project), a Turkish Energy Efficiency Hub for members of the Turkish chambers and commodity exchanges should be established. Integrating the TEBD II questionnaire into the hub and combining it with an interactive display of results would enable continuous updating of the status of energy efficiency in Turkish SMEs. The hub can be a simple WordPress website with filter engines to search for materials and activities.

12. Building Energy Performance Certification Initiatives

The 2022 TEBD I report advised integrating building certification into long-term energy strategies. The 2026 data demonstrate significant no progress; 86% of respondents still lack any form of building certification, and nearly 98% of companies surveyed do not utilize advanced energy certificates such as BREEAM or LEED. The recommendation to promote building certification at periodic intervals, or on an ongoing basis, remains valid to prevent continued infrastructural lockout.

13. Integration of Transport Metrics into Energy Audits

The 2022 report noted that while legal requirements focus on process and building emissions, integrating transport energy into standard energy auditing practices would yield attractive returns. The 2026 data indicate an organic increase in audits related to transportation and vehicles among the respondent businesses. The recommendation to formally incorporate transport efficiency into outreach programs and regulatory auditing frameworks remains valid and aligns with current market trajectories.

Annexes

You can scan this QR code to access the annexes

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