inFUELencer
PROMOTING ALTERNATIVE PATHS FOR FUEL RETAILERS

The inFUELencer Digital Report

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Summary

The inFUELencer project is a strategic Erasmus+ Cooperation Partnership (KA220-VET) designed to support fuel retail businesses in navigating the transition toward a carbon-neutral economy. Our mission is to provide these businesses with the specialised knowledge, strategic tools and green skills needed to ensure long-term viability. Key project results include:

- inFUELencer Curriculum: A sector-specific training framework tailored to business viability and green transformation.
- E-Learning Platform: An accessible digital hub featuring self-assessment tools, a Needs Identification Tool, and multimedia resources to facilitate self-paced learning.
- Capacity Building: Practical workshops and 'train-the-trainers' sessions that bridge the gap between policy requirements and real-world business application.

The research conducted in this report is a part of our inFUELencer Curriculum development process. In this research, we gathered insights from our key stakeholders (127 fuel retailers and 50 vocational trainers and educators) with the aim to establish a robust, evidence-based foundation for developing a sector-responsive vocational education and training (VET) curriculum on alternative fuels, directly supporting the green transition in the fuel retail sector. Our research was conducted in five European countries (France, Germany, Greece, Italy and Poland) in early 2026.

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How to cite: Kliafa, C., Doan, M. H., Marsal EL Younsi, I., Scarpello, L.-R., Solivo, M., Rajnayan, S., Leist, S., Samaras, S., & Hap, Z. (2026). *The inFUELencer Digital Report*. The inFUELencer Project.

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1. Introduction and Methodology

1.1 Project Context

The European Green Deal is bringing significant and transformative changes to the fuel retail sector, driven by strict environmental regulations, rapid technological advancements, and a fundamental shift in consumer preferences. Policies such as the Alternative Fuels Infrastructure Regulation (AFIR) and the European Union's commitment to phasing out the sale of internal combustion engine (ICE) vehicles by 2035 are creating immense pressure on fuel retailers to adapt. These regulations mandate the development of infrastructure for alternative fuels, such as electric vehicle (EV) charging stations, hydrogen refuelling sites, and sustainable fuels like biofuels and e-fuels. As fossil fuel demand declines due to increasing taxes and stringent renewable energy targets, retailers must pivot toward green energy solutions. Non-compliance with these regulations could result in severe penalties, making the transition to sustainable energy not just an opportunity but a necessity for survival in this rapidly evolving market.

At the same time, technological innovations are reshaping the way energy is consumed, delivered, and managed. High-power EV charging stations, hydrogen fuelling systems, and the integration of vehicle-to-grid (V2G) technologies are emerging as critical components of the new energy ecosystem. These advancements provide fuel retailers with an opportunity to diversify their offerings, but they also require significant capital investment and collaboration with energy providers, technology companies, and fleet operators. Digital transformation is becoming equally important, as it enables efficient energy management, seamless payment systems, and enhanced customer experiences through advanced analytics and personalised services. Retailers must embrace these technologies to modernise operations and remain competitive in a sector where traditional business models are rapidly becoming obsolete.

Consumer behaviour is also undergoing a dramatic transformation. With nearly 30% of new car registrations in the EU expected to be battery electric vehicles (BEVs) or plug-in hybrids (PHEVs) by 2026, there is a growing demand for integrated mobility hubs that offer more than just fuel. Today's consumers expect fast and reliable EV charging, convenience stores with modern amenities, and digitalised services that make their lives easier. The decline in fossil fuel demand, coupled with the rise of sustainable mobility solutions, is forcing fuel retailers to rethink their strategies to meet these new expectations. Retailers that fail to adapt risk losing relevance as consumers increasingly prioritise sustainability and convenience in their choices.

In this rapidly changing landscape, fuel retailers must take bold and decisive actions to remain viable. Diversifying energy offerings, embracing digital-first operations, and positioning themselves as leaders in sustainable mobility are no longer optional – they are critical for long-term success. The European Green Deal has set an irreversible course for the sector, and retailers must align their operations with its objectives to thrive. By investing in renewable energy infrastructure, adopting cutting-edge technologies, and meeting evolving consumer needs, retailers can position themselves as key players in a decarbonised future. However, failure to act decisively will likely result in a loss of market share and profitability as the world transitions toward a cleaner, greener energy landscape. The challenge is immense, but so is the opportunity for those willing to lead in this new era of sustainable energy.

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1.2 Methodology

1.2.1 Target Groups

In this sense, the inFUELencer project is designed to support fuel retail businesses in navigating the transition toward a carbon-neutral economy. Our mission is to provide these businesses with the specialised knowledge, strategic tools and green skills needed to ensure long-term viability. Our first project result is the inFUELencer Curriculum, a sector-specific training framework tailored to business viability and green transformation. The curriculum is planned to be a sector-responsive vocational education and training (VET) curriculum on alternative fuels, directly supporting the green transition in the fuel retail sector. The primary target groups (TG) of the inFUELencer project and the curriculum research include:

- **Fuel retailers:** including owners, managers and strategic decision-makers operating fuel retail businesses;
- **VET trainers and educators:** entities involved in vocational education and training, with special focus on those entities which are related to sustainability, energy, circular economy, mobility, retail and business management.

For what concerns the first TG, fuel retailers are selected according to a set of transparent and inclusive criteria aimed at ensuring diversity, representativeness, and relevance: participants must be actively operating in the fuel retail sector within one of the partner countries. Particular focus is put on achieving diversity in terms of business size, geographical location (urban, suburban, rural), service offering (traditional fuel, electric vehicles charging, alternative fuels, retail services) and level of engagement with sustainability or innovation. The project deliberately seeks to include “independent” fuel retailers, together with early adopters of new technologies and retailers at an early stage of transformation, ensuring that the curriculum responds to different starting points and capacities.

The second TG will be selected based on the professional experience in vocational education and adult learning, with special attention to those areas relevant to the fuel retail sector. Trainers with experience in sustainability, energy transition, circular economy, digitalisation, or SME training may be prioritised. Most of all, the interest and commitment to contribute to interviews and surveys, validation activities, and feedback processes will represent a key selection criterion as an element of contribution potential.

In general terms, fuel retailers contribute primarily by sharing first-hand insights into operational challenges, transformation barriers, and emerging skills needs. At the same time, VET trainers provide a complementary and integrative perspective, contributing institutional and educational expertise and insights into curriculum design, delivery methods, and assessment strategies, providing a data-driven base for curriculum design. All the relevant information will be gathered, collected, and processed, through the surveys and interviews to the TGs, together with all the relevant activities in the implementation phase.

It is important to consider also that other relevant stakeholders such as VET providers not specialised in sustainability matters, together with sector associations, local representative entities and policy actors, will be involved during dissemination and validation phases, supporting broader uptake and sustainability of results.

In early 2026, we conducted a total of 127 surveys targeting fuel retailers (minimum 25 per country) and 50 interviews targeting vocational trainers and educators (10 per country). One of the main challenges during the data collection phase was related to the global economic situation during the project period. Due to the economic uncertainty connected to the Iran conflict and its impact on international markets, many organisations informed us that they currently lacked the time and resources to participate in interviews or discussions. Another challenge was also the lack of a clearly established vocational education and training (VET) structure for the fuel retail sector. In addition, many of the relevant companies operating in the sector are international players with structures and decision-making processes located outside Europe. Additionally, Erasmus+ as a programme was unfamiliar to some stakeholders, which sometimes reduced their interest in participating.

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1.2.2 Research Methodology and Structure

In this foundation research as a basis for curriculum development, we conducted a needs analysis used a mixed methods approach combining quantitative and qualitative data collection. To target fuel retailers, a 30-question online survey was distributed in five languages of the five European countries under studied. To target VET trainers, 15-question structured interviews were conducted in six languages (including English, as per the needs of the interviewees).

The fuel retailer survey explored how fuel retailers perceive the green transition, regulatory pressures, business transformation and future training needs. It is designed as an online structured questionnaire, composed of different questions to explore the current sector status; the knowledge and skills needs and challenges encountered by fuel retailers; and sectoral prospects and recommendations. The survey considers 30 questions and takes approximately 10–15 minutes to complete. In more details, the questionnaire collected information on:

- Awareness of sustainability and Green Deal policies
- Expected regulatory and market impacts
- Transition readiness and capability gaps
- Technology adoption barriers
- Training participation and learning preferences
- Future business trends and support needs

The interview to VET trainers was composed of different questions to explore the current sector status; the knowledge and skills needs and challenges encountered by fuel retailers; and sectoral prospects and recommendations: the survey considered a fully open discussion through a structured scheme to compare data end ensure cross-country analysis. This approach ensures triangulation of findings and strengthens the reliability of conclusions. More specifically, structured interviews for VET trainers aim to identify training gaps in existing VET provision, explore required future competencies for fuel retailers, capture pedagogical recommendations and identify barriers to curriculum integration of sustainability topics.

1.2.3 GDPR Compliance and data consideration

All research activities comply with Regulation (EU) 2016/679 (GDPR). Partners provided participant information and obtained explicit consent prior to participation. All the responses and feedback collected are anonymised and securely stored. Data will be used strictly to the project purposes. Partners made it clear that participation is voluntary and withdrawal is possible at any stage.

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2. Current Sector Status

2.1 Transnational Overview

The current operational landscape of the fuel retail sector across the partner countries is marked by a shared transition pressure, but highly uneven starting points. Across France, Germany, Greece, Italy and Poland, fuel stations remain structurally anchored in conventional fuel sales. At the same time, the findings show that the sector is already moving, at different speeds, towards broader service, mobility and energy models. The first five survey questions provide a baseline picture of business size, experience, location, current services and perceived viability. Taken together with the VET trainer and expert inputs, they show that the green transition is not experienced as a single, uniform process. It is shaped by the size of the business, the territory in which it operates, the availability of investment capital, the maturity of local infrastructure and the ability of operators to interpret change as an opportunity rather than only as a threat.

The most visible transnational difference concerns business structure. France and Greece are dominated by very small fuel retail operators. In France, the surveyed sample is strongly rural and mostly composed of single-station businesses, while in Greece the sector profile is even more atomised, with the vast majority of respondents operating a single station. Poland also reflects a small-business and franchise-oriented market, where single-station and small multi-station operators are central and large networks are absent from the sample. This contrasts sharply with Germany, where most respondents represent larger operators managing more than ten stations. Italy occupies a middle position, with a more mixed sample that includes single-station businesses, small networks and larger operators.

This structural contrast is important because it affects how the green transition is understood and managed. Larger operators, such as those strongly represented in the German sample, are more likely to have the capital, internal management capacity and strategic planning structures needed to test new technologies, develop mobility hub concepts and absorb regulatory complexity. Smaller and independent operators, more visible in France, Greece and Poland, often face the same transition pressures with fewer resources and less room for risk. For them, transformation is not only a question of innovation. It is also a question of survival, continuity and whether future investments can realistically be financed.

Across the countries, respondents generally have substantial experience in fuel retail. France and Germany both show highly experienced samples, while Greece, Italy and Poland also include many operators with several years of sector experience. This is a crucial finding because it shows that the main challenge is not a lack of basic professional knowledge. The operators surveyed know the traditional fuel retail model well. The problem is that the sector is being asked to adapt to a new operating environment for which past experience is necessary but not sufficient. Long-standing experience may support resilience, customer loyalty and operational stability, but it can also reinforce attachment to existing routines and make transformation feel risky or unclear.

Location adds a second layer of difference. The French sample is entirely rural, and the Greek sample includes a strong rural presence alongside urban and suburban operators. Germany shows a mixed geographical profile, while Italy and Poland are more strongly shaped by urban, suburban and peri-urban contexts. These differences matter because the green transition does not look the same in a rural area as it does in a metropolitan or high-traffic environment. Rural stations often operate as local service points and mobility nodes, serving communities where alternatives may be limited and customer volumes may not justify high-risk investment. Urban and suburban stations, on the other hand, tend to face stronger competition, higher operating costs and more immediate expectations for digital and alternative energy services.

The service profile of the surveyed stations suggests that diversification is already underway across the consortium. Fuel sales remain universal or central in all national contexts, but many operators already provide complementary services such as car wash, convenience retail, food and coffee, local services or other non-fuel offers. This indicates that fuel retailers are not static. Many have already

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begun to reposition their sites as multi-service locations. However, the data also shows a clear difference between general service diversification and genuine energy diversification. Non-fuel services are relatively widespread, but EV charging and alternative energy infrastructure remain much more uneven.

Germany appears the most advanced in this respect, with EV charging already integrated into the service offer of many surveyed operators and with expert interviews describing a move towards multi-energy station models. France and Poland show emerging adoption, while Greece and Italy remain at an earlier stage, with EV charging present only in a small minority of surveyed stations. This pattern suggests that fuel retailers may be adapting their customer offer faster than their energy infrastructure. In practical terms, many stations are already diversifying as retail and service environments, but the shift towards becoming multi-energy hubs is still constrained by investment costs, uncertain demand, local infrastructure readiness and confidence in future returns.

The qualitative findings help explain why this unevenness exists. In Germany, expert inputs describe fuel stations as moving beyond a narrow fuel retail logic and towards broader mobility service provision. The future station is imagined as a site combining conventional fuels, charging infrastructure, HVO, e-fuels, biofuel blends, convenience retail, food and drink, car wash and customer support. This interpretation shows a relatively advanced awareness of the station as a diversified mobility and service hub. However, the same qualitative material also warns that this transformation increases operational complexity for staff and depends heavily on-site quality, investment capacity and management readiness.

In France, VET trainer responses describe a sector in transition, but with unequal preparedness. Larger groups are perceived as better equipped to anticipate change, while independent operators are considered more financially fragile and less able to translate awareness into action. This is consistent with the rural and single-station profile of the French sample. The green transition is therefore not only a technical matter in the French context. It is closely linked to the survival of local service points, the availability of investment support and the ability of small businesses to diversify without being overburdened.

The Italian qualitative material illustrates this tension very clearly. One retailer explains that in rural areas, small family-run businesses face higher fuel and transport costs, while customer loyalty and complementary services such as maintenance and tyres help keep them afloat. This insight shows that rural viability depends on more than fuel sales. It depends on local embeddedness, trust and a broader service relationship with customers. At the same time, the Italian data shows that retailers recognise the direction of change, but many do not yet see a low-risk pathway for adapting their business model. Italy therefore reflects a sector caught between a still-important conventional fuel market and the pressure to invest in future mobility services.

In Greece and Poland, the findings point to greater existential uncertainty. Greek operators show some service diversification, but EV charging remains limited and confidence in long-term viability is weaker than in Germany. VET trainer insights in Greece describe a sector where transformation is underway but uneven, where the transition is both green and digital, and where readiness remains moderate at best. Polish operators also show diversification through car wash and food or coffee services, and EV charging is more visible than in Greece or Italy. Nevertheless, business confidence remains cautious, reflecting pressure on margins, regulatory uncertainty and the difficulty faced by smaller operators in planning long-term transformation.

Baseline awareness of the green transition should therefore be understood as present but uneven. The early retailer questions do not measure policy knowledge directly, but they show indirect signs of awareness through service diversification, EV charging uptake and viability concerns. The VET and expert inputs make this clearer: operators and trainers recognise that the sector is changing, but awareness does not always translate into preparedness. Germany shows stronger evidence of strategic awareness around mobility hubs and multi-energy models. France and Greece show awareness filtered through concerns about small-business survival and investment capacity. Italy shows awareness of change alongside uncertainty about timing, demand and financial risk. Poland

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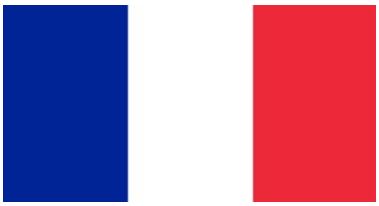
shows awareness of transition pressures but also concern that many operators lack the capital and strategic tools to respond.

Self-assessed viability confirms this picture of cautious and uneven resilience. German respondents are comparatively optimistic, with most rating their business prospects as moderate to high. France also shows cautious stability, although confidence is moderated by rurality and investment constraints. Italy shows moderate confidence, but the number of respondents who preferred not to answer suggests that uncertainty may be underestimated. Greece and Poland express more visible anxiety, with fewer operators reporting strong confidence and more respondents seeing only moderate or low prospects. These differences should not be interpreted as simple optimism or pessimism. They reflect different market structures, different levels of diversification, different exposure to transition infrastructure and different capacities to absorb change.

Overall, the transnational picture is one of a sector that is not refusing transition but is not equally ready for it. Fuel retailers are experienced, locally embedded and already diversifying their services. However, the move towards sustainable, digital and multi-energy business models remains uneven and dependent on structural conditions. The main divide is not only between countries, but between operators with the resources to plan transformation and those that can only respond to immediate operational pressures. This has direct implications for the inFUELencer project. Training and support must start from the real operating conditions of the sector: the micro-enterprise structure of many markets, the role of rural stations as local service nodes, the growing importance of non-fuel services, the uneven uptake of EV infrastructure and the gap between awareness and practical readiness.

2.2 National Contexts

2.2.1 France



This section captures the structural and operational profile of the 25 fuel retailers surveyed in France and draws on insights from 13 VET trainer responses. The French sample is highly rural and dominated by single-station operators, which is essential for interpreting the results: transformation is not being assessed from the perspective of large, capital-rich networks, but largely from that of local service points operating close to their communities and often with limited investment capacity.

Business Scale: Number of Fuel Stations Operated

Comment: The French fuel retail market is largely composed of small independent operators.

Response	Count	Visualisation
Single Station	**21 (84%)**	
More than 10 stations	**3 (12%)**	
2 - 5 stations	**1 (4%)**	

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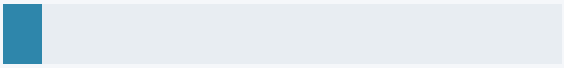
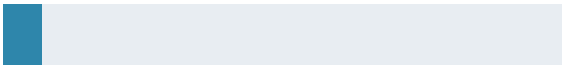
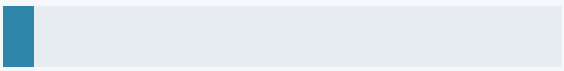
Key Insight: 84.0% of French respondents operate a single station and 100.0% are located in rural areas. The French dataset therefore reflects a strongly rural micro-enterprise profile, where the fuel station is often more than a refuelling point: it is a local mobility and proximity-service node. This makes business viability highly dependent on diversification, accessibility, and the capacity to finance transition investments at small scale.

Years of Experience in Fuel Retail

Comment: Most respondents have extensive experience in fuel retail operations.

Response	Count	Visualisation
More than 10 years	**20 (80%)**	
5 -10 years	**2 (8%)**	
3- 5 years	**2 (8%)**	
Less than 3 years	**1 (4%)**	

Key Insight: 80% of respondents have over 10 years of sector experience. This is a highly experienced cohort, indicating that skills gaps identified are not due to inexperience but rather structural and technological transformation challenges.

Primary Business Location

Comment: The sample is entirely rural, reinforcing the importance of local mobility services.

Response	Count	Visualisation
Rural	**25 (100%)**	

Services Currently Offered

Comment: Diversification is already visible through EV charging and convenience services.

Service Combination	Count	Share
Fuel	**25**	**100 %**
Car wash	**10**	**40%**
Convenience / other local services	**9**	**36%**
EV charging	**8**	**32%**

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Food / coffee	**3**	**12%**

Key Insight: All stations provide fuel (100%), with **40% offering car wash** and **36% local services**, showing moderate diversification. However, **EV charging (32%)** and **food/coffee (12%)** remain underdeveloped, highlighting growth potential in customer experience and energy transition services.

The current operational landscape already shows signs of diversification. All respondents offer fuel, but 40.0% also provide car wash services, 36.0% report convenience or other local services, and 32.0% already mention EV charging. This is a noticeably important signal in the French rural sample: electrification is not only an urban issue, and rural stations are already being pushed to consider charging infrastructure as part of their future service mix. However, the distribution of responses also suggests that diversification remains uneven and investment-dependent.

Self-assessed Business Viability (Next 5-10 Years)

Comment: Business confidence is cautious but generally stable.

Response	Count	Visualisation
Moderate	**11 (44%)**	
High	**5 (20%)**	
Prefer not to answer	**4 (16%)**	
Very high	**3 (12%)**	
Prefer not to answer	**2 (8%)**	

Key Insight: Business confidence is mixed rather than uniformly pessimistic. 44.0% of respondents rate viability as moderate, while 32.0% express high or very high confidence. At the same time, 8.0% report low confidence and 16.0% prefer not to answer. This combination points to a sector that is not resigned, but cautious. Operators appear to see opportunities in local service adaptation and electrification, while remaining concerned about margins, capital requirements and uncertain demand.

Insights from VET Trainer Interviews in France

The 13 VET trainer responses reinforce this interpretation. Trainers describe a sector in transition, but with highly unequal preparedness depending on business size, ownership structure and access to investment. Several responses distinguish between large groups, which are perceived as better prepared, and independent operators, who are described as financially fragile and less equipped to anticipate change. Trainers repeatedly frame the French transition as both technical and economic: the question is not only whether retailers understand alternative energies, but whether they can translate new knowledge into viable local business models.

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Key Insight: The French national context is defined by rurality, proximity services and investment constraints. Training for this audience must therefore connect green transition content to concrete business survival: maintaining local relevance, financing infrastructure, and diversifying services without overburdening small operators.

2.2.2 Germany

This section summarises responses to Questions 1 to 5, capturing the structural and operational profile of the 25 fuel retailers surveyed across Germany. Pardon brevity/mistakes as the text has been translated from German to English.

Business Scale: Number of fuel Stations Operated

Response	Count	Visualisation
More than 10 stations	**18 (72%)**	
6- 10 stations	**3 (12%)**	
2 - 5 stations	**2 (8%)**	
Single station	**2 (8%)**	

Key Insight: 72% of respondents are large-scale operators running more than 10 stations. The sample is skewed toward multi-site operators, suggesting the findings are most representative of medium-to-large fuel retail enterprises in Germany.

Years of Experience in Fuel Retail

Response	Count	Visualisation
More than 10 years	**20 (80%)**	
5 -10 years	**3 (12%)**	
3- 5 years	**1 (4%)**	

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Less than 3 years	**1 (4%)**	

Key Insight: 80% of respondents have over 10 years of sector experience. This is a highly experienced cohort, indicating that skills gaps identified are not due to inexperience but rather structural and technological transformation challenges.

Primary Business Location

Response	Count	Visualisation
Rural	**12 (48%)**	
Suburban	**7 (28%)**	
Urban	**6 (24%)**	

Key Insight: 48% of respondents operate primarily in rural areas. This has important implications for training delivery – rural operators face different competitive dynamics and infrastructure challenges than urban counterparts, and may require more flexible/remote training formats.

Services Currently Offered

Respondents selected all applicable services. The table below shows distinct service combinations by frequency:

Service Combination	Count	Share
Fuel + Car wash + Food/coffee + Convenience store + Other	**8**	**32%**
Fuel + Car wash + EV charging + Food/coffee + Convenience store + Other	**8**	**32%**
Fuel only	**3**	**12%**
Fuel + Car wash + Food/coffee	**2**	**8%**
Fuel + Car wash + EV charging + Food/coffee	**2**	**8%**
Fuel + Car wash only	**1**	**4%**
Food/coffee services only	**1**	**4%**

Key Insight: 64% of operators already offer EV charging alongside fuel - indicating that multi-energy service transformation is already underway. 88% offer non-fuel ancillary services, confirming that diversification is the norm, not the exception.

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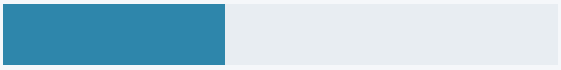
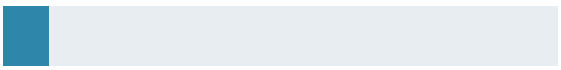
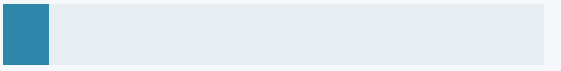
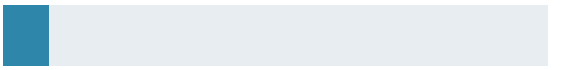
Self-assessed Business Viability (Next 5-10 years)

Response	Count	Visualisation
High	12 (48%)	
Moderate	10 (40%)	
Low	1 (4%)	
Very high	1 (4%)	
Prefer not to answer	1 (4%)	

Key Insight: 88% rate their business viability as moderate-to-high over the next decade, suggesting cautious optimism despite acknowledged transformation pressures. Only 4% rate viability as low – resilience is high, but preparedness remains a gap.

Insights from VET Trainer Interviews in Germany

Insights from stakeholder interviews on fuel station transformation Ten interviews were conducted regarding the future role and evolution of fuel stations. Providing their perspectives on the changing mobility landscape provides essential qualitative context for the strategic and operational shifts required within the fuel retail sector.

Based on the interviewees' insights, the sector is undergoing a profound structural evolution:

- **The Rise of Mobility Hubs:** Interviewees strongly support the transition of traditional fuel stations into broader mobility service providers. To remain relevant, stations must build on their locations to combine energy provision with food, beverages, car washes, and diverse convenience offers.
- **Strategic Retail Transformation:** There is a clear shift away from purely technical, vehicle-related services toward retail, marketing, and customer-oriented experiences. Large fuel retailers must increase their strategic awareness and knowledge to successfully adapt their business structures to these new realities.

On the specific topics of alternative energies and on-site operations, the interviews demonstrated a clear consensus regarding the practical challenges and requirements of the green transition:

- **Multi-Energy Station Models:** Transformation is already visible. Future stations must accommodate a much broader energy mix, integrating conventional fuels alongside HVO, e-fuels, bioethanol blends (E10, E20), and EV charging infrastructure.
- **Managing Operational Complexity:** The growing variety of powertrains and expanded service offerings significantly increases complexity for station staff. Navigating this shift requires on-site personnel to develop a stronger foundation in basic product understanding.
- **Customer Education and Communication:** The introduction of new fuels and energy solutions necessitates much clearer communication at the station level. This transformation must be framed as an opportunity, requiring active education for both retail staff and everyday customers.

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Expert interviews suggest that the German fuel retail sector is already moving beyond the traditional logic of fuel sales. Interviewees emphasised that stations have a strategic advantage due to their location and may remain viable if they develop additional services, customer support and mobility related offers. The additional interviews sharpen this picture by showing that the future station is likely to combine several functions: charging, conventional fuels, HVO, e fuels, biofuel blends such as E20, car wash, food and drink, convenience retail and customer support. This transformation does not only concern the energy offer, but also the role of the site as a retail and service environment. At the same time, experts warned that the expansion of charging infrastructure is constrained by grid capacity and net congestion, while the growing variety of products and services increases operational complexity for staff.

The expert interviews also nuance the relatively optimistic survey results. While many retailers assess their viability as moderate to high, interviewees described the sector as conservative, unevenly prepared and strongly dependent on investment capacity, site location and management quality. Larger operators are more likely to have the capital and organisational structures needed to develop mobility hub concepts, while smaller or rural stations may struggle to finance such upgrades. Business confidence should therefore not be interpreted as full transformation readiness, but rather as cautious resilience under uncertain conditions.

2.2.3 Greece

This section captures the structural and operational profile of the 26 fuel retailers surveyed in Greece and drawing on insights from the 10 VET trainer interviews, mapping the current sector status and baseline awareness of the green transition among Greek fuel retail operators.

Business Scale: Number of Fuel Stations Operated

Response	Count	Visualisation
2 - 5 stations	**2 (7.7%)**	
Single station	**24 (92.3%)**	

Key Insight: 92.3% of respondents are single-station operators. The Greek fuel retail market is characterised by micro-enterprises: atomised, largely independent, and operating with limited capital reserves. This structural fragmentation has significant implications for training design and investment capacity.

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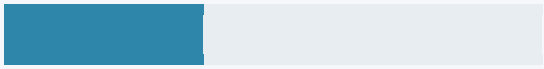
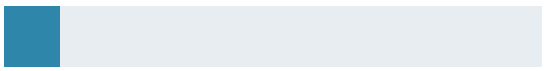
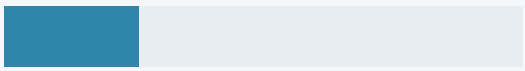
Years of Experience in Fuel Retail

Response	Count	Visualisation
More than 10 years	**13 (50%)**	
5 -10 years	**9 (34.6%)**	
3- 5 years	**4 (15.4%)**	

Key Insight: 84.6% of respondents have 5 or more years of experience, and nobody has fewer than 3 years. This is a mature, established workforce, but one whose deep familiarity with the traditional operating model may heighten resistance to transformation. Skills gaps are therefore not due to inexperience, but to the pace and complexity of sectoral change.

Primary Business Location

Response	Count	Visualisation
Rural	**11 (42.3%)**	
Suburban	**5 (19.2%)**	
Urban	**10 (38.5%)**	

Key Insight: The Greek sample is geographically balanced across rural (42.3%), urban (38.5%) and suburban (19.2%) settings. Rural operators face lower customer density and greater infrastructure constraints; urban operators contend with stronger competition and higher operating costs. Training delivery formats must reflect these divergent realities.

Services Currently Offered

Responses	Mentions	Share
Fuel + Convenience store	**9**	**34.6%**
Fuel + Food/coffee	**1**	**3.9%**
Fuel only	**7**	**26.9%**
Fuel + Car wash + Convenience store	**3**	**11.5%**
Fuel + Car wash + EV charging	**2**	**7.7%**
Fuel + Car wash only	**3**	**11.5%**

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Fuel + Car wash + Food/coffee	**1**	**3.9%**

Key Insight: 73.1% of Greek operators already offer at least one complementary service alongside fuels, indicating that diversification is underway. Only 2 stations (7.7%) provide EV charging, both in rural areas, signalling that green infrastructure investment is at its earliest stage in Greece.

Self-assessed Business Viability (Next 5-10 Years)

Response	Count	Visualisation
High	**4 (15.4%)**	
Moderate	**15 (57.7%)**	
Low	**4 (15.4%)**	
Prefer not to answer	**3 (11.5%)**	

Key Insight: Only 15.4% of Greek operators express strong confidence. 57.7% rate viability as only moderate, and a combined 26.9% either see low prospects or decline to answer. This signals significant existential anxiety in the Greek sector, driven by thin margins, high taxation, regulatory uncertainty and limited access to transition financing.

Insights from VET Trainer Interviews in Greece

Ten VET trainers were interviewed in Greece. Providing their responses assessing the state of the green transition and the most critical skills needed provide essential qualitative context for the quantitative findings above.

On the state of the sector, trainers converge around three themes:

- **Transformation is underway but uneven:** stations are gradually repositioning from single-purpose refuelling points to multi-service hubs, but the pace of change varies considerably.
- **The transition is simultaneously green and digital:** operators cannot address one without the other. New services, customer communication and operational management all require digital tools that many operators are not yet comfortable using.
- **Readiness is moderate at best:** while awareness is growing, many operators lack the skills, strategic direction or financial resources to adapt fully.

On the skills most needed in the coming years, trainers identified five priority areas:

- **Adaptability:** the capacity to accept change, learn and reorient in a sector accustomed to stable routines.
- **Strategic thinking (for managers):** reading market trends, evaluating investment options and leading teams through transition.
- **Communication skills:** active listening, clear explanation and confidence in handling customer questions about new energy types.

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- **Technical foundations:** safety, regulatory compliance, equipment checks and incident response remain critical and are becoming more demanding.
- **Basic digital literacy:** confidence in working with new systems, service data and digital customer tools.

2.2.4 Italy

The national research analysis for the inFUELencer project in Italy has been carried out during the first quarter of 2026, combining both online survey dissemination and direct field engagement with fuel retailers and operators. Data collection strategy relied on a mixed-method approach, including the distribution of questionnaires and collection of feedbacks through digital channels, trying to engage more than 75 stakeholders via targeted emails and communications to micro-SMEs, fuel retailers, sectoral networks, associations and larger companies (like FAIB – Federazione Autonoma Italiana Benzinai; FIGISC – Federazione Italiana Gestori Impianti Stradali Carburanti; FEGICA – Federazione Gestori Impianti Carburanti; ANGAC – Associazione Nazionale Gestori Autonomi Carburanti; FEGESCA – Federazione Gestori Carburanti e Affini; Assopetroli-Assoenergia; …), as well as in-person interactions and interviews conducted directly at fuel stations with retailers.

While the initial outreach through online channels ensured broad visibility of the survey, the response rate highlighted several structural barriers to engagement within the sector.

Considering the fuel retailers analysis, the dataset covers the expected 25 completed retailer responses. As mentioned, a significant proportion of the data was ultimately collected through direct interviews and face-to-face engagement, which proved more effective in encouraging participation: this approach allowed for richer qualitative insights but also led to a geographical concentration of responses, with the majority of interviews conducted in the Vicenza area and the wider Veneto Region (Padova, Mestre, Venezia areas). To mitigate this limitation and ensure a broader perspective, approximately 25% of responses were collected from other Italian regions (Tuscany and the Rome area). This phase engaged 4 members of the Microfinanza team. While the dataset provides valuable and in-depth insights into the Italian fuel retail sector, with particular attention in Northern Italy, it may reflect regional specificities, such as infrastructure development, market maturity and exposure to energy transition dynamics. Still, it's important to consider that at the same time, the consistency of responses across regions suggests that many of the identified challenges and trends are structural and widely shared across the country.

Overall, the Italian data collection process highlights both the operational constraints faced by fuel retailers and the importance of direct engagement strategies in capturing meaningful insights. These factors are key to understand the context in which the survey results were generated and for interpreting the findings presented in the next paragraphs.

As mentioned, and shared in the inFUELencer proposal analysis, the fuel sector is not in denial about transition, but is still struggling to convert awareness into operational readiness in Italy: this distinction is key and reflected also in the field research. Entities and beneficiaries engaged do not generally reject the direction of travel set by decarbonisation policy, electrification and new mobility models; rather, they appear to consider the transition through the lens of economic survival and sustainability, investment risk and implementation complexity. This is fully consistent with the project logic, where business viability and transformation as inseparable challenges for fuel retailers in the context of the EU Green Deal. Italy still has a very extensive fuel retail network, and public policy continues to monitor

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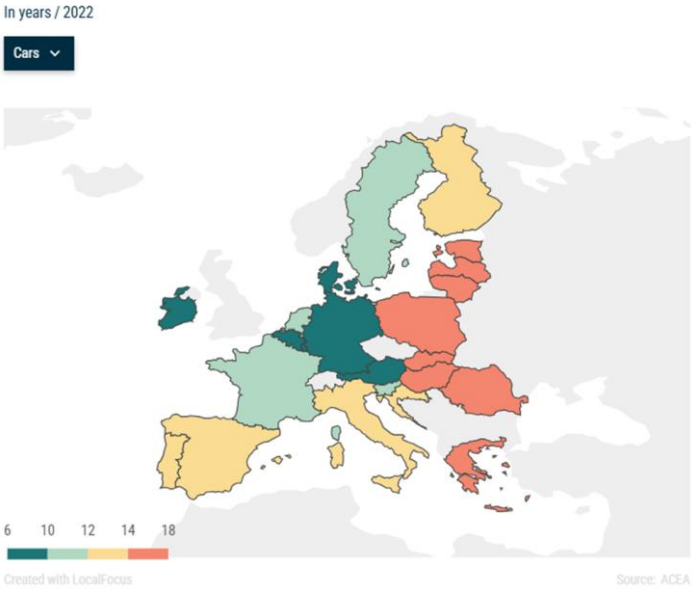
the sector closely through the national registry of active filling stations and daily fuel-price transparency mechanisms (https://www.mimit.gov.it/it/open-data/elenco-dataset/carburanti-prezzi-praticati-e-anagrafica-degli-impianti). At the same time, the mobility landscape is changing profoundly: public EV charging infrastructure in Italy reached more than 64k charging points at the end of 2024 (https://www.motus-e.org/news-associative/auto-elettriche-litalia-supera-i-64-391-punti-di-ricarica-a-uso-pubblico-tutti-i-dati-e-il-confronto-con-leuropa/), with almost 6k in Veneto, and 57% of all charging points concentrated in the North, with a greater and greater exposure to the practical implications of electrification even if customer demand is still uneven. It's also important to consider that there's another relevant "pressure" on the environment: Italy's commercial vehicle fleet remains relatively "old" by EU standards: according to ACEA (https://www.acea.auto/figure/average-age-of-eu-vehicle-fleet-by-country/), among the EU's major markets, Italy has the oldest van fleet (avg. age of 14.7 years).



This means fuel retailers are serving a market that is still heavily reliant on traditional fuels, while simultaneously being asked to invest for innovation and a different future. That tension is visible throughout the survey: respondents recognise that change is coming, but many do not yet see a low-risk pathway for adapting their business model. Main findings in Italy point to a sector caught between two aspects: on the one hand, in terms of the legacy business model, this is still anchored in traditional fuels, convenience services and local customer relationships; on the other one, there's an emerging multi-energy and service-based model that requires new knowledge, competencies, infrastructure, partnerships and a stronger ability to interpret regulation and be compliant with them.

In more specific terms, the fuel retailer sample considered is diverse enough to capture both smaller operators and a more structured business. In terms of business size, the majority of respondents came from businesses with 2-5 stations (40%), followed by operators with more than 10 stations (24%) and single-site businesses (24%), and finally 6–10 stations (12%). There's no "domination" of micro-operators, despite "independent" retailers and no-logo "Pompe Bianche" have been prioritised. Thus, the analysis includes respondents with broader network management responsibilities.

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Business Scale: Number of Fuel Stations

Response	Count	Visualisation
Single Station	**6 (24%)**	
More than 10 stations	**6 (24%)**	
2 - 5 stations	**10 (40%)**	
6 – 10 stations	**3 (12%)**	

Considering the sector experience, the sample seems also relatively experienced: the highest share of respondents reported more than 10 years of experience (44%), followed by 5–10 years (28%) and 3-5 years of experience (16%); only 12% had less than three years of experience. Responses reflect operational familiarity and at some direct exposure to the recent transformation pressures in the sector.

Years of Experience in Fuel Retail

Response	Count	Visualisation
More than 10 years	**11 (44%)**	
5 -10 years	**7 (28%)**	
3 - 5 years	**4 (16%)**	
Less than 3 years	**3 (12%)**	

Fuel retailers engaged in the sample are mainly based in urban and suburban/peri-urban areas (36%). 28% are in rural and peripheral areas. This geographical distribution suggests that findings are shaped by metropolitan dynamics, but also by less densely populated settings where customer demand, infrastructure readiness and investment returns may develop more slowly.

Primary Business Location

Response	Count	Visualisation
Rural	**7 (28%)**	
Suburban	**9 (36%)**	
Urban	**9 (36%)**	

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It is important to consider a quote by one retailer on this matter: “in rural areas, the issue as it stands is not particularly relevant, since these are generally small, family-run businesses with a limited customer base that bear an even greater burden of fuel and parts transportation costs. Fuel costs were already higher in these areas due to their distance from supply centres, and the current price hikes are absolutely prohibitive. However, having a loyal customer base thanks to minor maintenance services, tires, and other offerings helps keep these businesses afloat. Electric cars do not seem to be an issue for these areas, as it is impossible to use them here. There are some, but they are limited, and those who use them do so because they gravitate toward the city, where they can recharge more easily. In any case, electric vehicles do not address the need to reduce fuel consumption, because other territories are being devastated for rare earths, and there is the whole issue of battery disposal, as we do not know where they will end up or how they will be handled”.

To this matter, it’s key to consider that all respondents offer conventional fuel sales. Beyond that, the most common additional services are car wash (64%), other retail/convenience services (60%), and bar/food services (44%), with GPL/methane available at 40% of sites. Only 8% (2 respondents) currently offer EV charging. That’s one of the clearest findings in the survey: fuel retailers already operate diversified service stations, but the shift from service diversification to genuine energy diversification is still at a very early stage.

Services Currently Offered

Service Combination	Count	Share
Fuel	**25**	**100%**
LPG/CNG sales	**10**	**40%**
Car wash	**16**	**64%**
EV charging	**2**	**8%**
Food/coffee services	**11**	**44%**
Other services	**15**	**60%**

Finally, it’s important to consider that despite the pressures perceived, respondents remain relatively optimistic about their medium-term business viability: 56% rated it as “moderate”, while 16% as low. It’s important to consider that the 28% “preferred to not respond”. Concern about transition does not necessarily translate into immediate pessimism: rather, retailers seem to believe the business can remain viable, provided they are supported (especially by the State) in managing this change.

Business Viability

Response	Count	Visualisation
Moderate	**14 (56%)**	
Low	**4 (16%)**	
Prefer not to answer	**7 (28%)**	

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2.2.5 Poland

This section maps the current operational landscape and baseline awareness of the green transition among Polish fuel retailers, drawing heavily on qualitative insights from retailers and VET trainers.

Business Scale: Number of Fuel Stations Operated

Response	Count	Visualisation
Single Station	**11 (44%)**	
More than 10 stations	**1 (4%)**	
2 - 5 stations	**8 (32%)**	
6-10 stations	**6 (24%)**	

Key Insight: 44% of respondents are single-station operators, and a combined 56% operate a few stations (up to 10), with zero respondents representing large networks of over 10 stations. While large fuel retail networks do exist in Poland, they frequently operate on a franchise model, meaning the market is essentially driven by micro-enterprises and small independent owners.

Years of Experience in Fuel Retail

Response	Count	Visualisation
More than 10 years	**6 (24%)**	
5 -10 years	**9 (36%)**	
3- 5 years	**8 (32%)**	
Less than 3 years	**2 (8%)**	

Key Insight: 60% of respondents have 5 or more years of experience, and a combined 92% have been in the sector for at least 3 years. This remains a predominantly mature and established workforce. Their deep familiarity with the traditional, fossil-fuel-centric operating model may heighten resistance to the green transition. Therefore, the identified skills gaps are largely not a result of

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general business inexperience, but rather the unprecedented pace, technical complexity and transformational nature of the current sectoral changes that are reshaping the industry.

Primary Business Location

Response	Count	Visualisation
Rural	**14 (16%)**	
Suburban	**13 (52%)**	
Urban	**8 (32%)**	

Key Insight: The Polish sample is heavily concentrated in suburban (52%) and urban (32%) settings, with a much smaller rural presence (14%). Suburban and urban operators typically contend with stronger competition, higher operating costs and more immediate pressure to adopt new technologies like EV charging; meanwhile, rural operators face lower customer density and greater infrastructure constraints. Training delivery formats must reflect these divergent realities while prioritising the dominant suburban and urban operational contexts.

Services Currently Offered

Service Combination	Count	Share
Fuel	**25**	**100 %**
Car wash	**18**	**72%**
Other services	**6**	**24%**
EV charging	**6**	**24%**
Food / coffee	**15**	**60%**

Key Insight: A significant majority of Polish operators already offer complementary services alongside fuels, with 72% providing car washes and 60% offering food/coffee services, indicating that robust service diversification is well underway. Furthermore, 6 stations (24%) already provide EV charging, signalling that green infrastructure investment is gaining noticeable traction in the Polish market.

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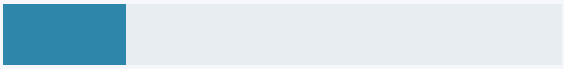
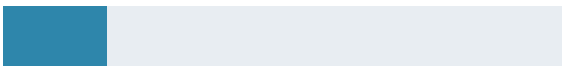
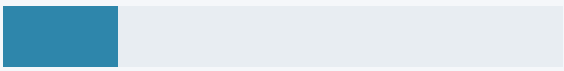
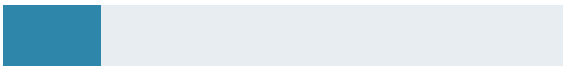
Self-assessed Business Viability (Next 5-10 Years)

Response	Count	Visualisation
Moderate	15 (60%)	
High	2 (8%)	
Prefer not to answer	4 (16%)	
Very high	1 (4%)	
Low	3 (12%)	

Key Insight: Only 12% of Polish operators express strong confidence (rating viability as high or very high). 60% rate their viability as only moderate, and a combined 28% either see low prospects or decline to answer. This signals significant existential anxiety and uncertainty in the Polish sector, driven by extreme daily operational pressures, regulatory uncertainty, and a "dual-speed" reality where independent operators lack the capital and long-term strategic vision to navigate the transition.

Insights from VET Trainer Interviews in Poland

Ten VET trainers were interviewed in Poland. Providing their responses regarding their professional experience and past training delivery provides essential qualitative context for the types of instructional expertise available to support the Polish fuel retail sector's transition.

Based on the trainers' background and experience, the sample represents a highly experienced cohort:

- **Solid Professional Tenure:** All interviewed trainers possess between 3 and 10 years of experience in vocational education and adult training. Many specifically focus their efforts on employees within the service and retail sectors.
- **Evolution of Expertise:** Several trainers noted a shift in their own teaching careers, evolving from general soft skills training toward more complex, structural topics like business operations, efficiency and organisational change.

On the specific topics of business viability and transformation, the trainers demonstrated strong foundational alignment with the skills needed for the green transition:

- **Focus on Profitability and Efficiency:** Almost all trainers have practical experience teaching operational efficiency, cost optimisation and overarching business profitability.
- **Adapting Business Models:** Trainers have frequently led workshops dedicated to helping traditional companies adapt to changing market realities, diversify their revenue streams and better use their existing resources.
- **Introduction to Sustainability:** Several trainers have already incorporated the basics of sustainable development and ESG fundamentals into their curricula, providing a vital baseline for future training, even if these past sessions were not exclusively tailored to the fuel sector.

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3. Knowledge & Skills Needs and Challenges

3.1 Transnational Overview

The transnational analysis of knowledge, skills needs and transformation challenges shows that the European fuel retail sector is not facing a simple information gap. Across France, Germany, Greece, Italy and Poland, the findings point to a deeper implementation gap: operators increasingly recognise that the green transition, electrification, alternative fuels, digitalisation and new regulatory frameworks will reshape their businesses, but many do not yet have the practical skills, financial tools or strategic confidence to act. This distinction is essential. The sector is not generally in denial about transition. Rather, many retailers understand that change is coming but remain uncertain about what it means for their specific station, what investments are realistic, which technologies will become viable, and how they can protect business continuity during the process.

Across the consortium, the most common operational challenges are economic pressure, regulatory uncertainty, investment limitations, uneven customer demand and the lack of accessible sector-specific training. These barriers appear in different forms in each country, but they are closely connected. Fuel retailers are being asked to adapt at a time when many are already dealing with tight margins, rising costs and unstable market conditions. For small and independent operators, especially in France, Greece and Poland, the green transition is therefore not experienced only as an environmental or technological agenda. It is experienced as a business viability challenge. This explains why skills needs are strongly linked to finance, regulation and operational risk, rather than only to technical knowledge.

France illustrates this clearly. The French data shows that the main barriers are not reluctance or lack of interest, but cost, demand and capacity. Fuel margins, competition, operating costs and regulatory uncertainty shape the business environment, while installation costs and low customer demand limit the adoption of new technologies. In a rural market dominated by small operators, the decision to install EV charging or diversify energy services cannot be treated as a straightforward sustainability choice. It depends on whether demand will be sufficient, whether space is available, whether the business can finance the investment, and whether the regulatory environment is clear enough to reduce risk. The French findings therefore show why technical transition support must be paired with financial planning and business model adaptation.

Greece presents an even sharper version of this viability problem. Greek retailers identify taxation, operating costs and installation costs as central pressures, with regulatory barriers and lack of technical knowledge also limiting technology adoption. This confirms that operators may recognise the importance of new fuels, digital tools or energy infrastructure, but still hesitate to act because the cost environment is too restrictive. One of the strongest insights from the Greek section is that sustainability becomes relevant for small operators only when it is translated into operational benefit and market positioning. This is a crucial point for the whole consortium: training will not be effective if it presents the green transition as an abstract obligation. It must show how new knowledge can support survival, competitiveness and customer relevance.

In Germany, the challenge landscape is different but still confirms the same broader pattern. German respondents show relatively higher awareness of transformation pressures and stronger evidence of diversification, yet preparedness remains incomplete. Operating costs, regulatory uncertainty and investment capacity continue to slow transition efforts. The German expert interviews also show that the move from traditional fuel retail to multi-energy and mobility-service models creates new operational complexity. Staff will need to understand a broader range of fuels and powertrains, while managers will need stronger strategic knowledge to adapt their business structures. The German case therefore demonstrates that even where the sector is more advanced, transformation creates new skills requirements rather than reducing them.

Italy highlights the tension between awareness and operational readiness. Retailers recognise the direction set by decarbonisation policy, electrification and new mobility models, but many still view the transition through the lens of economic survival, investment risk and implementation complexity. This

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is particularly important because Italy's market remains strongly anchored in conventional fuels while simultaneously being exposed to growing EV infrastructure and new mobility expectations. The Italian findings suggest that retailers are not rejecting transition; they are struggling to identify a low-risk pathway for adapting their business model. The VET provider insights reinforce this, noting that training resources exist but are scattered, rarely tailored to fuel retail, and not yet organised into an integrated curriculum linking fuels, mobility, energy transition and business transformation.

Poland shows a strong alignment between perceived business threats and skills needs. Polish respondents identify specialised skills shortages, technical knowledge of alternative fuels, EV infrastructure management and financial planning as central gaps. The qualitative trainer insights add an important social dimension: smaller station employees and managers may feel stressed or fearful because public discussion of the green transition does not always explain what it means for their actual roles. One trainer notes that people are afraid they may lose their jobs if traditional fuel demand declines. This makes clear that skills development is not only technical. It also has to address uncertainty, confidence and the perceived value of new competences for workers' future employability.

The most commonly shared skills gaps across the consortium form a coherent competence cluster. The first gap is technical knowledge of alternative fuels and new energy systems. This includes biofuels, HVO, e-fuels, hydrogen, blended fuels, EV charging and other emerging solutions. Retailers need to understand not only what these technologies are, but how they affect site operations, customer communication, safety procedures, supplier relationships and business positioning. The second gap is EV infrastructure management. This includes installation decisions, charger operation, maintenance, troubleshooting, customer support, energy demand, grid constraints and the integration of charging into the wider service offer of the station.

The third shared gap is financial planning for transformation. This is one of the most important findings because it connects almost every other barrier. Operators may be interested in new services, but without the ability to assess investment costs, expected returns, funding sources, demand scenarios and risk exposure, transition remains too abstract or too risky. Financial planning is particularly important for small and rural stations, where unsuccessful investment can threaten the viability of the entire business. For this reason, the future curriculum should treat financial literacy not as a secondary business topic, but as a core transition competence.

The fourth shared gap is regulatory compliance and policy literacy. Across the partner countries, regulation is often perceived as both a driver and a barrier. Retailers know that environmental and market regulations will affect them, but they do not always understand the practical implications or the timeline of change. This produces anxiety and delay. In Greece, regulation is strongly associated with taxation and barriers. In Germany, operators seek clearer frameworks and planning stability. In Poland, regulatory anxiety translates into demand for strategic guidance. In France and Italy, regulatory uncertainty interacts with investment risk. The curriculum should therefore translate regulation into practical operational guidance: what businesses must comply with, what is changing, what support exists, and how operators can plan ahead.

The fifth shared gap is digital competence. Digitalisation appears in different ways across the countries: smart station management, digital payment tools, data-driven decision-making, customer communication, service integration, mobile applications and operational monitoring. Digital skills are becoming more important because the future fuel station is not only an energy point; it is also a data-managed service environment. As stations add charging, retail, convenience services and customer support functions, digital tools become necessary for efficiency, communication and competitiveness. However, the level of digital confidence among small operators and frontline staff remains uneven, which means training must be accessible and practical rather than overly technical.

The VET trainer and educator inputs add another important layer: the skills gap does not exist only among fuel retailers. It also affects the training ecosystem. In several national contexts, trainers note that available materials are fragmented, generic, overly technical or designed for other sectors. Polish trainers describe existing materials as written in the language of "engineers and lawyers", making them inaccessible to average station managers or sales staff. Italian VET providers similarly note that

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resources are scattered and that there is no integrated curriculum linking fuels, mobility, energy transition and business transformation. This means that the inFUELencer project must address both sides of the learning process: it must provide retailers with practical training, but it must also equip trainers with updated, sector-specific tools.

A further qualitative insight concerns the limits of traditional VET provision. In Poland, trainers describe existing training as focused mainly on legacy compliance, such as health and safety, cash handling or hazardous materials procedures. In Italy, VET providers call for applied learning, workshops, local events and stronger partnerships with industry and policymakers. In Greece, trainers emphasise that sustainability training must be connected to operational benefit and market positioning. In Germany, expert interviews point to increasing complexity at station level as different fuels, charging services and customer expectations come together. These insights confirm that traditional, compliance-oriented training is no longer sufficient. The sector needs transformation-oriented training that connects technical change with business strategy and daily operations.

The findings also show that training access remains a major weakness. In France, access to relevant training is particularly limited, with most respondents reporting that it is not easy or only slightly easy to access suitable opportunities. Poland also shows low participation in recent sustainability-related training, despite strong awareness of skills gaps. Germany has a substantial group of operators who have not participated in such training, even though demand for flexible and practical learning is high. Greece and Italy similarly point to gaps in relevant, targeted provision. This suggests that the issue is not only whether retailers are willing to learn. It is whether training is available in formats they can realistically attend, with content they recognise as useful.

The transnational evidence therefore points to a clear training need: a modular, practical and sector-specific curriculum that brings together technology, finance, regulation, digitalisation and customer-facing skills. These areas should not be treated as separate modules with no connection between them. A retailer deciding whether to install EV charging, for example, needs to understand the technology, the cost, the regulation, the customer demand, the digital systems and the operational implications for staff. Similarly, a station exploring alternative fuels needs product knowledge, supplier information, safety guidance, customer communication tools and a strategy for market positioning. The curriculum should therefore be designed around real business decisions rather than abstract topics.

Overall, the transnational findings show that the fuel retail workforce needs an integrated transformation skillset. The most urgent needs are alternative fuel literacy, EV infrastructure management, financial planning, regulatory navigation, digital competence, strategic business adaptation and customer communication. The main barriers are rising costs, investment risk, unclear regulation, uneven demand, fragmented training resources and psychological uncertainty about the future of work. The inFUELencer curriculum should therefore aim to convert concern into capability. Its value will depend on whether it can make the green transition understandable, operational and economically relevant for the people who run and work in fuel stations every day.

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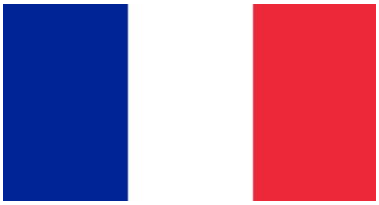
3.2 National Contexts

3.2.1 France



This section presents the knowledge and skills landscape identified in the French fuel retailer survey, complemented by the VET trainer responses. The French results show a pronounced gap between awareness that change is coming and confidence in the ability to manage that change. This gap is particularly visible around EV infrastructure, financial planning, regulation and digital skills.

Familiarity with the European Green Deal and Decarbonisation Policies

Comment: Awareness of European sustainability policies remains relatively limited.

Response	Count	Visualisation
Slightly aware	**11 (44%)**	
Not at all aware	**9 (36%)**	
Extremely aware	**3 (12%)**	
Fairly aware	**2 (8%)**	

Key Insight: Awareness levels are generally low, with **80% of respondents either slightly aware (44%) or not at all aware (36%)**. Only a small share shows strong awareness (**12% extremely aware, 8% fairly aware**), indicating a significant need for improved communication and visibility.

Perceived Impact of Environmental Regulations

Comment: Most operators still expect environmental regulation to affect their activities.

Response	Count	Visualisation
Moderately	**13 (52%)**	
Significantly	**9 (36%)**	
Slightly	**3 (12%)**	

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Key Insight: A strong majority reports a meaningful impact, with **52% indicating moderate impact** and **36% significant impact**, while only **12% report slight impact**, suggesting the effect is widely perceived as substantial.

Need for Major Business Model Changes

Comment: Business model adaptation is perceived as necessary by most respondents.

Response	Count	Visualisation
Yes	**13 (52%)**	
Not sure	**7 (28%)**	
No	**5 (20%)**	

Key Insight: 52% expect their business model will require significant change. A further 28% are unsure – representing an audience that needs scenario-based learning to understand what transformation might look like for them.

French retailers display limited policy literacy. 44.0% are only slightly aware of the European Green Deal, and 36.0% are not aware at all. Only 20.0% describe themselves as fairly or extremely aware. Yet 88.0% still expect environmental regulations to affect their business at least moderately, including 36.0% who expect a significant impact. This is a central tension in the French dataset: retailers feel the consequences of the transition, but many do not yet master the policy framework shaping it.

Key Insight: Low awareness of the European Green Deal does not mean low exposure to transition pressure. French respondents largely expect regulatory impact, but they lack the structured knowledge needed to anticipate, plan and negotiate the transition on favourable terms.

Anticipated Trends with Greatest Business Impact

Comment: Electrification is seen as the main future trend impacting the sector.

Expected Trend	Mentions	Visualisation
Electrification	**18 (72%)**	
Declining demand for fossil fuels	**14 (48%)**	
Competition / new mobility entrants	**9 (36%)**	
New taxation	**8 (32%)**	

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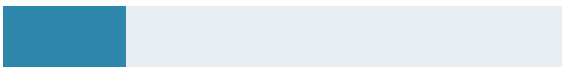
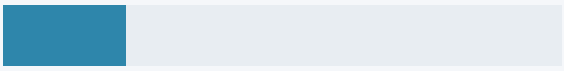
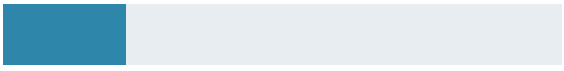
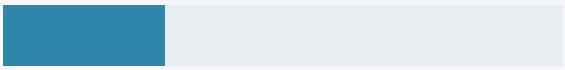
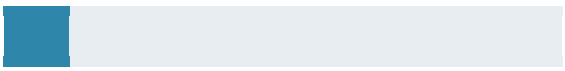
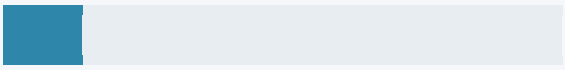
Biofuels / alternative fuels	**5 (20%)**	
Digitalisation	**5 (20%)**	
Skills shortage	**5 (20%)**	

Electrification is the dominant perceived trend, mentioned by 72.0% of respondents, followed by declining demand for fossil fuels at 56.0%. This differentiates the French profile from contexts where taxation is the primary concern. The French sample appears to interpret the transition first through changes in mobility and demand. Open responses confirm this: several respondents explicitly refer to installing electric charging points, while one respondent describes the future station as a local service point that must remain simple, accessible and embedded in the territory.

Self-assessed Skills to Support Sustainable Fuel Retail

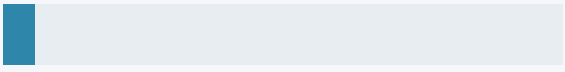
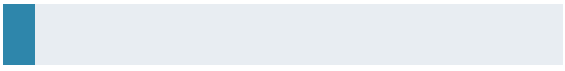
Comment: Respondents do not yet feel fully equipped with sustainability-related skills.

Response	Count	Visualisation
Partially capable	**13 (52%)**	
Not at all capable	**7 (28%)**	
Moderately capable	**3 (12%)**	
Significantly capable	**2 (8%)**	

Key Insight: A majority of respondents feel insufficiently prepared, with **52% only partially capable** and **28% not at all capable**. Only a limited share reports higher capability (**12% moderately, 8% significantly**), highlighting a clear skills gap in sustainability.

Confidence with Alternative Fuels and EV Technologies

Comment: Confidence in alternative fuels and EV technologies remains low.

Response	Count	Visualisation
Slightly confident	**19 (76%)**	
Not at all confident	**2 (8%)**	
Very confident	**2 (8%)**	

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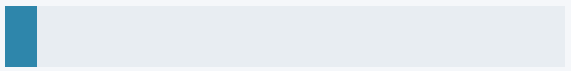
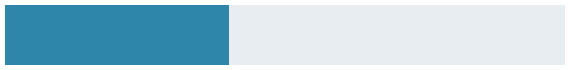
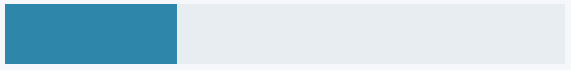
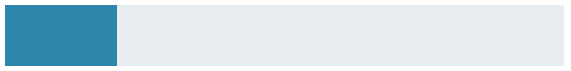
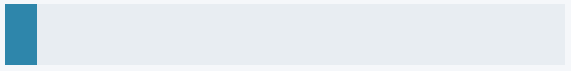
Fairly confident	**2 (8%)**	

Confidence levels are very low when questions become operational. 76.0% feel only a little confident with alternative fuels and EV charging technologies, while 8.0% are not confident at all.

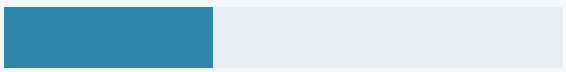
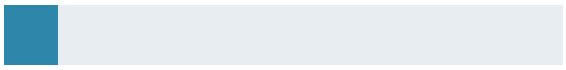
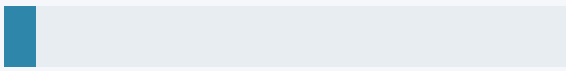
Interest in Exploring New Business Models & Diversification Strategies

Response	Count	Visualisation
Moderately interested	**10 (40%)**	
Very interested	**8 (32%)**	
Slightly interested	**5 (20%)**	
Not at all interested	**2 (8%)**	

Key Insight: 72% are moderately or very interested in new business models. This is a strong foundation for curriculum engagement – content on strategic adaptation will find a receptive audience.

Preparedness to Adapt to Sustainability-driven Changes

Comment: Preparedness for sustainability-driven change is still limited.

Response	Count	Visualisation
Not at all prepared	**12 (48%)**	
Slightly prepared	**10 (40%)**	
Moderately prepared	**2 (8%)**	
Very prepared	**1 (4%)**	

Preparedness is even more concerning: 48.0% feel not prepared at all, and 40.0% only slightly prepared. Only one respondent reports being very prepared. These figures suggest that French retailers understand the direction of travel, but do not yet feel equipped to implement it.

Key Insight: Only 4% feel very prepared for sustainability-driven business changes. 48% feel only slightly or not at all prepared. The curriculum must bridge this preparedness gap with practical, scenario-based content.

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Self-identified Knowledge Gaps

Comment: Knowledge gaps focus on EV infrastructure, finance and regulation.

Response	Count	Visualisation
EV infrastructure management	**21 (84%)**	
Financial planning for transformation	**20 (80%)**	
Regulatory compliance	**15 (60%)**	
Digital skills	**12 (48%)**	
Technical knowledge of alternative fuels	**10 (40%)**	

The hierarchy of knowledge gaps is highly coherent. EV infrastructure management is cited by 84.0% of respondents, financial planning for transformation by 80.0%, regulatory compliance by 60.0%, digital skills by 48.0%, and technical knowledge of alternative fuels by 40.0%. This cluster is important because it shows that the French transition challenge is not purely technical. Retailers need to understand how to operate new infrastructure, how to finance it, how to comply with rules, how to use data and digital tools, and how to position these investments within a sustainable business model.

Key Insight: The most urgent French skills gap is not one isolated topic. It is an interconnected competence cluster combining EV infrastructure, financial planning, regulatory compliance, digital capability and alternative-fuel literacy. Training should therefore be designed as an integrated pathway rather than a set of disconnected modules.

Topics Respondents Would Like to Explore

Comment: Respondents are interested in practical and strategic transition topics.

Curriculum Topic	Mentions	Visualisation
Sustainable supply chain management	**22 (88%)**	
Financial planning & risk mitigation	**19 (76%)**	
Business Strategy adaptation	**17 (68%)**	
Digital & data-driven decision-making	**15 (60%)**	
Customer engagement and marketing	**10 (40%)**	

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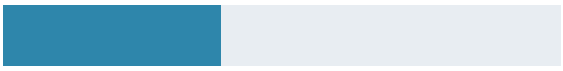
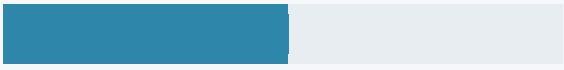
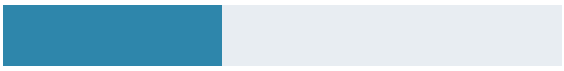
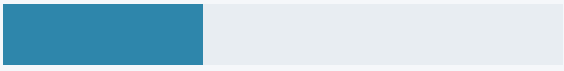
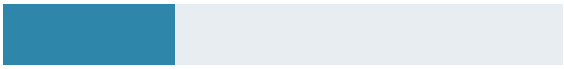
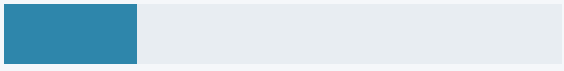
Alternative fuel adoption	**10 (40%)**	
Regulatory compliance and environmental standards	**8 (32%)**	

Key Insight: There is strong interest in practical transition topics, led by **sustainable supply chain management (88%)**, **financial planning (76%)**, and **business strategy adaptation (68%)**. Digital decision-making is also a priority (**60%**), while operational topics like **customer engagement** and **alternative fuels (40%)**, and **regulatory compliance (32%)** are less emphasised but still relevant.

Current Operational Challenges

Comment: Economic pressure and fuel margins remain major operational concerns.

Challenge	Mentions	Visualisation
Fuel margins	**19 (76%)**	
Competition	**14 (56%)**	
Operational costs	**11 (44%)**	
Regulatory uncertainty	**10 (40%)**	
Staff training gaps	**8 (32%)**	
Investment capacity	**7 (28%)**	

The operational challenge landscape is dominated by economic pressure. Fuel margins are cited by 76.0% of respondents, competition by 56.0%, operational costs by 44.0%, and regulatory uncertainty by 40.0%. Barriers to technology adoption reinforce the same picture: installation costs are cited by 60.0%, low customer demand by 56.0%, and space or capacity constraints by 48.0%. The French rural context makes this particularly significant. Installing new infrastructure is not only a question of willingness; it requires capital, sufficient demand, usable space and regulatory clarity.

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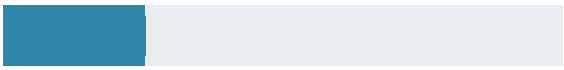
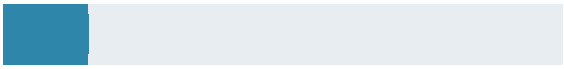
Barriers to Adopting Few Technologies

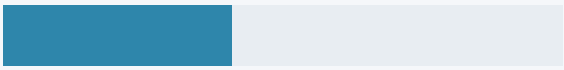
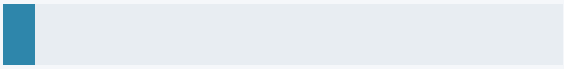
Comment: Cost and customer demand are key barriers to technology adoption.

Barrier	Mentions	Visualisation
Installation costs	**15 (60%)**	
Low customer demand	**14 (56%)**	
Space /capacity constraints	**7 (28%)**	
Technical knowledge gaps	**4 (16%)**	

Key Insight: Cost and demand are the main barriers to adoption, with **60% citing installation costs** and **56% low customer demand**. Structural (**28% space constraints**) and skills-related barriers (**16% knowledge gaps**) are less prominent but still limit deployment.

Ease of Access to Relevant Training

Comment: Access to relevant training opportunities remains insufficient.

Response	Count	Visualisation
Not at all easy	**13 (52%)**	
Slightly easy	**11 (44%)**	
Very easy	**1 (4%)**	

Key Insight: Training access is one of the clearest weaknesses in the French data. 52.0% of respondents say access to relevant training is not easy at all and 44.0% describe it as only slightly easy. Despite this, 24.0% have participated in sustainability-related training in the past two years, a higher level than in some partner contexts but still insufficient considering the scale of change. Training is considered fairly or very important by 80.0% of respondents, confirming that the issue is not a lack of perceived relevance, but the availability, format and practical usefulness of training.

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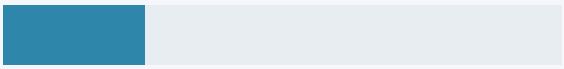
Participation in Sustainability-related Training During the Past Two Years

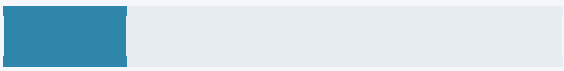
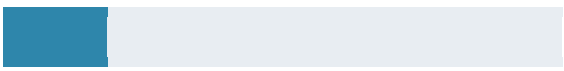
Comment: Participation in sustainability training is still relatively low.

Response	Count	Visualisation
No	**19 (76%)**	
Yes	**6 (24%)**	

Key Insight: 76% have NOT participated in any sustainability training in the past 2 years. This represents a substantial untapped audience for inFUELencer's programme.

Importance of Training for Future Business Viability

Comment: Training is considered important for long-term business viability.

Response	Count	Visualisation
Moderately important	**16 (64%)**	
Slightly important	**5 (20%)**	
Very important	**4 (16%)**	

Key Insight: Training is widely recognised as important, with **64% rating it moderately important** and **16% very important**, while only **20% see it as slightly important**, confirming its role in supporting long-term business viability.

Insights from VET Trainer Interviews in France

VET trainers identify similar gaps from the delivery side. Recurring themes include limited understanding of alternative energy technologies, weak mastery of emerging business models, insufficient knowledge of environmental regulation, lack of strategic vision, and a need for stronger financial engineering. Trainers also point to gaps in current training provision: limited content on hydrogen and EV charging infrastructure, few modules on economic diversification, and insufficient global approaches connecting ecological transition, digital transformation and business viability.

On future skills, trainers converge around alternative energies, transition strategy, diversification management, digital transformation, financial project engineering and customer communication. They also highlight delivery challenges: rapid changes in standards, complexity of technologies, heterogeneity of learners, time constraints for professionals and lack of specialist trainers. These observations strongly support a modular, practical and regularly updated curriculum.

Key Insight: The VET evidence confirms the survey results: French training must move beyond awareness-raising. It should help operators make investment decisions, understand technology options, adapt their business model and communicate new services to customers.

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3.2.2 Germany

This section provides a consolidated analysis of responses to Questions 6 to 21, covering Green Deal awareness, regulatory exposure, business model change expectations, capability self-assessment, knowledge gaps, and training engagement.

Familiarity with the European Green Deal & Decarbonisation Policies

Response	Count	Visualisation
Moderately aware	**12 (48%)**	
Very aware	**6 (24%)**	
Slightly aware	**4 (16%)**	
Not at all aware	**3 (12%)**	

Key Insight: 72% have at least moderate awareness of the EGD – but 28% are only slightly or not at all aware. This gap must be addressed in inFUELencer curriculum's foundational module on regulatory context.

Anticipated Impact of Environmental Regulations on Business

Response	Count	Visualisation
Significantly	**18 (72%)**	
Moderately	**4 (16%)**	
Slightly	**3 (12%)**	

Key Insight: 72% expect significant regulatory impact on their business. This is one of the strongest signals in the entire dataset – regulatory navigation must be a curriculum core, not an elective.

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Expectation of Significant Business Model Changes Within 5 - 10 Years

Response	Count	Visualisation
Yes	**14 (56%)**	
Not sure	**7 (28%)**	
No	**4 (16%)**	

Key Insight: 56% expect their business model will require significant change. A further 28% are unsure – representing an audience that needs scenario-based learning to understand what transformation might look like for them.

Key Trends Expected to Impact the Business (Multi-select)

Expected Trend	Mentions	Visualisation
Decline in fossil fuel demand	**19 (76%)**	
New taxation	**12 (48%)**	
Bio-/alternative fuels	**11 (44%)**	
Electrification	**11 (44%)**	
Digitalisation / smart stations	**8 (32%)**	
New competitors / substitutes	**8 (32%)**	
Skills shortage	**8 (32%)**	

What other Trends Are Expected? (Open-ended Question)

Additional trends cited (open text, Q10): increased digitalisation, growth of CNG/LNG vehicles, return to combustion engines with alternative fuels, unmanned shop concepts, energy buffering, fuel retail shop diversification.

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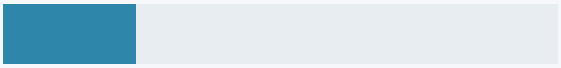
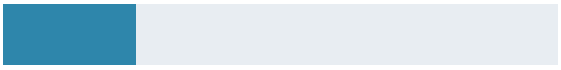
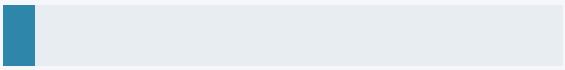
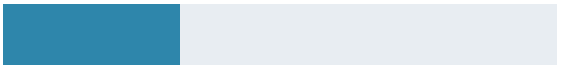
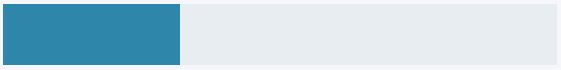
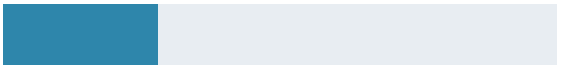
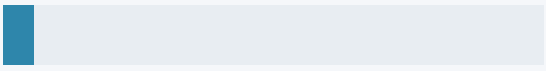
Perceived Capability for Sustainable Transition

Response	Count	Visualisation
Significantly capable	**11 (44%)**	
Moderately capable	**6 (24%)**	
Partially capable	**6 (24%)**	
Not at all capable	**2 (8%)**	

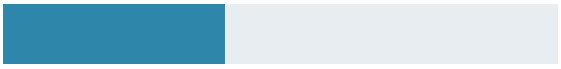
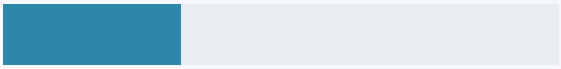
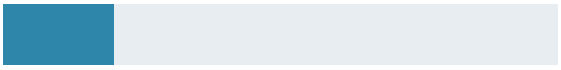
Key Insight: 44% feel significantly capable – but 56% acknowledge partial, moderate, or no capability for sustainable transition. This majority gap underscores the need for targeted upskilling.

Confidence in Knowledge of Alternative Fuels & EV Technologies

Response	Count	Visualisation
Very confident	**8 (32%)**	
Moderately confident	**8 (32%)**	
Somewhat confident	**7 (28%)**	
Not at all confident	**2 (8%)**	

Key Insight: Only 32% are very confident in their knowledge of alternative fuels and EV technology. 36% are only somewhat or not at all confident – revealing a clear technical knowledge gap that inFUELencer must address directly.

Interest in Exploring New Business Models & Diversification Strategies

Response	Count	Visualisation
Moderately interested	**10 (40%)**	
Very interested	**8 (32%)**	
Slightly interested	**5 (20%)**	

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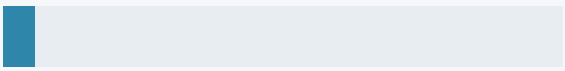
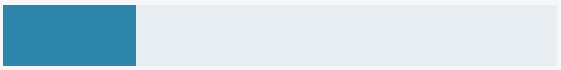
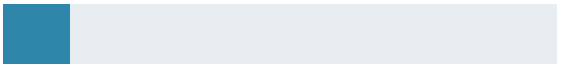
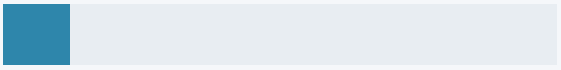
Not at all interested	**2 (8%)**	

Key Insight: 72% are moderately or very interested in new business models. This is a strong foundation for curriculum engagement – content on strategic adaptation will find a receptive audience.

Preparedness for Sustainability-driven Changes

Response	Count	Visualisation
Moderately prepared	**13 (52%)**	
Slightly prepared	**6 (24%)**	
Very prepared	**3 (12%)**	
Not at all prepared	**3 (12%)**	

Key Insight: Only 12% feel very prepared for sustainability-driven business changes. 36% feel only slightly or not at all prepared. The curriculum must bridge this preparedness gap with practical, scenario-based content.

Critical Knowledge Gaps (Self-reported, Open Text)

Respondents identified the following knowledge areas as most lacking (translated from German, grouped by theme):

Gap Area	Detail
EV Infrastructure Management	Most frequently cited; 9 respondents named EV charging infrastructure management as their primary gap, including operational, technical, and ROI-related aspects.
Regulatory Compliance	Cited by 14 respondents across responses. A dominant theme: uncertainty about which regulations apply, how to comply, and when frameworks will stabilise.
Technical Knowledge - Alternative Fuels	7 respondents explicitly cited gaps in technical knowledge on biofuels, HVO, hydrogen, and e-fuels.
Financial Planning for Transformation	8 respondents highlighted lack of financial planning skills specific to green transition investments, including poor ROI clarity on EV/hydrogen.
Digital Skills	5 respondents cited digital competencies as a gap, including automation, data systems, and digital operations.
Policy & Technology Direction Uncertainty	Several respondents noted the challenge is not just knowledge but the absence of stable policy direction: 'Which technology will prevail?' and 'No stable framework conditions.'

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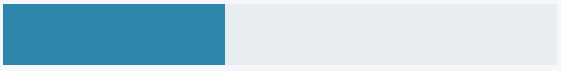
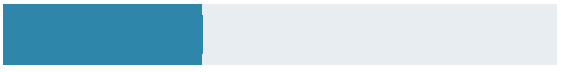
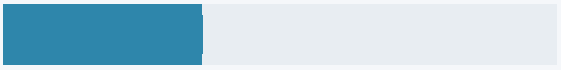
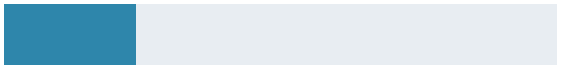
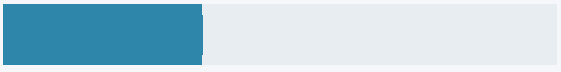
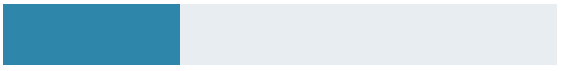
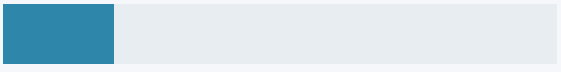
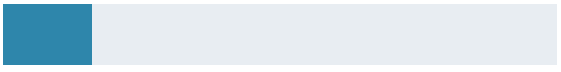
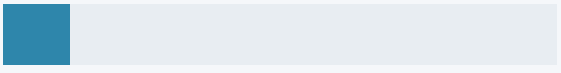
Topics of Interest for inFUELencer Curriculum (Multi-select)

Curriculum Topic	Mentions	Visualisation
Strategic business adaptation	**14 (56%)**	
Alternative fuel introduction	**12 (48%)**	
Customer engagement & marketing	**12 (48%)**	
Regulatory compliance & environmental standards	**10 (40%)**	
Financial planning & risk mitigation	**9 (36%)**	
Digital & data-driven decision-making	**9 (36%)**	
Sustainable supply chain management	**6 (24%)**	

Greatest Current Business Challenges (Multi-Select)

Challenge	Mentions	Visualisation
Operating costs	**15 (60%)**	
Regulatory uncertainty	**9 (36%)**	
Investment capacity	**8 (32%)**	
Competition	**5 (20%)**	
Staff training gaps	**4 (16%)**	
Fuel margins	**3 (12%)**	

Key Insight: Operating costs (60%) and regulatory uncertainty (36%) dominate. A notable minority (16%) explicitly cited staff training gaps as a live business challenge – directly validating the need for inFUELencer.

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Barriers to Adopting New Technologies (Multi-select)

Barrier	Mentions	Visualisation
Regulations /policy framework	8 (32%)	
Low customer demand	6 (24%)	
Installation costs	5 (20%)	
Space /capacity constraints	2 (8%)	
Technical knowledge gaps	1 (4%)	

Open-text barriers also included: lack of state support for HVO rollout, unclear permitting from municipalities, no market-driven mechanisms, and planning uncertainty around demand.

Ease of Accessing Relevant Sector Training

Response	Count	Visualisation
Moderately easy	16 (64%)	
Slightly easy	6 (24%)	
Not at all easy	2 (8%)	
Very easy	1 (4%)	

Key Insight: Only 4% find training very easy to access. 32% report access is difficult or not at all easy - confirming a market gap that inFUELencer is positioned to fill.

Participation in Sustainability Training (last 2 years)

Response	Count	Visualisation
No	14 (56%)	
Yes	11 (44%)	

Of the 11 who participated, training types included: EV mobility workshops, CSRD/ESRS compliance training, hydrogen fuel briefings, strategic business development, digital systems, and internal regulatory update sessions.

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Key Insight: 56% have NOT participated in any sustainability training in the past 2 years. This represents a substantial untapped audience for inFUELencer's programme.

What Kind of Training Was It?

- E-mobility
- Alternative fuels
- Uniti Thema Hydrogen
- Sustainability management
- CSRD/ESRS
- DNK
- VSME
- Internal Training on legislative changes and group goals
- Not direct training but rather expert preparations at industry events
- Eco Training for Drivers
- Strategic Corporate Development
- Digital Systems

Importance of Training for Future Business Viability

Response	Count	Visualisation
Slightly important	**10 (40%)**	
Moderately important	**8 (32%)**	
Very important	**6 (24%)**	
Not at all important	**1 (4%)**	

Key Insight: 96% consider training at least slightly important for their business viability. 56% rate it moderately or very important. Demand exists; the inFUELencer programme needs to match content relevance to this perceived need.

Insights from VET Trainer Interviews in France

Ten expert interviews were conducted to identify critical knowledge gaps within the fuel retail sector. Providing their perspectives on the industry's educational needs provides essential qualitative context for the types of competencies required to support the sector's transition toward new mobility solutions.

Based on the experts' insights, the sector faces a complex, integrated challenge that extends far beyond basic technical knowledge:

- **Regulatory and Carbon Literacy:** Interviewees repeatedly highlighted GHG quotas, carbon footprint accounting, ESG requirements, and EU regulations as essential but heavily underdeveloped areas. Operators must understand compliance, carbon credits, and funding opportunities to survive the transition.

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- **Business Strategy and Infrastructure:** Transformation projects require a clear economic case. Experts noted significant gaps regarding mobility hub development, convenience strategy, and infrastructure planning – particularly the challenges of navigating grid capacity and net congestion for EV charging.
- **Navigating Regulatory Uncertainty:** Unclear political pathways, shifting rules, and uncertain returns act as major barriers to innovation. Operators often do not reject transformation but struggle to translate broad awareness into concrete, economically viable decisions due to limited planning security and past political volatility.

On the specific topics of front-line operations and training delivery, the experts demonstrated strong alignment on the skills needed for station-level staff to manage the green transition:

- **Practical Fuel and Powertrain Literacy:** Station staff require accessible, foundational knowledge of a multi-energy mix. Staff do not need to be engineers, but they must be able to confidently explain products, dispel customer myths, and answer basic questions.
- **Soft Skills and Service Transformation:** As stations evolve into retail-oriented mobility hubs, there is a growing need for enhanced soft skills. Customer communication, conflict handling, situational awareness, and general retail service orientation are becoming critical future competencies.
- **Targeted and Practical Training Delivery:** Training must be directly linked to daily operations and tailored to specific roles. While owners and managers benefit from webinars, sector platforms, and expert briefings, time-pressured station staff require short, mobile-first videos, modular units, and highly practical scenarios that reflect their daily realities on site.

The expert interviews confirm that the most critical skills gaps are not limited to technical knowledge of alternative fuels or EV infrastructure. Interviewees repeatedly framed the transformation as an integrated challenge combining regulation, business strategy, carbon management, infrastructure, customer communication and service orientation. In particular, knowledge of GHG quotas, carbon footprint accounting, ESG requirements, alternative fuels and the economic implications of transformation emerged as essential but underdeveloped competence areas.

The additional interviews broaden this picture in three important ways. First, they show that charging infrastructure is not only a technical or investment topic, but also an infrastructure planning issue, especially where net congestion limits expansion. Second, they highlight a need for practical fuel literacy, including E10, E20, bioethanol, HVO, e fuels, hydrogen and conventional fuels. Staff do not need to become engineers or scientists, but they need enough knowledge to explain products, answer basic customer questions and understand the changing offer of their site. Third, they show that the future station requires stronger service and soft skills, including customer communication, conflict handling, situational judgement, marketing awareness and the ability to operate in a more retail oriented environment.

Experts stressed that investment decisions in the German fuel retail sector are strongly shaped by unclear regulatory pathways, uncertain returns, infrastructure constraints and limited planning security. This helps explain why regulatory uncertainty and investment capacity appear prominently in the survey data. The interviews suggest that many operators do not reject transformation, but struggle to translate broad awareness into concrete, economically viable decisions. Political volatility, shifting rules and unclear technology pathways also contribute to mistrust, especially where operators have previously invested in solutions that later lost policy support.

Interviewees emphasised that training must be practical, targeted and closely linked to daily operations. Traditional information-based formats were seen as insufficient where learners first need to overcome scepticism or uncertainty. The new interviews further indicate that different target groups require different formats. Owners, managers and office-based staff may benefit from webinars, newsletters, sector platforms and expert briefings. Station staff, many of whom work part time or under time pressure, may need short mobile first videos, simple explanations, practical scenarios and

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materials that appreciate the reality of work on site. Practical demonstrations, short modular units, newsletters, expert sessions, blended formats and mobile learning should therefore be combined depending on role and learning context.

3.2.3 Greece

This section presents findings from the fuel retailer survey and draws on qualitative insights from ten VET trainer interviews conducted in Greece, mapping the current knowledge and skills landscape, identifying the principal barriers to transformation, and surfacing the structural conditions shaping training readiness in the Greek fuel retail sector.

Green Transition Awareness & Perceived Regulatory Impact

Greek fuel retailers occupy a paradoxical position: they sense that change is coming and increasingly feel its regulatory weight, yet most remain only moderately informed about the policy framework driving it. Asked about their familiarity with the European Green Deal, 53.8% describe themselves as only moderately aware, while a further 34.6% report being slightly or not at all aware. Only 11.5% feel extremely aware. This represents a significant awareness gap, particularly concerning given that the EGD's decarbonisation timeline will directly reshape the sector's operating conditions within the next decade.

Responses	Count	Share
Moderately aware	**14 (53.8%)**	
Not at all aware	**7 (26.9%)**	
Extremely aware	**3 (11.5%)**	
Slightly aware	**2 (7.7%)**	

Responses	Count	Share
Significantly	**15 (57.7%)**	
Moderately	**6 (23.1%)**	
Slightly	**3 (11.5%)**	

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Not at all	2 (7.7%)	

Key Insight: Despite limited familiarity with the EGD, 57.7% of Greek retailers believe environmental regulations will affect their business significantly over the next 5–10 years, suggesting that regulatory pressure is felt at an operational level even without a clear understanding of the overarching policy architecture.

The contrast between low policy literacy and high perceived regulatory impact is one of the defining features of the Greek data. When asked how strongly environmental regulations would affect their business over the next 5–10 years, 57.7% responded 'significantly' and a further 23.1% said 'moderately', leaving only 19.2% who felt the impact would be limited or negligible. This anxiety is real and widely shared, but it is not yet matched by the knowledge needed to navigate the transition constructively.

On the question of business model change, responses were notably split. 50% said their model would definitely need significant changes within the next 5–10 years, while 42.3% hedged with 'maybe' and just 7.7% said no. This ambivalence is itself revealing, suggesting a sector caught between awareness of the need to adapt and uncertainty about how or when to act.

Response	Count	Share
Yes	13 (50%)	
Maybe	11 (42.3%)	
No	2 (7.7%)	

Anticipated Trends and Future Pressures, Self-assessed Skills Confidence & Preparedness

When asked which trends they expected to have the greatest impact on their business, Greek retailers produced a striking prioritisation: new taxation came first, mentioned by 80.8% of respondents. This is a distinctly Greek result and sets the national context apart from most other consortium countries. This reflects the chronic burden of fuel sector taxation in Greece, where margins are already compressed and any new fiscal obligation is experienced as an existential threat rather than an incremental cost.

Responses	Mentions	Share
New taxation	21	80.8%
Biofuels / alternative fuels	17	65.4%
Electrification	14	53.8%
Digitalisation (automation, apps, smart stations)	8	30.8%
Declining demand for fossil fuels	4	15.4%
Competition / new market entrants	3	11.5%

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Key Insight: Taxation outranks electrification as the primary perceived threat, which seems as a uniquely Greek finding that reflects acute margin compression rather than indifference to the energy transition. Training programmes must acknowledge this economic reality to remain credible to their audience.

Beyond taxation, 65.4% cited biofuels and alternative fuels as a key trend, and 53.8% identified electrification. Digitalisation was noted by 30.8%. Several respondents offered qualitative elaborations in the open-text field, with hydrogen emerging as a longer-term expectation for at least three respondents. One respondent articulated a broader structural concern with notable directness:

> "Most fuel stations will close in the near future. The situation in the sector is very difficult."
> **— Greek fuel retailer**

A central aim of this section of the survey was to probe beyond general awareness and assess how confident Greek retailers actually feel about their ability to support the transition across technical, digital, commercial and organisational dimensions. The results paint a picture of a sector that has the will to adapt but lacks the concrete knowledge and confidence to act.

On the question of whether they possess the skills needed to support a sustainable fuel retail model (Q11), responses were more positive than might be expected: 26.9% said 'very much so', 42.3% said 'quite a lot', and only 30.8% said 'very little'. However, this self-assessment shifts considerably when the question becomes more specific.

Responses	Count	Share
Quite a lot	**11 (42.3%)**	
Very little	**8 (30.8%)**	
A lot	**7 (26.9%)**	

When asked specifically about their knowledge of emerging alternative fuels, EV technologies and associated business models (Q12), confidence dropped sharply. 30.8% felt 'slightly confident', 30.8% only 'moderately confident', and 11.5% 'not at all', leaving barely a quarter of respondents (26.9%) feeling very confident in this domain. Given that these are precisely the areas in which the sector must develop competence to survive, this gap is one of the most operationally significant findings from the Greek survey.

Responses	Count	Share
Moderately confident	**8 (30.8%)**	
Slightly confident	**8 (30.8%)**	
Very confident	**7 (26.9%)**	
Not at all	**3 (11.5%)**	

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Key Insight: Two-thirds of Greek retailers report low or only moderately confidence in their knowledge of alternative fuels and EV technologies, which are the very competencies most critical for navigating the transition. This is not a peripheral gap; it sits at the heart of the sector's transformation challenge.

Interest in exploring new, innovative business models aligned with the European Green Deal (Q13) was cautious rather than enthusiastic: 61.5% expressed only moderate interest, 23.1% very little or none at all, and nobody selected high interest. This reticence is consistent with the financial fragility of the Greek micro-enterprise model, operators under pressure from operating costs and thin margins are unlikely to invest attention in strategic innovation unless the business case is made compellingly. Overall preparedness to adapt to sustainability-driven changes (Q14), framed to encompass regulatory, energy, commercial and organisational dimensions, was rated as only moderate by 80.8% of respondents, with a further 19.2% feeling barely or not at all prepared. Not a single respondent felt well or very well prepared. This is the starkest single finding on the Greek skills landscape: near-universal acknowledgement of unpreparedness in the face of a well-documented and accelerating transformation.

Responses	Count	Share
Moderately prepared	21 (80.8%)	
Slightly prepared	3 (11.5%)	
Not prepared at all	2 (7.7%)	

Self-identified Knowledge Gaps

Asked directly what knowledge they felt they most lacked (Q15a), respondents produced a clear hierarchy of gaps. Technical knowledge of alternative fuels was the most frequently cited, appearing in 14 responses (53.8%). Regulatory compliance followed in 11 responses (42.3%), reflecting the anxiety already visible in the trend data. EV infrastructure management was identified in 9 responses (34.6%), and digital skills in 8 (30.8%). Financial planning for transformation, a critical enabler for investment decisions, was mentioned in 6 responses (23.1%).

Responses	Mentions	Share
Technical knowledge of alternative fuels	14	53.8%
Regulatory compliance	11	42.3%
EV infrastructure management	9	34.6%
Digital skills	8	30.8%
Financial planning for transformation	6	23.1%

Key Insight: The top five knowledge gaps form a coherent cluster: they span the technical, regulatory, operational, digital and financial dimensions of the same transformation challenge. No single gap can be addressed in isolation. Effective training must treat these as interconnected competencies.

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When asked which broader topics they would be interested in exploring (Q15b), four themes tied at 12 mentions each (46.2% of respondents): business strategy adaptation, customer engagement and marketing in the new fuel landscape, financial planning and risk mitigation, and regulatory compliance. Alternative fuel adoption received 6 mentions and data-driven digital decision-making received 4. The alignment between stated gaps and declared interests is striking and provides a firm foundation for curriculum prioritisation.

> "VET training must stop presenting sustainability as an ethical or regulatory obligation. For small operators, it only becomes relevant when they can see how it translates into operational benefit and market positioning."
> **— VET Trainer, Greece**

Current Operational Challenges and Barriers to Technology Adoption

The challenge landscape facing Greek fuel retailers is overwhelmingly dominated by cost. Installation costs were cited by 88.5% of all respondents (23 out of 26), making this the single most pervasive concern in the entire dataset. Competition was a distant second at 50%, followed by staff training gaps at 30.8% and regulatory uncertainty at 26.9%. The open-text elaborations give texture to these numbers: one respondent explicitly named 'high taxation / digitalisation' as a combined burden, and another wrote that 'people have no money to consume and travel', pointing to the demand-side compression that compounds the sector's structural difficulties.

Responses	Mentions	Share
Operational costs	**23**	**88.5%**
Competition	**17**	**50.0%**
Staff training gaps	**8**	**30.8%**
Uncertainty in regulations	**7**	**26.9%**
Fuel margins	**1**	**3.8%**
Lack of incentives	**1**	**3.8%**

Key Insight: The 88.5% figure for operating costs is not simply a data point; it is a lens through which every other finding must be interpreted. Any training or transformation initiative that does not credibly address cost implications will struggle to achieve uptake in the Greek context.

On the barriers to adopting new technologies specifically (Q17), installation costs led at 57.7%, followed by regulatory barriers at 42.3%, lack of technical knowledge at 38.5%, low customer demand at 26.9%, and space/capacity constraints at 23.1%. The prevalence of regulatory barriers is noteworthy: rather than being seen as a driver of change, regulation is experienced primarily as an obstacle, which is a friction point that adds cost and complexity without yet providing the clarity or support needed to act.

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Responses	Mentions	Share
Installation costs	15	57.7%
Regulatory barriers	11	42.3%
Lack of technical knowledge	10	38.5%
Low customer demand	7	26.9%
Space / capacity constraints	6	23.1%

> "When a station changes its services, operating model or customer communication, it almost always incorporates new digital tools. The green and digital transitions cannot be separated."
> **— VET Trainer, Greece**

Training Access, Participation and Perceived Importance

One of the most significant, and in some ways most alarming, findings from the Greek survey concerns the current state of training engagement (Q19). Despite widespread acknowledgement of the need to adapt, 88.5% of respondents (23 out of 26) had not participated in any sustainability-related training in the previous two years. Of the 3 who had, 2 offered only the most basic descriptions of what they had received: seminars on EV charging and management of new trends, and training on technical matters and payments/accounting. No respondent described receiving training that directly addressed the green transition, business model adaptation or the regulatory changes ahead.

Responses	Count	Share
No	23 (88.5%)	
Yes	3 (11.5%)	

Key Insight: An 88.5% non-participation rate in sustainability training, at a moment when the sector faces its most significant transformation in decades, represents a structural training vacuum. So, the inFUELencer project enters a market where the field is essentially open, but where first interventions must earn trust quickly.

Access to relevant training (Q18) was perceived as only moderately easy by 57.7% and slightly easy by 19.2%, with just 23.1% finding it very easy. This is consistent with the single-station, micro-enterprise profile of the Greek sample: operators without dedicated HR functions, operating long hours and often alone, face real practical barriers to accessing training even when they are motivated to do so.

Responses	Count	Share
Moderately	15 (57.7%)	
Very	6 (23.1%)	

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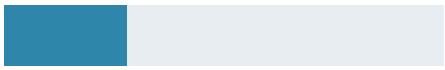
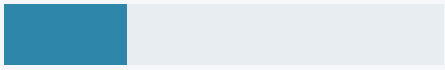
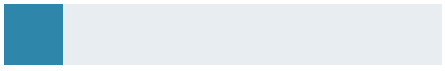
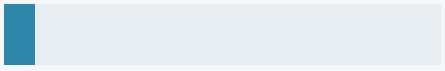
Slightly	**5 (19.2%)**	

Despite low participation, the perceived importance of training for future business viability (Q21) was notably high. 61.5% rated training as 'very important', with a further 26.9% calling it moderately important'. Only one respondent considered training not at all important. This gap between the recognised value of training and the near-total absence of recent participation is perhaps the defining tension of the Greek findings, and the most compelling argument for the project's intervention.

Responses	Count	Share
Very important	**16 (61.5%)**	
Moderately important	**7 (26.9%)**	
Slightly important	**2 (7.7%)**	
Not at all important	**1 (3.8%)**	

Insights from VET Trainer Interviews in Greece

Training Gaps Identified

Across all ten interviews, trainers converged on five substantive training gaps, each of which maps directly onto the knowledge deficits reported by retailers themselves:

- Theory–practice disconnect: Training content, even when correctly structured, does not translate into on-the-job behaviour. Retailers complete programmes without developing a clear picture of how to apply new knowledge in their next shift or their next customer interaction. One trainer described this as knowledge that 'stays at the level of information, without becoming professional practice'.
- Missing business case for sustainability: Sustainability is presented as a regulatory or ethical obligation rather than a commercial opportunity. For small operators already under financial pressure, this framing is demotivating. Training must articulate how green practices translate into operational savings, new revenue streams or improved market positioning.
- Andragogical failure: Projects are not designed for working adults. Experienced professionals do not respond well to generic presentations and need participatory approaches that acknowledge their prior knowledge, address their actual daily difficulties and allow them to connect new content to lived experience.
- Outdated and decontextualised technical content: Technical training materials lack the operational specificity, like common errors, critical checkpoints, real-world scenarios, that makes them credible and usable. When content does not reflect the realities of the job, practitioners disengage.
- Digital tools and customer experience undertreated: Topics related to customer-facing digital operations are routinely treated as peripheral additions rather than core operational content, despite their direct influence on daily business performance.

> "The gap is not only thematic; it is also narrative. We do not always explain convincingly why this learning matters. And without that, small businesses struggle to see why they should invest time and effort."
> **— VET Trainer, Greece**

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Barriers to Delivering New Content

Trainers also identified a distinct set of barriers on the delivery side, which compound the gaps described above. Three were recurring across most interviews:

- Psychological distance from the 'green transition' as a concept: Many participants perceive the topic as abstract, political or remote from their everyday work. Trainers must first bridge this gap before substantive learning can take place, repositioning the transition as a direct operational reality rather than an external mandate.
- Time pressure and content density: Programme structures push trainers to cover too much in too little time, producing superficial learning. As one trainer noted, participants hear a great deal of information but do not have the space to process, connect or discuss it.
- Group heterogeneity and digital inequality: Classes frequently mix participants with very different experience levels, technical knowledge and digital confidence. Without differentiated design, some participants are lost while others are bored, and those anxious about digital tools risk disengaging at the first opportunity.

> "When the programme relies even partially on digital elements, some participants feel at ease and others do not. If this is not anticipated in the design, it can generate reluctance or refusal. The trainer needs not just good content but a supportive structure so that no one feels left behind."
> **— VET Trainer, Greece**

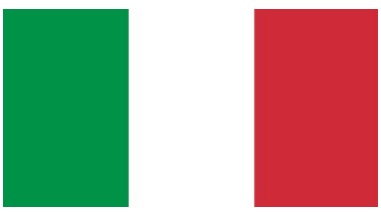
Recommended Pedagogical Approaches

On the question of effective learning methods, all ten VET trainers converged on blended learning as the preferred and most effective format. Beyond this consensus, their recommendations formed a coherent and complementary set of principles:

- Short, modular units with clear objectives: adults in active employment need to know what they will learn and how it will serve them before they engage.
- Realistic case studies and practical scenarios: not generic best-practice examples, but situations that reflect the everyday realities of Greek single-station operators.
- Role-play and simulated customer dialogues: particularly for developing communication skills, which are difficult to build through theoretical instruction alone.
- Checklists, process visuals and step-by-step guides: essential for technical content, as they allow practitioners to apply knowledge immediately without relying on memory.
- Brief digital components as support tools: short videos, quizzes and self-assessment exercises that complement rather than replace in-person or synchronous elements.

> "A good curriculum for this sector must be modular, flexible, and contextually grounded. But above all, it must help participants understand not just what is changing, but why that change matters for their role and for the future of the sector."
> **— VET Trainer, Greece**

3.2.4 Italy



In terms of key qualitative findings, the dataset analysed reveals a sector aware of transformation pressures but still constrained by structural and operational limitations: if we consider the awareness

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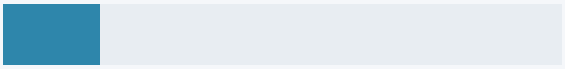
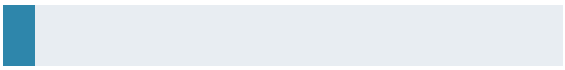
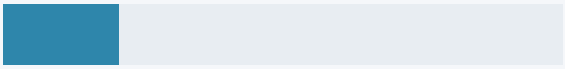
and policy perception, only the 24% of respondents consider themselves moderately informed about the European Green Deal and decarbonisation policies, while the majority of the sample, 52%, reported low familiarity, and 20% “completely uninformed”. Only one fuel retailer reported to be “very informed”.

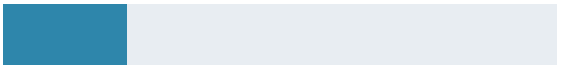
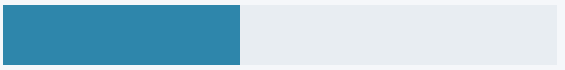
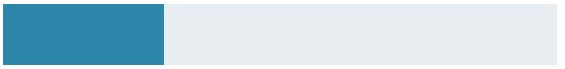
Familiarity with the European Green Deal and Decarbonisation Policies

Response	Count	Visualisation
Slightly aware	13 (52%)	
Not at all aware	5 (20%)	
Extremely aware	1 (4%)	
Fairly aware	6 (24%)	

Interesting to consider a quote by a fuel retailer engaged: “I’d set the Green Deal on fire”. It is a mockery of politics, the world works differently and it’s of no use to small businesses in the sector. Training is useless to us; we’ve always had to fend for ourselves, because nobody cares about the small companies. Big players stay afloat because they sell everything, certainly not fuel - see highway gas stations! What’s most useful to us is digitalisation, because people use it, not because it changes anything for us”.

At the same time, expectations of impact are clear: 44% believe environmental regulations will affect their business moderately; 32% slightly; and the 24% strongly.

Perceived Impact of Environmental Regulations

Response	Count	Visualisation
Significantly	6 (24%)	
Moderately	11 (44%)	
Slightly	8 (32%)	

Even where knowledge is partial, there is a broad recognition that regulation will shape future operations (and sustainability). Considering now the most significant challenges reported, beneficiaries engaged considered the following main “pressures”, indicating that economic sustainability is already under pressure, independently of the green transition:

- Reduction of fuel margins
- Increase in operating costs
- Regulatory uncertainty
- Limited investment capacity
- Staff shortages / insufficient training

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Considering the barriers to technological adoption, financial and regulatory barriers outweigh purely technical ones. The main obstacles reported are the following:

- High investment costs
- Regulatory complexity
- Lack of knowledge/skills
- Limited customer demand
- Infrastructure constraints (space/capacity)

Talking now about skills and competencies, there is an evident gap between general confidence and specific preparedness. The 64% believe they partially have the skills for transition. However, on specific knowledge of alternative fuels and EV business models, the 60% feel moderately prepared, with the 28% not very prepared, and the 8% not prepared at all.

Self-assessed Skills to Support Sustainable Fuel Retail

Responses	Count	Share
Moderately confident	8 (32%)	
Slightly confident	16 (64%)	
Very confident	1 (4%)	

Then, on adapting to sustainability-driven changes, the 60% feel only somewhat prepared, while the 36% feel not well prepared and the 4% (1 respondent) not prepared at all.

Preparedness to Adapt to Sustainability-driven Changes

Responses	Count	Share
Moderately prepared	15 (60%)	
Slightly prepared	9 (36%)	
Not prepared at all	1 (4%)	

Thus, there's a capability gap in practical knowledge, not necessarily in general awareness. That's also reinforced by the training access and demand analysis, which is probably one of the strongest findings, with the 80% saying that access to relevant training is difficult or insufficient. Only 20% find it somehow accessible.

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Ease of Accessing Relevant Sector

Responses	Count	Share
Slightly easy	5 (20%)	
Not easy at all	20 (80%)	

And at the same time, the vast majority of the respondents (88%) consider training very important, and only 20% participated in training in the last 2 years (mainly on new norms related to authorisations; general training on safety; alternative energy sources), reporting the access to training as “by no means easy” (86.4%) clearly indicating a mismatch between training demand and supply.

Importance of Training for Future Business Viability

Response	Count	Visualisation
Quite important	(22) 88%	
Very important	(2) 8%	
Not at all important	(1) 4%	

Participation in Sustainability Training in the Last 2 Years

Response	Count	Visualisation
No	(20) 80%	
Yes	(5) 20%	

3.2.5 Poland

This section presents findings from the fuel retailer survey and draws on qualitative insights from ten VET trainer interviews conducted in Poland, mapping the current knowledge and skills landscape, identifying the principal barriers to transformation and surfacing the structural conditions shaping training readiness in the Polish fuel retail sector.

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Green Transition Awareness & Perceived Regulatory Impact

Polish fuel retailers occupy a paradoxical position: they sense that change is coming and increasingly feel its regulatory weight, yet most remain poorly informed about the policy framework driving it.

Response	Count	Visualisation
Moderately aware	**7 (28%)**	
Slightly aware	**14 (56%)**	
Not at all aware	**4 (16%)**	

Asked about their familiarity with the European Green Deal, 56% describe themselves as only slightly aware, while a further 16% report being not at all aware. Only 28% feel moderately aware and zero respondents (0%) feel extremely aware. This represents a severe awareness gap, particularly concerning given that the EGD's decarbonisation timeline will directly reshape the sector's operating conditions within the next decade.

Response	Count	Visualisation
Significantly	**15 (60%)**	
Moderately	**6 (24%)**	
Slightly	**2 (8%)**	
Not at all	**2 (8%)**	

Key Insight: An overwhelming 84% of Polish respondents anticipate that environmental regulations will affect their business moderately (24%) or significantly (60%) over the coming years. This highlights a pervasive anxiety within the sector; despite having low familiarity with the overarching policy frameworks (like the European Green Deal), operators acutely feel the looming operational and financial pressures that these regulations will bring to their enterprises.

When asked to identify the main challenges their businesses currently face, Polish respondents painted a stark picture of a sector. Financial pressures dominate the landscape completely. Fuel margins were cited by 60% of respondents, making it the single most pervasive concern. This was closely followed by operational costs at 56%. For a market characterised by micro-enterprises and small independent operators, these figures confirm that day-to-day profitability is under severe threat, leaving very little breathing room for long-term strategic planning or capital expenditure.

However, looking just below these immediate financial pressures reveals the true complexity of the Polish transition. Uncertainty in regulations and staff training gaps tied as the third most significant challenges, each cited by 48% of respondents. Competition followed at 28%, with investment capacity explicitly cited by only 16%.

On the barriers to adopting new technologies specifically, lack of technical knowledge led overwhelmingly, cited by 80% of respondents. This was followed by installation costs at 64%,

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regulatory barriers at 44%, space/capacity constraints at 32%, and low customer demand at a mere 4%.

Main obstacles to adopting new techn.	Count	Visualisation
Regulations	11 (44%)	
Space/capacity	8 (32%)	
Technical knowledge	20 (80%)	
Low customer demand	1 (4%)	
Installation costs	16 (64%)	

Key Insight: The prevalence of the technical knowledge barrier is the defining feature of this specific dataset. Polish operators experience their own lack of expertise as the absolute primary obstacle. This confirms a critical reality: even if capital and subsidies were made widely available tomorrow, the sector would still struggle to modernise without a massive, simultaneous investment in workforce education and technical training.

On the question of business model change, responses were highly definitive. 72% said their model would definitely need significant changes within the next 5–10 years, while just 4% hedged with 'not sure' and 24% said no. This lack of ambivalence is itself revealing, suggesting a sector that is acutely aware of the impending transformation and the undeniable need to adapt, starkly contrasting with the uncertainty seen in other regions.

Response	Count	Visualisation
Yes	18 (72%)	
Not sure	6 (24%)	
No	1 (4%)	

Anticipated Trends and Future Pressures, Self-assessed Skills Confidence & Preparedness

When asked which trends they expected to have the greatest impact on their business, Polish retailers prioritised specialised skills shortage, mentioned by 52% of respondents. Digitalisation and bio/alternative fuels followed closely, each cited by 48% of respondents. Notably, new taxation was the least cited trend, selected by only 20%.

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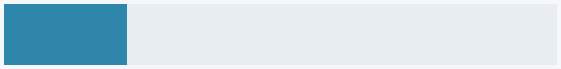
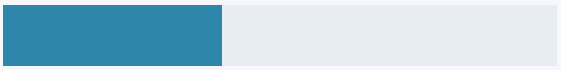
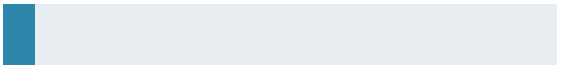
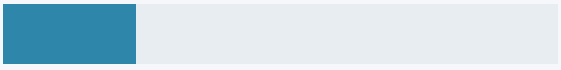
Expected Trend	Mentions	Visualisation
Decline in fossil fuel demand	10 (40%)	
New taxation	5 (20%)	
Bio-/alternative fuels	12 (48%)	
Electrification	9 (36%)	
Digitalisation / smart stations	12 (48%)	
New competitors / substitutes	11 (44%)	
Skills shortage	13 (52%)	

Key Insight: The fact that a "specialised skills shortage" outranks the decline in fossil fuel demand, electrification and taxation proves that Polish operators view the transition primarily as a human capital crisis. They are less paralysed by the threat of new fiscal obligations and more acutely concerned that they simply lack the trained workforce and digital readiness required to modernise their business models.

Looking ahead to the next decade, Polish fuel retailers anticipate a fundamental shift away from traditional fossil fuel sales toward a diversified, multi-service hub model. To survive the expected decline in traditional fuel demand, operators emphasise the urgent need to pivot toward bio/alternative fuels, EV charging infrastructure and broader mobility services. Driven by higher customer expectations, they are also actively expanding non-fuel offerings, highlighting the necessity for enhanced gastronomy, expanded shops, package collection points and dedicated relaxing spaces. Underpinning this entire transformation is a wave of deep digitalisation and operational automation. Polish operators increasingly view smart stations, automated services and mobile applications as operational baselines required to handle growing competition and market consolidation.

On the question of whether they are equipped with the necessary skills to support the transition to sustainable fuel retailing and services, Polish responses were notably cautious. Only a tiny fraction, 4%, felt 'significantly' equipped, while 32% felt 'moderately' so. The absolute majority, 52%, felt only 'partially' equipped, and a further 12% felt 'not at all' equipped. This self-assessment clearly reflects a widespread acknowledgement of an operational skills deficit across the sector, underscoring their earlier identification of a specialised skills shortage as a primary business threat.

Response	Count	Visualisation
Significantly capable	1 (4%)	
Moderately capable	8 (32%)	

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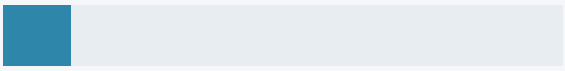
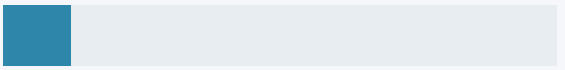
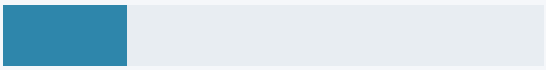
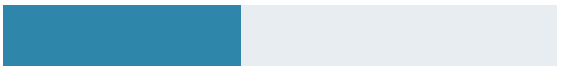
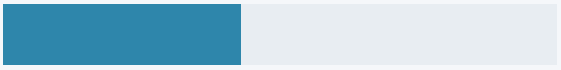
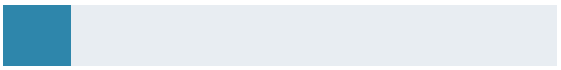
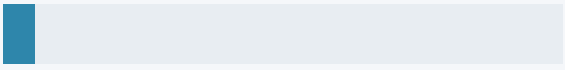
Partially capable	**13 (52%)**	
Not at all capable	**3 (12%)**	

When asked specifically about their knowledge of emerging fuel alternatives and of EV charging technologies and business models, confidence among Polish respondents was alarmingly low. 56% felt only 'slightly confident', 28% were 'not confident at all', and 16% felt 'moderately confident'. Strikingly, not a single respondent (0%) felt 'very confident' in this domain.

Response	Count	Visualisation
Moderately confident	**4 (16%)**	
Somewhat confident	**14 (56%)**	
Not at all confident	**7 (28%)**	

Key Insight: Given that these are precisely the core technical areas in which the sector must develop competence to survive, this near-total lack of strong confidence is one of the most operationally significant findings from the Polish survey. It perfectly validates and illustrates the "specialised skills shortage" those operators identified earlier as their primary business threat.

Interest in exploring new, innovative business models and product diversification strategies to align with EGD goals was surprisingly enthusiastic among Polish respondents. A combined 80% expressed solid interest, split evenly with 40% being 'very' interested and 40% 'moderately' interested. Only 16% were 'slightly' interested, and a mere 4% were 'not interested at all'.

Response	Count	Visualisation
Moderately interested	**10 (40%)**	
Very interested	**10 (40%)**	
Slightly interested	**4 (16%)**	
Not at all interested	**1 (4%)**	

Overall preparedness to adapt to sustainability-driven changes, framed to encompass regulatory, energy, commercial and organisational dimensions, was rated as only "slightly" prepared by 48% of Polish respondents, with a further 40% feeling "not prepared at all." Only 12% felt "moderately" prepared, and not a single respondent (0%) felt "very" prepared. It perfectly highlights the critical need for immediate, targeted educational interventions to bridge this massive readiness gap.

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Response	Count	Visualisation
Moderately interested	**10 (40%)**	
Very interested	**10 (40%)**	
Slightly interested	**4 (16%)**	
Not at all interested	**1 (4%)**	

Self-identified Knowledge Gaps

Asked directly what knowledge they felt they most lacked, Polish respondents produced a clear hierarchy of gaps heavily skewed toward technical and financial competencies. Technical knowledge of alternative fuels was the most frequently cited, selected by 68% of respondents. Electric Vehicles (EV) infrastructure management followed at 56%. Financial planning for transformation, a critical enabler for making these necessary investments, was mentioned by 52%. Finally, digital skills and regulatory compliance tied, each being identified by 40% of the respondents.

Key Insight: The top three self-identified knowledge gaps (alternative fuels, EV infrastructure and financial planning) are highly specific and operational. This data perfectly corroborates their earlier assertion that a "specialised skills shortage" is their biggest business threat. The Polish sector does not just need general sustainability awareness; it needs hard, practical training on new energy technologies and how to finance them.

When asked which broader topics they would be interested in exploring, Polish respondents showed a strong preference for strategic and regulatory guidance. Two themes tied for the highest interest at 68% of respondents: strategic business adaptation and regulatory compliance. Alternative fuel adoption followed closely at 56%, and financial planning and risk mitigation at 52%. Customer engagement and marketing in the new fuel landscape garnered 40% of responses, while digital and data-driven decision-making and sustainable supply chain management tied for the lowest interest at 28% each. The striking alignment between their deep regulatory anxiety, their acknowledged skills

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gaps in alternative fuels, and their desire for overarching strategic business adaptation provides a firm, evidence-based foundation for curriculum prioritisation in Poland.

Training Access, Participation and Perceived Importance

One of the most significant findings from the Polish survey concerns the current state of training engagement. Despite the near-universal acknowledgement of their lack of preparedness for the upcoming sectoral changes, a substantial 76% of respondents had not participated in any sustainability-related training in the previous two years.

Response	Count	Visualisation
No	**19 (76%)**	
Yes	**6 (24%)**	

Key Insight: While 24% reported receiving recent "sustainability-related" training, the qualitative data reveals a fundamental misunderstanding of the term, as almost all of the reported training remains stubbornly anchored in the legacy operational model. With the exception of a single "EV webinar," the sessions consisted entirely of basic sales, marketing and routine operational tasks.

Access to relevant training was perceived as only 'slightly' easy by 44% and 'moderately' easy by another 44% of Polish respondents. A mere 8% found it 'very' easy, while 4% felt it was 'not at all' easy. This indicates that a vast majority experience notable friction when trying to find appropriate educational resources. This lack of straightforward access perfectly aligns with the sector's daily struggle with high operational costs and tight margins; without clear, highly accessible and well-structured training pathways, operators simply do not have the time or resources to hunt down the specialised education they so desperately need for the green transition.

Response	Count	Visualisation
Moderately easy	**11 (44%)**	
Slightly easy	**11 (44%)**	
Not at all easy	**1 (4%)**	
Very easy	**2 (8%)**	

Despite the alarmingly low historical participation rates, the perceived importance of training for ensuring future business viability is universally acknowledged among Polish respondents. A full 100% of the surveyed operators rated training as crucial.

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Response	Count	Visualisation
Moderately important	**13 (52%)**	
Very important	**12 (48%)**	

Key Insight: This stark gap between the universally recognised necessity of training and the near-total absence of relevant recent participation is perhaps the defining tension of the Polish findings. Operators know they desperately need to learn in order to survive, but they are not currently getting the education they require. This dynamic serves as the most compelling argument for immediate, targeted VET interventions in the sector.

Insights from VET Trainer Interviews in Poland

Training gaps identified

Across all ten interviews, trainers converged on five substantive training gaps, mapping the specific knowledge deficits holding the Polish fuel retail sector back:

- **Strategic and financial planning:** Small operators and franchisees lack the analytical competencies and business acumen to plan long-term investments, diversify revenue streams, and manage operations under conditions of regulatory uncertainty.
- **Practical technological literacy:** Employees do not understand how new infrastructure works in practice. An inability to perform basic tasks - such as resetting a charging terminal or explaining different EV plug types to a customer - leads to immense frustration on the station floor.
- **Hospitality and customer experience:** The dynamics of a station visit are changing dramatically, with EV charging extending visits from 5 minutes to 30–40 minutes. Staff lack the skills to capitalise on this wait time, manage "rest stop" environments, and provide high-level customer service.
- **Missing "people-cantered"** transition narrative: Employees are frightened by the macro-level news of the green transition because it is not translated into local, operational realities. Without training that highlights the benefits and explains their future roles, staff fear they will simply lose their jobs as fossil fuel demand drops.
- **Digitalisation and service integration:** There is a pronounced gap in digital competencies, specifically regarding the integration of non-fuel services, digital payment processing, and the management of mobile applications.

> “Looking at the employees and managers of smaller stations – they are poorly prepared and very stressed. There is a lot of talk about the green transition in the media, but at the stations themselves, there is a lack of clear communication about what this means for them. People are afraid they will lose their jobs if no one buys traditional fuel anymore.”
> **— VET Trainer, Poland**

Barriers to Delivering New Content

Trainers also identified a distinct set of barriers on the delivery and resource side, which compound the gaps described above. Three recurring obstacles emerged:

- **The "dual-speed" preparedness gap:** Major fuel companies possess the capital, strategies, and internal training to manage the transition. In contrast, independent station owners act

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reactively rather than strategically, often lacking the foundational vision and financial resources required to even engage with new training.

- **Alienating, overly technical language:** The limited training materials that do exist are highly specialised. They consist mostly of corporate internal documents, market reports or technical documentation written by engineers and lawyers, making them completely inaccessible to the average station manager or independent owner.
- **Fixation on legacy compliance training:** Current VET offerings for the sector are rigid and outdated. They focus almost exclusively on day-to-day operations and legacy compliance - such as occupational safety and health (OSH), cash handling procedures, and the transport of hazardous materials (ADR) - leaving no room for strategic or transformational education.

> “The materials I have encountered are written in the language of engineers and lawyers, making them completely incomprehensible to the average station manager or salesperson. There is a lack of accessible, business-oriented ‘step-by-step’ materials.”
> **— VET Trainer, Poland**

Recommended Pedagogical Approaches

While Polish trainers highlighted a severe lack of existing industry-specific programs, their insights into the sector's shortcomings provide a clear blueprint for how future curricula must be designed:

- **Coherent, sector-specific programming:** Move away from scattered, fragmented courses (e.g., a generic ESG course) toward comprehensive programs specifically tailored to the unique realities of the fuel retail environment.
- **Accessible, "step-by-step" business guidance:** Replace dense market reports and engineering manuals with practical, business-oriented guides that help station owners understand exactly how to implement changes and find new revenue streams.
- **Practical technology troubleshooting:** Shift technical training away from high-level engineering concepts toward basic, hands-on operational troubleshooting so staff can confidently assist customers using new EV infrastructure.
- **Role evolution training:** Curricula must actively guide staff through the psychological and operational transition from traditional "fuel dispenser operators" into modern "digital customer service specialists and energy advisors."
- **People-centred communication:** Training must fundamentally explain the green transition in a way that alleviates fear, focusing on the practical benefits and the new opportunities available in an expanded, hospitality-driven station model.

> “Current training for this industry is very rigid. There is a severe lack of accessible, people-centred training that would explain the green transition by highlighting its benefits.”
> **— VET Trainer, Poland**

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4. Sectoral Prospects & Recommendations

4.1 Transnational Overview:

The sectoral prospects identified across France, Germany, Greece, Italy and Poland confirm that the future of fuel retail will be shaped by a gradual but unavoidable shift from conventional fuel distribution towards diversified mobility, energy and service models. The national findings do not suggest a single, uniform transition pathway. Instead, they reveal a sector facing several overlapping pressures: electrification, declining fossil fuel demand, alternative fuels, digitalisation, changing customer behaviour, regulatory uncertainty and the need for new revenue streams. The implication for the inFUELencer curriculum is clear. Training must not be designed as a general sustainability course. It must function as a practical transformation tool that helps fuel retailers interpret these trends and make realistic operational, financial and strategic decisions.

Across the consortium, electrification is one of the most visible future trends, but it is not the only one. Respondents in several countries associate the future of the sector with EV charging infrastructure, longer customer dwell times and the gradual repositioning of stations as places where customers do more than refuel. In France, EV charging is already part of the future training agenda, particularly because rural stations must assess whether charging infrastructure can be financially viable in low-density contexts. In Italy, electrification is recognised as a major trend, but retailers remain cautious because conventional fuel demand is still structurally important and the timing of return on investment remains uncertain. In Poland, electrification is linked to the transformation of stations into hospitality and service hubs, since customers may spend significantly longer on site while charging. In Germany, electrification is understood within a broader multi-energy model that also includes HVO, e-fuels, biofuels, conventional fuels during the transition period and customer-oriented mobility services.

The decline of fossil fuel demand is another major future pressure, but its meaning differs across national contexts. In Germany, it is clearly recognised as one of the main drivers of business transformation. In Greece and Poland, the decline of traditional fuel demand is experienced more anxiously, especially by smaller operators that lack the capital to reposition quickly. In Italy, retailers face a timing mismatch: they understand that mobility is changing, but many still serve a customer base that remains heavily dependent on conventional fuels. This creates uncertainty about when to invest, how much to invest and which technologies will become commercially viable. The inFUELencer curriculum should therefore avoid presenting the transition as a sudden replacement of one model by another. It should instead help operators manage a phased transition in which conventional fuels, alternative fuels, EV charging and non-fuel services may coexist for several years.

A consistent finding across countries is that future competitiveness will depend on the capacity to connect energy transition with service diversification. Fuel stations are increasingly expected to operate as mobility hubs, local service points, convenience destinations or customer-oriented retail environments. This shift is not only technical. It changes the role of the site, the role of staff and the logic of customer value. As one Polish VET trainer explains, future training should address “how to build relationships with customers who spend more time at our stations” and should explain “how EV chargers and alternative fuels work, in simple terms, without unnecessary engineering details.” This insight is important because it reframes the green transition as a service transformation. Staff will not only need to understand new fuels or charging points. They will also need to support customers, communicate clearly, manage waiting time and contribute to a better station experience.

Training preferences across the consortium show strong demand for practical, flexible and modular learning. France demonstrates a particularly strong preference for self-paced online learning combined with live online elements, which reflects the rural and single-station profile of its respondents. These operators cannot easily leave their business for long training sessions, so flexibility becomes a condition for participation. Germany also points clearly towards short, flexible and blended learning formats, with curriculum design recommendations suggesting both 1-to-2-hour micro-modules and half-day versions. Poland strongly favours blended learning, followed by self-paced online learning, again reflecting the need to combine accessibility with practical engagement.

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Italy shows a stronger preference for in-person and blended training, especially workshops and local events, because respondents and VET providers emphasise operational content, applied learning and direct interaction. Greece also confirms the need for practical relevance and accessible formats, particularly because some operators remain sceptical about the immediate necessity of training.

These preferences should guide the structure of the inFUELencer curriculum. The curriculum should not be a long, linear course that assumes learners can commit extended time away from their business. It should be organised as a modular learning pathway with short entry points, practical units and optional deeper modules. Micro-modules of 1 to 2 hours would be useful for frontline staff and time-constrained operators, while half-day sessions could support more strategic topics such as financial planning, business model adaptation, EV investment decisions and regulatory navigation. Blended learning should be treated as the default transnational model, but with enough flexibility to allow stronger online delivery in rural contexts and stronger in-person delivery where local workshops and industry partnerships are more effective.

The preferred training topics show a strong convergence across the consortium, even when national priorities differ. France places financial investment knowledge at the centre, followed by sustainable business models, customer-oriented innovation and EV charging operations. This shows that French retailers want to understand not only what the transition requires, but how to finance it and make it viable. Germany prioritises digital transformation, customer-oriented innovation, alternative fuels and EV-related content, reflecting a more advanced diversification landscape where operators need to manage complexity. Greece highlights alternative fuels and technologies, financial investment and environmental compliance, which corresponds to a market where small operators need practical guidance on both technology and survival. Italy points towards digital station management, EV infrastructure, alternative fuels, regulatory compliance and business-transition planning. Poland places environmental compliance first, followed by sustainable business models and alternative fuels, showing that regulatory anxiety and strategic adaptation are closely connected.

This convergence suggests that the inFUELencer curriculum should be organised around a small number of core pillars. The first pillar should focus on energy transition and alternative fuels, including biofuels, HVO, e-fuels, hydrogen, EV charging and the practical implications of multi-energy stations. The second should focus on EV charging operations and customer support, including basic troubleshooting, charger management, customer questions and service integration. The third should focus on digital transformation and smart station management, including digital payments, data use, operational monitoring and customer communication tools. The fourth should focus on sustainable business models and service diversification, helping stations identify new revenue opportunities beyond fuel. The fifth should focus on regulatory compliance, incentives and financial planning, since investment uncertainty and policy complexity are among the strongest barriers across the consortium.

Pedagogical advice from VET trainers reinforces the need for practical, adult-oriented learning. Trainers across the national sections recommend workshops, case studies, demonstrations, peer learning, problem-solving activities, role play, simulations, mobile microlearning, short videos, coaching and real-world examples. German expert validation strongly supports action-oriented learning, practical demonstrations, mobile-first microlearning for station staff and real learning places where learners can experiment. Italian VET providers emphasise in-person training, workshops, local events, operational content and case-based approaches, while also stressing the need to involve industry actors, policymakers, networks, car manufacturers and equipment providers. Greek trainers converge around practical relevance, learner differentiation and assessment methods connected to real workplace needs. Polish trainers are especially clear that training must be people-centred, accessible and linked to daily work rather than abstract climate language.

The qualitative insights are particularly useful for curriculum design. Polish trainers warn that current training is too rigid and that there is “a severe lack of accessible, people-centred training that would explain the green transition by highlighting its benefits.” This should be treated as a transnational warning, not only a Polish observation. If training is framed only as compliance, it may increase resistance or fear. If it is framed as a pathway to new services, employability and business resilience,

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it is more likely to engage operators and staff. Similarly, Italian VET providers note that resources "exist but are scattered across sectors" and that there is "no integrated curriculum linking fuels, mobility, energy transition and business transformation." This confirms that the inFUELencer curriculum should provide coherence, not just additional content. Its added value will depend on its ability to connect topics that are currently treated separately.

A further pedagogical implication concerns learner differentiation. Owners and managers need strategic content on investment decisions, regulation, financing, partnerships and business model adaptation. Frontline workers need practical content on customer communication, safety, charger operation, alternative fuel explanation, digital tools and troubleshooting. VET trainers need updated sector-specific resources and a training-of-trainers component, because several national inputs suggest that the training ecosystem itself is not yet fully prepared for the transition. Learners with limited digital confidence must not be excluded by overly complex platforms or technical language. For this reason, the curriculum should use plain operational language, concrete examples, visual explanations, reusable tools and short applied exercises.

Policy and external support needs are equally important. Across the consortium, respondents repeatedly indicate that training alone will not secure the transition. Fuel retailers need grants, investment subsidies, tax incentives, clearer regulations, reduced bureaucracy, coaching, local partnerships and access to reliable information. France points strongly towards grants, financing guidance and investment-readiness tools, especially for rural single-station operators. Germany stresses grants, investment support, regulatory clarity, technology neutrality and stable long-term policy frameworks. Greece highlights the need for subsidies and more personalised regulation based on station capacity and revenues, rather than horizontal requirements that place the same burden on businesses with very different resources. Italy calls for tax incentives, more public funds, simpler and clearer regulations and financial support. Poland calls for clear and stable regulation, simplified procedures, investment subsidies, tax breaks and grants for infrastructure modernisation.

This pattern shows that the inFUELencer curriculum should include a dedicated component on navigating support mechanisms, even though the project cannot itself finance infrastructure investment. Retailers need to understand what support may exist, how to assess eligibility, how to prepare investment decisions and how to connect training outcomes with business planning. A curriculum that includes funding guidance, ROI tools, investment checklists, compliance roadmaps and examples of realistic diversification pathways would be more useful than a curriculum limited to awareness-raising. In the Greek context, for example, one respondent called for "more personalised regulations based on each station's capacity and revenues rather than the horizontal approach that currently exists." This comment captures a wider transnational concern: policy frameworks must recognise that small rural operators and large multi-site companies do not have the same capacity to adapt.

The future of the sector will therefore depend on both internal capability and external enabling conditions. Fuel retailers need new skills, but they also need a policy and support environment that makes transformation possible. The curriculum can address knowledge, confidence and decision-making capacity, but infrastructure investment requires financial and regulatory support. This means the inFUELencer project should position the curriculum within a wider transition ecosystem involving VET providers, chambers of commerce, local authorities, professional associations, energy companies, equipment suppliers, mobility actors and policymakers.

The overall recommendation is to develop a flexible, modular and practice-led curriculum that translates the green transition into concrete decisions for fuel retailers. It should begin from the realities of the sector: time pressure, uneven digital confidence, small-business vulnerability, regulatory uncertainty and the need to protect business viability. It should combine online and blended learning, offer short and standard-duration modules, use practical tools rather than abstract theory, and include case studies from different territorial contexts. Its central purpose should be to help retailers move from awareness to implementation: understanding future trends, evaluating business

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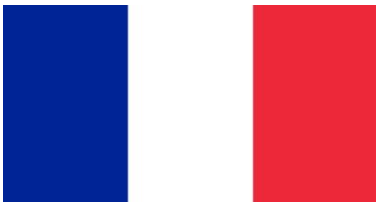
options, preparing staff for changing roles, accessing support mechanisms and developing resilient service models for the next phase of European mobility.

4.2 National Contexts

4.2.1 France



This section focuses on future prospects, training preferences and support needs in France. The findings directly inform the design of the inFUELencer curriculum. The French data points toward strong latent demand for training, provided that the programme is flexible, operationally grounded and connected to financing and implementation realities.

Priority Training Areas

Comment: Financial investment knowledge is the highest training priority.

Training Area	Mentions	Visualisation
Financial Investments	**23 (92%)**	
Sustainable Business Models	**15 (60%)**	
Customer-oriented innovation	**15 (60%)**	
EV Charging Station Operations	**15 (60%)**	
Supply Chain Management	**14 (56%)**	
Digital transformation	**13 (52%)**	
Environmental compliance	**10 (40%)**	
Alternative fuels and technologies	**8 (32%)**	

The strongest training priority is financial investment knowledge, selected by 92.0% of respondents. This is the most unambiguous result in the French training-preference data and should shape curriculum design. Retailers are not only asking what technologies exist; they want to know how to finance transformation and assess investment risk. Sustainable business models, customer-oriented innovation and EV charging operations each receive 60.0%, followed by supply chain management at 56.0% and digital transformation at 52.0%.

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Key Insight: For France, the curriculum should begin from the economics of transition. Financial investment, business model adaptation and EV charging operations are the gateway topics through which broader sustainability and digitalisation content can become credible to fuel retailers.

Preferred Training Format

Comment: Flexible online learning formats are strongly preferred.

Response	Count	Visualisation
Online self-paced + live online	**19 (76%)**	
In-person only	**11 (44%)**	
Blended learning	**9 (36%)**	
Live online only	**4 (16%)**	

Training preferences show a strong need for flexibility. 76.0% select self-paced online learning as their primary preferred format, while additional respondents combine self-paced online learning with blended, live online or in-person components. This aligns closely with the rural and single-station profile of the sample: operators cannot easily leave their business for long training sessions. The open response on duration points toward a half-day format, suggesting that short, modular units would be more realistic than long linear courses.

Key Insight: Flexible formats are clearly preferred, with **76% favouring a mix of self-paced and live online learning**. While **44% still value in-person training**, and **36% blended formats**, fully online live-only options (**16%**) are less attractive, highlighting the need for flexibility and autonomy in learning.

Preferred Training Duration

Response	Count	Visualisation
Half-day (approx. 3 - 4 hours)	**13 (52%)**	
1 - 2 hours (short module)	**8 (32%)**	
Full day	**4 (16%)**	

Key Insight: 52% prefer half-day sessions; 32% prefer 1–2-hour modules. 84% prefer sub-full-day sessions. inFUELencer should default to half-day modular units with optional deeper full-day intensives.

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Most Useful Learning Resources

Resource Type	Respondent Insight
Case studies	Respondents value **concrete, local examples of small rural fuel stations adapting their offer**, especially those facing similar constraints (low density, multi-service role).
Mixed / blended resources	3 respondents expressed the need for **practical, flexible resources combining several formats**, adapted to limited time and multi-activity operations typical in rural areas.
Lectures + discussion	1 respondent highlighted the importance of **interactive sessions (presentations + discussions)** to share experiences between peers and learn from real-life situations.
Digital / web resources	4 respondents mentioned **simple and accessible digital tools**, including websites and AI, seen as useful for **quick, operational insights without heavy time investment**.
Trade journals / internet	
Textbooks	1 respondent mentioned textbooks, but this remains marginal, as **retailers prefer directly actionable and field-oriented content**.
Best practice examples	2 respondents emphasised the value of replicable best practices from similar rural territories, helping to project feasible changes at local level.

Likelihood of Participating in the inFUELencer Programme

Comment: Interest in participating in the programme is very high.

Response	Count	Visualisation
Very likely	**13 (52%)**	
Likely	**11 (44%)**	
Slightly likely	**1 (4%)**	

The willingness to participate is very high: 52.0% report being very likely to join an inFUELencer programme and 44.0% likely, leaving only one respondent slightly likely and none clearly unwilling. This is a decisive finding. French retailers are not rejecting training; they appear to be waiting for training that is accessible, relevant and immediately useful.

Support Needed to Adapt to the Green Transition

Comment: Financial support is viewed as essential for successful transition.

Support Type	Mentions	Visualisation
Grants / financial investment support	**24 (96%)**	

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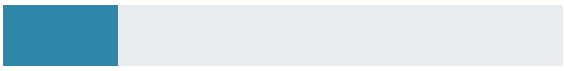
Training	**20 (80%)**	
Coaching / other support services	**7 (28%)**	

Support needs confirm that training alone cannot carry the transition. 96.0% of respondents identify grants or other investments as necessary, while 80.0% identify training and 28.0% mention other support services such as coaching. This is a structural message for policymakers and project partners: curriculum development should be accompanied by signposting toward financing instruments, public support schemes and advisory services. Without this bridge, training may improve awareness but fail to trigger action.

Open responses on future services are concentrated around electric charging points, with several respondents explicitly naming the installation of charging infrastructure. Other responses mention a new fuel, biofuels and hydrogen, diversification, and the need to remain a local service point. One respondent captures the rural logic especially well: the future station should become an indispensable local service point, adapting to new mobility while maintaining a simple, accessible and territorially embedded offer.

> “The challenge will be to become an indispensable service point for residents, adapting to new mobility patterns while maintaining a simple, accessible offer rooted in the local area.”
> **— Retailer, France**

Insights from VET Trainer Interviews in France

French VET trainers recommend practical, applied and contextualised learning formats. The most frequently recurring methods include practical workshops, real case studies, analysis of feedback from experience, workplace-based training, individual coaching, simulations, peer learning and short hybrid formats. Several trainers stress that the content must remain up to date through technological watch, integration of field feedback and regular revision. This is particularly important for a sector where standards, technologies and business models are evolving quickly.

The partnerships proposed by trainers are also revealing: regions, chambers of commerce, energy companies, equipment manufacturers, mobility start-ups, local authorities, universities and professional organisations. This suggests that the inFUELencer curriculum should not be positioned as an isolated training product. It should be embedded in a wider ecosystem capable of connecting learners to expertise, equipment knowledge, financing, regulation and territorial mobility strategies.

Recommended Implications for the inFUELencer Curriculum in France

- Design short, modular units that can be followed by rural single-station operators without extended absence from work.
- Prioritise financial investment decision-making, EV charging operations, sustainable business models and customer-oriented innovation.
- Use practical case studies based on rural stations, local mobility needs, low-density demand and constrained investment capacity.
- Integrate financing guidance, regulatory interpretation and investment-readiness tools into the learning pathway.
- Combine self-paced online resources with optional live, blended or coaching elements to support different levels of digital confidence.
- Use checklists, decision trees and simple financial planning tools that operators can reuse directly after training.

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• Develop partnerships with chambers of commerce, regional authorities, energy companies and equipment suppliers to strengthen practical relevance and credibility.

Key Insight: The French prospects are shaped by a strong demand for practical transition support. The inFUELencer curriculum should position itself as a bridge between awareness and action: helping retailers understand technologies, test business options, identify financing pathways and implement realistic service diversification strategies.

4.2.2 Germany

Most Useful Training Areas (Multi-select)

Training Area	Mentions	Visualisation
Digital Transformation	**15 (60%)**	
Customer-Oriented Innovation	**14 (56%)**	
Alternative Fuels & Technologies	**13 (52%)**	
EV Charging Station Operations	**10 (40%)**	
Environmental Compliance	**10 (40%)**	
Sustainable Business Models	**8 (32%)**	
Financial Investments	**7 (28%)**	
Supply Chain Management	**6 (24%)**	

Key Insight: Digital Transformation (60%) tops the list - overtaking Alternative Fuels (52%). Customer innovation (56%) and EV operations (40%) also score highly. These four domains form the natural core of inFUELencer's curriculum architecture.

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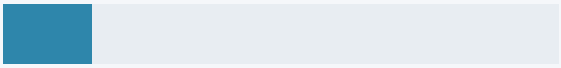
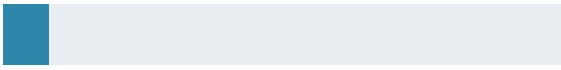
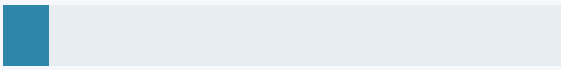
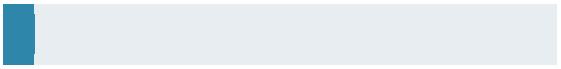
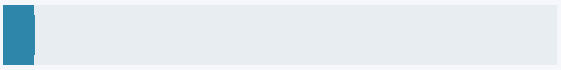
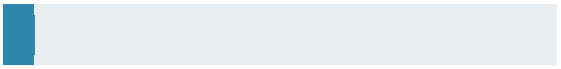
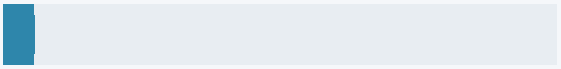
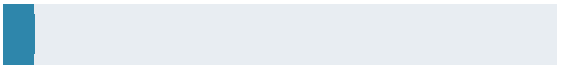
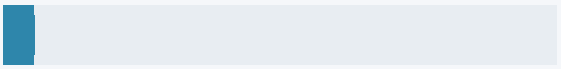
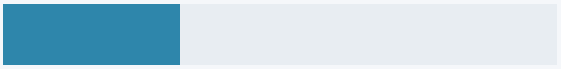
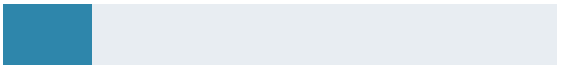
Preferred Training Format

Response	Count	Visualisation
Blended (online/in-person, flexible)	**11 (44%)**	
All three formats (online live + in-person + blended)	**4 (16%)**	
In-person only	**2 (8%)**	
Online self-paced + live online	**2 (8%)**	
Online self-paced + in-person	**1 (4%)**	
Online self-paced + blended	**1 (4%)**	
In-person + blended	**1 (4%)**	
Live online only	**1 (4%)**	
Live online + blended	**1 (4%)**	
All formats combined	**1 (4%)**	

Key Insight: Across format preferences, 'blended or flexible' is included in the preferred format of ~76% of respondents. inFUELencer should design as blended-first, with flexible module access across digital and in-person channels.

Preferred Training Duration

Response	Count	Visualisation
Half-day (approx. 3 - 4 hours)	**13 (52%)**	
1 - 2 hours (short module)	**8 (32%)**	
Full day	**4 (16%)**	

Key Insight: 52% prefer half-day sessions; 32% prefer 1–2-hour modules. 84% prefer sub-full-day sessions. inFUELencer should default to half-day modular units with optional deeper full-day intensives.

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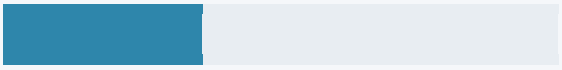
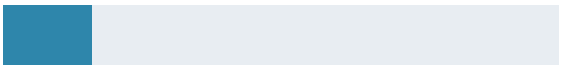
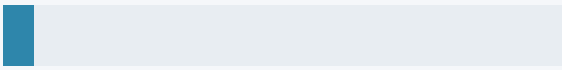
Most Useful Learning Resources

Open-text responses (n=11 provided answers). Key themes from respondents include:

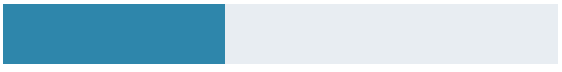
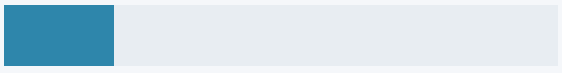
Resource Type	Respondent Insight
Case studies	Most frequently cited - 5 responses. Real-world examples of fuel station transformation are most valued.
Mixed / blended resources	2 respondents: 'a mix of everything' / 'from all - mixed resources.' Flexibility in format is valued.
Lectures + discussion	1 respondent: 'presentation and discussion format' - active learning preferred over passive.
Digital / web resources	2 respondents: website information and AI tools ('AI for quick overview').
Trade journals / internet	1 respondent specifically cited Fachzeitschriften (trade journals) and internet searches.
Textbooks	1 respondent mentioned textbooks, though this was a minority preference.
Best practice examples	1 respondent cited best practice examples as most useful.

Likelihood of Participating in inFUELencer Programme

Response	Count	Visualisation
Likely	**11 (44%)**	
Slightly likely	**9 (36%)**	
Very likely	**4 (16%)**	
Not likely	**1 (4%)**	

Key Insight: 96% of respondents indicate at least 'slightly likely' to participate in inFUELencer. 60% are 'likely' or 'very likely.' This is a strong market signal for programme rollout. Only 1 respondent (4%) indicated 'not likely.'

Support Needed to Adapt to Green Transition

Support Type	Mentions	Visualisation
Grants / financial investment support	**10 (40%)**	
Training	**5 (20%)**	

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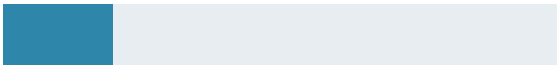
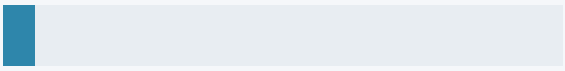
Coaching / other support services	**5 (20%)**	
Regulatory clarity	**1 (4%)**	

Key Insight: Grants and investment support (40%) top the need – training alone is not sufficient. inFUELencer must embed links to funding routes and investment case frameworks within the curriculum to address the real enablement gap.

Policy & Regulatory Changes Needed (Open Text)

Key themes from respondents (translated from German)

Policy Theme	Representative Insights
Technology neutrality	Most cited theme. Respondents called for 'technology openness - away from electricity-only mandates.' Multiple responses expressed frustration with e-mobility bias at the expense of synthetic fuels and HVO.
Stable long-term frameworks	'Stable laws that secure investments beyond electoral cycles.' Investment uncertainty created by shifting political frameworks is a major barrier.
Clear e-fuels / HVO Roadmap	'Political framework conditions for the ramp-up of synthetic fuels must be created.' HVO permitting uncertainty (municipalities unsure of their authority) was specifically highlighted.
Reduce bureaucracy	'Generally, significantly fewer bureaucratic requirements; faster permitting.' Repeated by 5+ respondents. Simplification of approval processes for alternative fuel infrastructure is urgently needed.
Tax incentives for alternative fuels	'Tax cuts for alternative fuels, subsidies for public fast-charging infrastructure.' Price parity support needed.
Clearer direction	'Just tell us where the journey is going.' Clarity and planning certainty valued above all else by operators.

Additional Curriculum Suggestions

Four respondents provided substantive feedback (translated):

Suggestion	Detail
Cost-effective content adaptation	'Are there content elements that can be easily changed without incurring major costs? That would be interesting.' - Suggests modular, updatable curriculum architecture.
No additional suggestions	'No' - From 2 respondents who felt the current scope was sufficient.
No response / placeholder	1 respondent submitted placeholder text only.

The interviews suggest a blended first training design. Flexible online components can support access, while in person or practice-based elements are needed for technology acceptance, troubleshooting, customer interaction and confidence building. Several experts emphasised that the format should vary by target group: managers and owners may benefit from webinars, newsletters,

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expert briefings and structured workshops, while station staff may require shorter, more accessible and more practical formats.

For station level employees, the interviews point strongly toward mobile micro learning. Short videos, simple explanations, operational examples and customer scenarios appear more suitable than long webinars or highly technical presentations. Training should be designed from the perspective of the actual learner, including part time employees, students, service staff and operators working directly with customers. The interviews also suggest that learning should include real or simulated practice environments, allowing participants to test ideas, reflect on customer situations and build confidence through concrete experience.

For Germany, the curriculum should prioritise seven areas:

1. Strategic business adaptation beyond traditional fuel sales
2. Regulatory and carbon management literacy, including GHG quotas, ESG, carbon footprint accounting and policy interpretation
3. Practical fuel and powertrain literacy, including EV charging, HVO, e fuels, hydrogen, E10, E20, bioethanol and conventional fuels
4. Economic and infrastructure readiness, including investment logic, funding opportunities, customer demand, planning security and net congestion
5. Digital transformation and market monitoring, including smart station management, newsletters, sector platforms and digital customer tools
6. Customer oriented service, retail and communication skills, including product explanation, marketing, conflict handling and service quality
7. Staff centred, practice-based learning formats, including case studies, demonstrations, expert sessions, webinars, newsletters and short mobile learning videos

These recommendations reflect the convergence between survey findings and expert interviews: German fuel retailers appear relatively experienced and cautiously optimistic, but require practical, business oriented and regulation aware support to translate transformation pressure into viable operational strategies. The additional interviews further show that curriculum design must account for the realities of station level work. Many employees work part time, deal directly with customers and face growing product and service complexity. Future training should therefore be simple, accessible, role specific and appreciative of the work performed on site.

At the same time, the curriculum should remain technology open. Rather than assuming a single transition pathway, it should help learners understand how different options, including electrification, HVO, e fuels, bioethanol blends and conventional fuels during the transition period, relate to climate neutrality, energy security, customer needs and business viability. This will make the curriculum more robust against future regulatory and technological change.

4.2.3 Greece

This section presents findings from the fuel retailer survey and draws on qualitative insights from ten VET trainer interviews conducted in Greece, mapping Greek retailers' training preferences, anticipated sector futures, and the structural support they identify as essential to navigate the green transition.

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Priority Training Areas

When asked to identify the training areas most useful to them (Q22), Greek retailers produced a clear and internally coherent hierarchy. Alternative fuels and technologies were the dominant choice, mentioned by 19 respondents (73.1%), a figure that mirrors the knowledge gaps self-reported in Q15a and confirms that this is the area where operators most acutely feel underequipped. Financial investment knowledge and environmental regulatory compliance were jointly ranked second, each selected by 12 respondents (46.2%), reflecting both the economic anxiety that pervades the Greek dataset and the persistent concern about regulatory pressure without adequate policy clarity. Sustainable business models and customer-oriented innovation were each selected by 9 respondents (34.6%), followed by digital transformation (26.9%) and EV charging operations (23.1%).

Responses	Mentions	Share
Alternative fuels and technologies	**19**	**73.1%**
Financial investments	**12**	**46.2%**
Environmental regulatory compliance	**12**	**46.2%**
Sustainable business models	**9**	**34.6%**
Customer-oriented innovation	**9**	**34.6%**
Digital transformation	**7**	**26.9%**
EV charging operations	**6**	**23.1%**

Key Insight: The top training priorities form a coherent cluster spanning the technical, financial, regulatory and commercial dimensions of the same transformation challenge. Crucially, they align precisely with the knowledge gaps identified in Q15a, validating both the consistency of the Greek data and the firm evidence base it provides for inFUELencer curriculum design.

What is particularly significant about this hierarchy is its breadth. Operators are not asking for one narrow technical topic; they are signalling that they need to develop competence simultaneously across multiple interconnected domains. No single module can address this cluster in isolation. Effective curriculum design must treat these areas as complementary and mutually reinforcing strands of the same learning journey.

Preferred Training Format and Duration

On the question of preferred training formats (Q23), blended learning, combining online and in-person elements in a flexible structure, was the clear frontrunner, selected by 15 respondents (57.7%). Live online sessions were preferred by 7 respondents (26.9%) and self-paced online courses by 6 (23.1%). Only 2 respondents (7.7%) selected exclusively in-person sessions, a finding consistent with the predominantly rural and single-operator profile of the Greek sample, where travel to centralised venues presents a genuine practical barrier.

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Responses	Count	Share
Blended (online + in-person, flexible)	15 (57.7%)	
Live online sessions	7 (26.9%)	
Self-paced online course	6 (23.1%)	
In-person only	2 (7.7%)	

Key Insight: The strong preference for blended and online formats reflects not simply logistical convenience but the operational reality of Greek micro-operators, who run their stations with minimal staffing and cannot easily absent themselves for extended training periods. Flexible, modular access is not a nice-to-have; it is a structural requirement for reaching this audience.

The few respondents who provided open-text comments on preferred duration gave markedly different estimates (Q24): one cited 35 hours of seminar-format training as feasible, while another called for 'short seminars of a few hours'. This divergence itself signals the importance of modular curriculum design, a training programme that can be entered at different points and completed incrementally will serve this heterogeneous audience far better than a fixed, linear structure requiring sustained commitment to a predetermined schedule.

Likelihood of Participation in the inFUELencer Project

Despite the structural barriers and financial pressures documented throughout the Greek survey, demand for a sector-specific training programme is substantive. 61.5% of respondents (16 out of 26) rated their likelihood of participating in the inFUELencer training programme as ‘Likely’, with a further 8 respondents (30.8%) rating it as 'very likely'. Only 2 respondents (7.7%) expressed low or negligible likelihood of participation.

Responses	Count	Share
Likely	16 (61.5%)	
Very likely	8 (30.8%)	
Slightly likely	1 (3.8%)	
Not likely	1 (3.8%)	

Key Insight: A combined 92.3% likely-or-very-likely response rate is among the most unambiguous findings in the entire Greek dataset. It resolves the apparent tension between the high perceived importance of training and the near-total absence of recent participation, in favour of latent demand. Greek fuel retailers are not indifferent to training; they have simply not had access to a programme that speaks to their operational reality.

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This finding, read alongside the identified 88.5% non-participation rate (Q19), underscores both the scale of the unmet need and the receptiveness of the audience that the inFUELencer project is entering. The market is essentially open, but first interventions must earn trust quickly, deliver visible practical value, and avoid the pedagogical failures that trainers themselves identified in their interviews.

New Services for the Next Decade

Responses to the open question on which new services fuel retailers should offer over the coming decade were sparse, as most respondents either skipped the question or offered no structured answer. The one explicitly volunteered response was hydrogen. This echoes the qualitative elaborations already noted (see Section 2.2.3), where hydrogen appeared as a longer-horizon expectation from at least three respondents, and it aligns with a subset of operators who are already looking past the current electrification wave toward what they perceive as the sector's eventual destination. While EV charging and biofuels dominate the medium-term picture, this anticipatory awareness of hydrogen, although underdeveloped, represents a signal for longer-term curriculum and policy planning that should not be entirely discounted.

Support Needed for Green Transition Adaptation

When asked what type of support they need to adapt to the green transition, Greek retailers were unambiguous. Grants and other investment were mentioned by 21 respondents (80.8%), making it by far the most widely identified need. Training followed at 57.7% (15 respondents), and other support services at 15.4% (4 respondents).

Responses	Count	Share
Grants or other investments	**21 (80.8%)**	
Training	**15 (57.7%)**	
Other support services	**4 (15.4%)**	

Key Insight: The 80.8% figure for financial support must be read as more than a preference; it is a structural precondition. For operators already managing thin margins under heavy fiscal pressure, no training programme, however well designed, will translate into investment action unless accompanied by accessible financing mechanisms.

This does not diminish the value of training; rather, it defines its operational scope. The inFUELencer project can credibly address skills, strategic awareness, and business model thinking. However, the financial enablement required for physical infrastructure investment (e.g., EV chargers, equipment upgrades, energy efficiency improvements) lies outside the programme's direct remit and must be the subject of targeted advocacy to national and European funding authorities. A curriculum that helps operators understand and navigate available financing instruments, such as ESPA funds, energy transition subsidies, EU cohesion instruments, would extend the project's impact considerably beyond its classroom footprint.

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Policy and Regulatory Recommendations

Responses to Q29, on what regulatory changes would help operators manage the transition, were sparse but qualitatively significant. One respondent called for 'more personalised regulations based on each station's capacity and revenues rather than the horizontal approach that currently exists', a pointed critique of one-size-fits-all policy design that structurally disadvantages micro-enterprises. A second respondent expressed deep scepticism that meaningful regulatory change was achievable at all, beyond the provision of subsidies, a posture that reflects the chronic distrust of institutional frameworks visible throughout the Greek dataset.

The single substantive open-text response to Q30, on curriculum design considerations, captured a posture of passive fatalism present in a portion of the Greek operator community: one respondent expressed the view that training is 'not currently necessary, but we may be called upon to learn new things in the future'. This is a posture the inFUELencer project must address directly; not by lecturing operators about urgency, but by making the immediate practical relevance of its content unmistakably clear from the very first module.

Insights from VET Trainer Interviews in Greece

The VET trainer interviews conducted in Greece produced qualitative evidence that is unusually coherent and directly complementary to the retailer survey findings. Across questions on curriculum priorities, pedagogical methodology, assessment design, and learner differentiation, trainers converged on a consistent set of principles, while offering individually distinct perspectives that give the overall picture depth and texture. Their collective recommendations constitute, in effect, an evidence-based design brief for the inFUELencer curriculum.

On the Sector's Direction & Curriculum Content Priorities

Trainers broadly agreed that the fuel retail sector is undergoing genuine but uneven transformation: stations are gradually repositioning from single-purpose refuelling points toward multi-service hubs, but the pace of change varies considerably across operators, geographies and business sizes. Several trainers emphasised that this transition is simultaneously green and digital and these two aspects cannot be treated as separate. As one trainer noted, whenever a station changes its services, operating model or customer communication, it almost always incorporates new digital tools. A curriculum that addresses only the environmental dimension will fail to reflect the operational reality of its learners.

> “When a station changes its services, operating model or customer communication, it almost always incorporates new digital tools. The green and digital transitions cannot be separated.”
> **— VET Trainer, Greece**

On curriculum content, trainers were consistent in their priorities: alternative fuels and electrification, digital transformation, strategic planning and business model adaptation, and regulatory compliance. One trainer articulated these most systematically, identifying green transition literacy, EV and alternative fuel knowledge, digital skills, strategic planning, and regulatory compliance as the five pillars a new curriculum must address. Across all interviews, there was a strong consensus that the curriculum must present these topics not as isolated modules but as interconnected dimensions of the same sectoral transformation, because that is precisely how operators experience them.

On Pedagogical Approaches and Learning Methods

All trainers converged on blended learning as the optimal delivery format; namely, a combination of structured content, live interaction, and flexible access. This consensus was expressed consistently, with several trainers specifying that digital components should function in support of learning rather than as its primary vehicle. Beyond this consensus, trainers put forward a coherent set of

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methodological principles that together form a practical design philosophy for adult learners in active employment.

- Short, modular units with explicit objectives: Adults in working contexts need to understand immediately what they will learn and how it will serve them. Long, front-loaded programmes that delay practical relevance will lose their audience. Each module should be self-contained enough to be accessed and completed independently.
- Realistic case studies and practical scenarios: Generic best-practice examples drawn from idealised conditions do not resonate with Greek single-station operators. What works are situations that reflect everyday realities (e.g., common errors, realistic customer interactions, operational decisions) that mirror what participants actually face on shift.
- Role-play and simulated customer dialogues: One trainer noted from direct experience that when learners enter a simulated customer dialogue, they quickly discover where their real communication difficulties lie. Role-play is not merely engaging; it is diagnostically valuable. Communication skills are uniquely resistant to theoretical instruction; they must be practised to develop.
- Checklists, process visuals, and step-by-step guides: For technical content, one trainer made a strong case for materials that allow immediate application without reliance on memory. Checklists and process diagrams serve a dual purpose: they support learning during the programme and remain useful reference tools in daily operations long after it ends.
- Brief digital support elements: short videos, self-assessment quizzes, and reflection exercises were recommended as supplements that serve learners with limited time – provided they do not become the primary mode of delivery. The risk of over-digitising content for a learner group with uneven digital confidence must be actively managed in programme design.

> “A good curriculum for this sector must be modular, flexible, and contextually grounded. But above all, it must help participants understand not just what is changing, but why that change matters for their role and for the future of the sector.”
> **— VET Trainer, Greece**

On Training Barriers and Delivery Challenges

Trainers also identified a distinct set of barriers on the delivery side, which compound the knowledge gaps described above. Three were consistent across most interviews.

- Psychological distance from the transition as a concept: For many participants, the 'green transition' sounds abstract, political or remote from their daily work. Trainers must first bridge this gap, by repositioning the transition as a direct operational reality rather than an external mandate, before substantive learning can take place.
- Time pressure and content density: Programme structures that push trainers to cover too much in too little time produce superficial learning. One trainer noted, participants hear a great deal of information but do not have the space to process, connect or apply it. This is particularly damaging for transition-related content, where understanding requires reflection, not just exposure.
- Group heterogeneity and digital inequality: Classes frequently mix participants with very different experience levels, technical knowledge and digital confidence. Without differentiated design, some participants are lost while others are bored, and those with limited digital confidence risk disengaging at the first moment a digital tool appears. The trainer needs not just good content but a supportive structure that ensures no one feels left behind.

> “When the programme relies even partially on digital elements, some participants feel at ease and others do not. If this is not anticipated in the design, it can generate reluctance or refusal. The trainer needs not just good content but a supportive structure so that no one feels left behind.”
> **— VET Trainer, Greece**

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On Assessment and Certification

Trainers were unanimous that formal certification only has value if it reflects genuine competence rather than information recall. Several specific approaches were recommended. Scenario-based assessment, with practical exercises that test whether learners can apply knowledge in a recognisable professional situation, was preferred over written tests by multiple trainers. One trainer called for multi-dimensional assessment capturing knowledge, application, judgement and reflective capacity: can the learner not only describe a change but explain how they would implement it in their own context and what difficulties they would anticipate? One trainer 3 added that communication performance should be assessable, as a learner who understands the content but cannot convey it clearly to a customer or colleague has a practical deficit that written tests will not reveal. Another trainer proposed a light-touch portfolio approach, in which learners accumulate small evidence of learning over time, making progress visible and providing a more complete picture of development than any single assessment event.

On Differentiated Learner Groups

Trainers identified three learner groups warranting particular attention in curriculum design – each with distinct characteristics, needs and risks.

- Experienced operators with deep roots in the traditional operating model: Paradoxically, these are both the most knowledgeable and the most challenging learner group. Their long familiarity with established ways of working is a genuine professional asset, but it can also generate resistance to the perceived value of new content. One trainer noted that these professionals need respect for their existing expertise, sufficient time to process change, and explicit bridges connecting new learning to lived professional experience. A curriculum that ignores their prior knowledge will not earn their engagement.
- Single-station owners and small business managers: These operators typically manage their stations alone, with minimal staff and no dedicated training function. For them, one trainer stressed that the curriculum must reach practical conclusions quickly, without requiring sustained theoretical engagement before delivering actionable content. Every module should offer a usable takeaway; something the learner can apply on their next working day.
- Learners with limited digital confidence: One trainer was careful to note that this is not principally an age issue; it is about prior exposure, self-confidence and previous educational experience. Where a programme incorporates digital elements without anticipating the range of digital comfort levels in the room, it risks generating withdrawal rather than engagement. Inclusive design requires that no participant should feel excluded or left behind when a digital tool enters the learning environment.

4.2.4 Italy

Fuel retailers engaged are uncertain about changes in their business model (40%) with 60% who have high expectations. 0% explicitly reject change. At the same time, the most impactful trends identified are the spread of electric vehicles; the digitalisation of services; and the alternative fuels development, together with the reduction in fuel demand. The EV diffusion is clearly perceived as the dominant driver of change.

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Key Trends Expected to Impact the Business

Expected Trend	Mentions	Visualisation
Decline in fossil fuel demand	**10 (40%)**	
Electrification / EV	**20 (80%)**	
Bio-/alternative fuels	**11 (44%)**	
Digitalisation / smart stations	**12 (48%)**	
New mobility solutions (car sharing, etc.)	**6 (24%)**	
Skills shortage	**2 (8%)**	
Taxation and new regulation	**8 (32%)**	

Do You Think Your Business Model Will Need to Be Adapted in the Next 5-10 Years?

Feedback	%	Visualisation
I am not sure	**60%**	
Yes	**40%**	

The qualitative inputs confirm and deepen the quantitative findings. Although the forms export provides only short open-text responses, the analysis of the material helps explain the logic of the results. There are several “themes” and issues which arises from the data. Retailers associate future transformation first with EV-related services, as mentioned above. When asked what new services stations will need to offer, the most frequent references point to EV charging, often explicitly phrased as “Ricarica EV”, “Colonnine ricarica elettrica”, or “Servizi per veicoli elettrici”. A smaller group mentions complementary services such as “bar e piccolo ristorante”. Respondents do not imagine the future only as “less fuel”: they imagine a different service ecosystem and “energy hub”, around mobility. The direction is not yet fully articulated, but the broad model is emerging. Another relevant topic is that the transition is seen as broader than electrification alone: in the responses on other expected trends, retailers mention “car sharing”, “environmental rules”, “electric vehicles”, charging stations, and taxes. This suggests that retailers interpret the transition is seen as multi-dimensional and cross-sectoral aspect, as a combined shift involving technology, regulation and mobility behaviour, and that they are not only reacting to a product change, but to a market-system change. Another relevant topic is related to the (strong) training demand on operational transformation: when asked where they need more knowledge, the leading responses are “Digitalisation and smart station management”; “EV charging infrastructure and management”; “Alternative fuel technologies”; “Environmental rules and sustainability requirements”.

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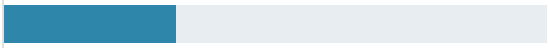
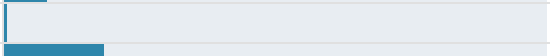
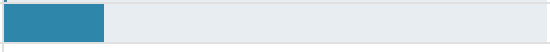
Areas Where You Need More Support to Face the Future Transformation in the Sector

Feedback	Mentions	Visualisation
Technologies related to alternative fuels	13 (52%)	
Infrastructures and management of EV related technologies	15 (60%)	
Digitalisation and smart solutions	18 (72%)	
Innovation strategies and investment planning	7 (28%)	
New regulations and sustainability requirements	10 (40%)	

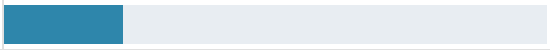
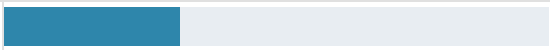
With the following priority knowledge areas: “Digitalisation and smart station management”; “Alternative fuels”; “Strategical adaptation of the business model”; and “Environmental compliance”.

Would You Be Interested in Deepening the Following Thematics?

Feedback	Mentions	Visualisation
Strategical adaptation of the business model	13 (52%)	
Alternative fuels	15 (60%)	
Digitalisation and smart solutions	18 (72%)	
Sustainable management of the value chain	2 (8%)	
Client engagement	1 (4%)	
Financial planning and risk mitigation	4 (16%)	
Compliance with new regulations and sustainability standards	9 (36%)	

With a practical and operational (and not theoretical) demand. A curriculum shall be applied, concise and operational, not purely theoretical. Then, training should not only be practical, but also face-to-face and directly usable. Respondents favour hands-on, applicable learning experiences, and prefer in-person training (64%), followed by blended formats (32%), while live online training attracts low support in this sample, and self-paced online courses remain a minority preference (20%).

Which Kind of Training Content Do You Think is More Engaging?

Feedback	Mentions	Visualisation
Online self paced trainings	5 (20%)	
Live online courses	1 (4%)	
In person trainings	16 (64%)	
Hybrid format (online + in presence trainings)	8 (32%)	

Another important topic is related to the importance of “policy support”, not only market adaptation needs. In the open responses on support and policy needs, respondents refer to “tax incentives”; “more public funds”; “simpler and clearer regulations”; and “financial support”. It reinforces the idea that, in the specific Italian case, the business case for transition is mediated by policy clarity and investment support. Retailers do not see transformation as something they can carry alone, with the transition perceived as dependent on external support (public) frameworks.

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To sum up, several specifically Italian challenges emerge from the survey: there is a timing mismatch between the current customer base and the expected future market. The country public charging network is growing, especially in Northern Regions such as Veneto, yet retailers still operate in a mobility context where conventional fuel demand remains structurally important. This creates uncertainty about “when” and “how” investment in new infrastructure will pay back. Moreover, the survey indicates a capability gap in digital and multi-energy transition, not just in green policy literacy. Retailers are demanding for knowledge related to digital station management, alternative fuels and EV charging. The challenge is as much managerial and organisational as it is environmental. Third, the sample points to a training access problem: the issue appears to be not the low interest in training; seems the relevant relative absence of accessible, sector-specific and directly applicable learning opportunities. Finally, many of the respondents are based in areas where infrastructure roll-out, customer uptake, and diversification opportunities may differ sharply from major cities.

Based on the main findings, some general recommendations can be considered. It’s important to prioritise a general business-transition curriculum, not only related to sustainability issues. The survey shows that retailers need support in making viable business decisions under conditions of transition and that training should connect green transition topics with revenue models, investment logic, customer services and risk management. The digitalisation and EV-related management shall be considered at the centre of the learning curriculum: digital station management, charging infrastructure and alternative fuel knowledge should be core modules rather than optional ones, as these areas are where knowledge demand is strongest. Practice led delivery formats shall be prioritised, given the preference for in-person and blended learning, with case-based learning, local examples, operational checklists and implementation scenarios rather than long theoretical units. A module on regulation, incentives and compliance navigation shall be included: the beneficiaries engaged identify regulatory complexity as a barrier. A practical training unit on permits, incentives, compliance requirements and policy interpretation would likely have high value in the Italian context. It’s still very important to consider the need to “differentiate” the content for the user (single-site or networked operators) and the importance of engaging other relevant actors (networks, associations, big companies): the adaptation capacity, investment choices and service models are likely to differ, so the curriculum should consider modular or tiered pathways.

That’s evident also from the survey addressing the VET providers: while the retailer survey highlights a sector under pressure and in transition, these interviews reveal a training ecosystem that is only partially aligned the above mentioned emerging needs, with a “systemic” misalignment between practical, operational, transition-oriented skills which emerge from the retailers perspective, and what training systems currently offer (also considering that it is generally fragmented, and often not sector-specific), reinforcing the idea that the transition to a more sustainable model is not merely technological or regulatory, but also capacity-driven.

A total of 20 VET actors were contacted, with 10 completed interviews (mainly through video and phone calls). It represents a pretty strong engagement rate. It’s important to consider that the interviews to VET providers were designed as open, structured discussions aimed at capturing the perceptions of sector change; the skills gaps; the general training system limitations and challenges; and the recommendations for curriculum design. The qualitative nature of the data provided some deep key insight, despite a relatively small sample size and the fact that none of the VET providers engaged is directly engaged and “specialised” in the fuel sector.

In general, we can emphasise a strong convergence on sector transformation drivers: both groups identify the same major transformation drivers: the electrification and EV charging related issues; the alternative fuels; the importance of digitalisation; the regulatory and compliance pressure; and in general, the evolving mobility models. Fuel retailers highlighted these as external pressures, while VET providers recognised them more as emerging training needs. It means that the transition is acknowledged broadly across the ecosystem and is not limited to one target group.

There’s also a strong overlap between the retailers’ perceived knowledge gaps and the VET trainers’ assessment of missing competencies. While retailers identify needs in digitalisation, EV infrastructure,

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alternative fuels and regulatory compliance, VET providers confirm that the sector lack of specific technical knowledge, with limited understanding of new energy systems and a general poor strategic skills set for business transformation. This convergence may validate the reliability of the findings.

The VET system seems to have “structural gaps”, with a general lack of sector-specific training provision and the absence of dedicated training pathways for fuel retailers. Some beneficiaries provided some information on general training about sustainability, energy, and business management, but there seems to be little (or no) training specifically tailored to the fuel retail sector. The problem is not related (only) with the access to resources, but to their relevance and targeting. VET providers indicate also that training resources “exist but are scattered across sectors” and that “there is no integrated curriculum linking fuels, mobility, energy transition and business transformation”. There’s also a limited preparedness of VET trainers themselves which emerges: some respondents highlight that they have a general overview and comprehension of the market, but it is mainly related to general culture and interest: the majority of the people engaged not always fully up to date with sector developments and lack direct exposure to fuel retail business models. This creates a situation where not only retailers lack skills, but also the trainers lack specific expertise, with an essential component for the training of trainers.

VET providers explicitly considered the need for practical training and applied learning: from their perspective, and actually aligned with fuel retailers evidences, it would be better to provide in-person training, workshops, and local events, with operational content and case-based approaches, with a clear need to reinforce and exploit partnerships with industry, policymakers, and networks (it’s interesting to consider that some beneficiaries mentioned not only big networks and associations – like FAIB; FIGISC; etc. – or big companies – like ENI; Q8; etc. which generally “take care of the training and innovation within their own group”; but also car manufacturers: with all the innovations and new technologies related to advanced alternative fuels or new mobility trends, like the EV, new challenges may arise. For example, “suggested lubricant”, which was part of the value chain in the past. Cars are more and more complex, so fuel retailers could be at the forefront to provide relevant information, feedback, and insights, about potential damages and trends (“improper manoeuvres or criticalities on specific car models”).

Transition cannot and shall not be addressed by training alone, but must be part of a broad “ecosystem engagement”, to bridge fuel retail, mobility and energy transition as a sort of “energy hub approach”, and address real operational scenarios.

4.2.5 Poland

This section presents findings from the fuel retailer survey and draws on qualitative insights from ten VET trainer interviews conducted in Poland, mapping Polish retailers' training preferences, anticipated sector futures and the structural support they identify as essential to navigate the green transition.

Priority Training Areas

When asked to identify the training areas most useful to them, Polish retailers produced a clear and internally coherent hierarchy. Environmental compliance was the dominant choice, mentioned by 72%, a figure that perfectly reflects the profound anxiety surrounding legislative instability and the acute need operators feel to understand looming regulatory mandates. Sustainable business models ranked

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second, selected by 60%, followed closely by alternative fuels and technologies at 52%. This combination mirrors the high interest in strategic adaptation noted earlier, confirming that operators are seeking a blend of overarching business strategy and practical knowledge of new energy solutions. Digital transformation and EV charging operations were jointly ranked next, each selected by 40%, reflecting the recognised need to modernise station infrastructure. Finally, customer-oriented innovation and supply chain management were each selected by 32%, with financial investments ranking last at just 24%.

Training Area	Mentions	Visualisation
Financial Investments	**6 (24%)**	
Sustainable Business Models	**15 (60%)**	
Customer-oriented innovation	**8 (32%)**	
EV Charging Station Operations	**10 (40%)**	
Supply Chain Management	**8 (32%)**	
Digital transformation	**10 (40%)**	
Environmental compliance	**18 (72%)**	
Alternative fuels and technologies	**13 (52%)**	

Preferred Training Format and Duration

On the question of preferred training formats, blended learning – combining online and in-person elements in a flexible structure - was the clear frontrunner among Polish respondents, selected by 64%. Online self-paced learning was the second most popular choice at 40%. Traditional in-person sessions were preferred by only 20% of respondents, and online live sessions ranked lowest at 16%. This strong preference for flexible, asynchronous, and blended formats aligns perfectly with the operational realities of the Polish sector; operators and managers dealing with high operational costs and tight margins require training solutions that they can integrate into their demanding schedules without being forced away from daily station operations.

Response	Count	Visualisation
Online self-paced	**10 (40%)**	
In-person	**5 (20%)**	
Blended learning	**16 (64%)**	

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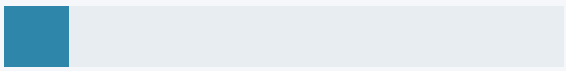
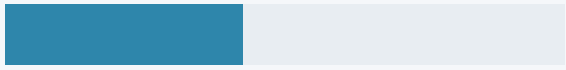
Live online	**4 (16%)**	

When it comes to the preferred or feasible training duration, Polish respondents showed a distinct preference for comprehensive programs. A significant majority, 60%, preferred training lasting 'more than 1 full day'. 'Full-day' and '1-2 hours' sessions were each preferred by 16% of respondents, while 'half-day' sessions were the least favoured at just 8%.

This clear preference for extended duration (76% favouring a full day or more), combined with their previously stated preference for flexible, blended formats, suggests that Polish operators are willing to dedicate substantial time to upskilling, provided the training can be accessed modularly and does not demand uninterrupted absence from their businesses.

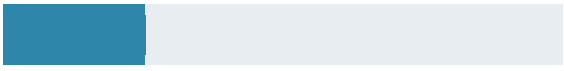
Likelihood of Participation in the inFUELencer Project

Despite the structural barriers and financial pressures documented throughout the Polish survey, demand for a sector-specific training programme is overwhelmingly strong. A total of 52% of respondents rated their likelihood of participating in the inFUELencer training programme as 'very likely', with a further 48% rating it as 'likely'. Not a single respondent expressed a low or negligible likelihood of participation.

Response	Count	Visualisation
Very likely	**13 (52%)**	
Likely	**12 (48%)**	

Support Needed for Green Transition Adaptation

When asked what type of support they need to adapt to the green transition, Polish retailers prioritised training and targeted financial support. Training was the most widely identified need, cited by 92% of respondents. Grants and other investments followed at 56%, and other support services at 24%.

Support Type	Mentions	Visualisation
Grants / financial investment support	**14 (56%)**	
Training	**23 (92%)**	
Coaching / other support services	**6 (24%)**	

Policy and Regulatory Recommendations

Responses on what regulatory changes would help operators manage the transition, were sparse but qualitatively significant, revealing a sector that feels heavily burdened by red tape. Several respondents called for "clear and stable regulations" and the "simplification of regulations," noting that a reduction in bureaucracy is necessary to allow for long-term investment planning. Others stressed

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the need for targeted financial mechanisms, such as investment subsidies, tax breaks and grants for infrastructure modernisation.

The open-text responses, which focused on curriculum design considerations, reflected a strong demand for accessibility and practical application, as well as a desire to learn from existing case studies. Operators and VET trainers highlighted that the inFUELencer curriculum feature short, modular units with practical examples, investment calculation tools and materials that can be easily adapted to local conditions and staff retraining. This is a posture the inFUELencer project must address directly: not by lecturing operators about macro-level compliance or abstract climate goals, but by demonstrating the day-to-day, financial and operational relevance of its content from the very first module.

Insights from VET Trainer Interviews in Poland

On the Sector's Direction & Curriculum Content Priorities

Polish trainers and experts highlighted that the sector is undergoing an inevitable, if uneven, transformation. Stations are rapidly shifting away from traditional, fossil-fuel-dependent models toward multi-service hubs and hospitality rest stops. Because customers spend significantly longer periods at the station while their vehicles charge (30–40 minutes), staff must transition their skills from basic fuel dispensing to customer service, hospitality, and energy management.

Trainers stressed that this transition is both green and digital. The curriculum must integrate these themes rather than treating them as disconnected silos. Suggested priority pillars include:

- Energy transition and alternative fuels (presented without unnecessary engineering jargon).
- Development of non-fuel services and revenue diversification.
- Digitalisation, automated management, and in-app payment systems.
- Practical regulatory understanding and sustainable business strategy.

> “How to build relationships with customers who spend more time at our stations. How EV chargers and alternative fuels work – in simple terms, without unnecessary engineering details.”
> **— VET Trainer, Poland**

On Pedagogical Approaches and Learning Methods

There is a strong consensus that educational methods must be highly pragmatic, engaging, and flexible to accommodate time-strapped professionals. The preferred methods include blended learning, practical workshops, and microlearning modules. The trainers' recommended methodological principles include:

- **Short, modular units:** Designed to easily fit into the demanding schedules of independent station employees without requiring extended absences.
- **Experience-based materials:** Utilising real-world case studies, group discussions, and concrete examples from the market.
- **Interactive tools and business simulations:** Emphasising practical exercises rather than simply asking learners to memorise regulations.
- **An attitude of adaptability:** Focusing on long-term change management and openness to continuous learning rather than one-time knowledge transfers.

> “The most effective methods are: practical workshops, case studies, blended learning, study visits, and business simulations.”
> **— VET Trainer, Poland**

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On Training Barriers and Delivery Challenges

Trainers identified several critical barriers on the delivery and learner side that must be actively managed:

- **Pace of change and information overload:** The rapid evolution of technology and policy makes it difficult to keep training content up-to-date.
- **Varying levels of knowledge:** Participants range from station owners interested in high-level strategy to low-wage workers who may view the training as an administrative burden.
- **Psychological resistance and fear:** Staff fear job obsolescence as fossil fuels decline; the curriculum must demystify the changes and show that these new skills increase their value in the job market.
- **Accessibility of materials:** Existing training is often scattered, overly technical, or written for lawyers and engineers, creating an intimidating barrier for daily station workers.

> “Station employees, who often work for low wages, may view green transition training as yet another unnecessary requirement from management. They need to be shown that these new skills will increase their value in the job market.”
> **— VET Trainer, Poland**

On Assessment and Certification

Trainers advocate for light-touch, practical assessments that value competence over memorisation. The key recommendations include:

- **Scenario-based assessments:** Testing whether staff can practically apply knowledge (such as troubleshooting an EV charger or handling customer questions during a wait period).
- **Open, flexible evaluation:** Moving away from formal, rigid written tests toward assessments that measure strategic thinking and adaptability.
- **Modular verification:** Allowing learners to complete and receive validation for individual modules at their own pace.

On Differentiated Learner Groups

Trainers identified three primary learner groups requiring tailored approaches:

- **Independent operators and micro-entrepreneurs:** These owners lack the capital and resources of large chains. The curriculum must provide simple investment tools and low-bureaucracy roadmaps for survival.
- **Frontline station staff:** Workers require direct, jargon-free instruction focusing on EV charging operation, foodservice, and digital payment assistance.
- **Trainees with varying digital confidence:** Courses must be designed with an inclusive approach so that both digitally confident and hesitant learners are supported.

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5. Conclusion

5.1 Synthesis of Key Insights

The findings from the inFUELencer initial curriculum research reveal a fuel retail sector under significant pressure to adapt to the green transition, with uneven readiness across countries and operators. While awareness of the need for transformation is relatively high, preparedness remains inconsistent, particularly among smaller and rural operators. Larger operators, such as those in Germany, are better positioned to embrace change due to greater access to capital, strategic planning capabilities, and infrastructure readiness. In contrast, smaller operators in countries like France, Greece, and Poland face significant barriers, including limited investment capacity, regulatory uncertainty, and operational constraints. These disparities highlight the need for tailored support and training to address the unique challenges faced by different types of operators.

The transition is not experienced uniformly across the sector. Electrification, declining fossil fuel demand, and digitalisation are recognised as key drivers of change, but the ability to respond varies widely. Many operators are diversifying their services, with non-fuel offerings such as convenience retail, car washes, and food services becoming more common. However, genuine energy diversification, such as the adoption of EV charging and alternative fuels, remains limited and highly dependent on local infrastructure, investment costs, and market demand. The findings also show that while operators are not resistant to change, many lack the practical skills, financial tools, and strategic confidence to act. This gap between awareness and implementation is a critical challenge that the inFUELencer curriculum must address.

The results also show that most respondents expect major business model changes within the next 5 to 10 years due to decarbonisation policies, electrification and declining fossil fuel demand. While awareness of sustainability-related regulations is relatively high, preparedness for transition remains moderate, particularly regarding alternative fuels, digitalisation and long-term business adaptation. Respondents identified operating costs, policy uncertainty and investment limitations as the main barriers to transition. At the same time, there is strong interest in practical and flexible training focused on digital transformation, alternative fuels, customer innovation and regulatory compliance. Overall, the findings highlight the urgent need for targeted support, sector-specific training and clearer policy frameworks to help fuel retailers remain competitive and sustainable during the ongoing transition.

The fuel retail sector in Europe is highly aware of the ongoing green transition and expects major business transformation in the coming years. Declining fossil fuel demand, electrification and digitalisation are viewed as the most significant future developments. Despite this awareness, preparedness levels remain moderate. Respondents identified gaps in sustainability readiness, alternative fuel knowledge and long-term business adaptation capabilities. Regulatory uncertainty, investment limitations and rising operational costs continue to slow transition efforts. The survey also demonstrates strong demand for practical and flexible vocational training, particularly in digital transformation, alternative fuels, customer innovation and regulatory compliance.

5.2. Consolidated Recommendations

To support the sector's transition, the inFUELencer project must focus on providing practical, sector-specific training that bridges the gap between awareness and action. The curriculum should prioritise key areas such as alternative fuels, EV infrastructure management, financial planning, regulatory compliance, and digital transformation. Training must be designed to address the specific needs of different types of operators, from small rural stations to large multi-site networks. For smaller operators, the focus should be on survival and viability, with modules on financial planning, investment risk management, and customer engagement. For larger operators, training should emphasise strategic planning, multi-energy models, and operational complexity.

The curriculum should also address broader barriers to transition, such as regulatory uncertainty, limited access to funding, and uneven customer demand. A dedicated component on navigating grants, subsidies, and policy frameworks is essential to help operators align their businesses with the

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green transition. Additionally, the curriculum must be modular and flexible, allowing operators to choose the topics most relevant to their needs and schedules. Blended learning formats, combining online and in-person elements, should be the default approach to ensure accessibility and engagement across diverse learner profiles.

In general, the findings suggest that future support should focus on:

- Flexible and practical sector-specific training
- Stronger guidance on regulatory compliance
- Business adaptation and sustainability planning
- Digital transformation and smart station management
- Improved access to grants and investment support
- Clearer and more stable long-term policy frameworks

The curriculum design recommendations for the inFUELencer project provide a clear and practical framework for delivering effective training to fuel retailers. The core curriculum modules focus on digital transformation, alternative fuels and EV operations, regulatory compliance, customer innovation, and financial planning, equipping participants with the essential skills needed for business transformation. A blended delivery format is recommended, combining online and in-person sessions to maximise flexibility. Each module should be offered in two formats: short micro-modules (1–2 hours) and standard half-day sessions (3–4 hours), allowing participants to choose based on their availability and learning preferences. The curriculum content should prioritise case studies and real-world examples, particularly from Germany's fuel retail sector, to ensure practical relevance.

To address financial and policy challenges, the curriculum should integrate grants, investment tools, and ROI frameworks into the training content. A dedicated policy module is also essential, focusing on navigating regulatory requirements, compliance with the European Green Deal, and advocating for technology neutrality. The curriculum should adopt a modular and updatable architecture, allowing content to be easily revised as regulations and market needs evolve.

The primary target audience should be multi-site operators with 10 or more stations in rural areas, as this group is currently underserved but has the highest potential for large-scale impact. These recommendations ensure the curriculum is flexible, practical, and aligned with the sector's needs, empowering fuel retailers to successfully transition in line with sustainability goals. The preference for short, flexible and blended learning formats will also guide the future training design approach.

5.3 Bridge to the Curriculum

The inFUELencer curriculum should be structured around five core pillars: energy transition and alternative fuels, EV charging operations and customer support, digital transformation and smart station management, sustainable business models and service diversification, and regulatory compliance and financial planning. Each pillar should include practical, action-oriented modules that focus on real business decisions rather than abstract concepts. For example, modules on EV charging should cover installation decisions, charger operation, maintenance, troubleshooting, and customer support. Similarly, modules on financial planning should include tools for assessing investment costs, expected returns, funding sources, and risk exposure.

The curriculum should also incorporate case studies, real-world examples, and peer learning opportunities to enhance practical relevance. Short micro-modules (1–2 hours) and standard half-day sessions (3–4 hours) should be offered to accommodate the time constraints of operators. Digital tools, such as mobile learning platforms and interactive simulations, should be used to engage learners and support self-paced learning. Additionally, the curriculum should include a training-of-trainers component to equip VET providers with updated, sector-specific resources and methodologies.

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In details, the findings provide key insights and priorities for the inFUELencer curriculum development:

1. Top Training Areas:
   The core curriculum should focus on five primary domains: energy transition and alternative fuels, EV charging operations and customer support, digital transformation and smart station management, sustainable business models and service diversification, and regulatory compliance and financial planning. These areas reflect the most critical skills and knowledge gaps identified by respondents.
2. Preferred Format:
   A blended/flexible learning format is preferred by the majority of participants. This indicates the need to prioritise flexible delivery methods over single-format approaches to accommodate diverse learner needs.
3. Preferred Duration:
   The majority of respondents prefer shorter sessions lasting half a day or less. This suggests that modules should be designed as 3 to 4-hour units, with options for 1 to 2-hour micro-learning sessions to maximise accessibility and engagement.
4. Learning Resources:
   Respondents value case studies and real-world examples as the most effective learning resources. Delivery should emphasise peer learning, discussions, and best practice sharing to ensure relevance and practical application.
5. Participation Intent:
   Almost all respondents are at least somewhat likely to participate in training. This confirms high market demand, indicating that the curriculum rollout is highly viable.
6. Primary Support Need:
   While training is important, a lot of respondents identified financial support (e.g., grants or investment) as their primary enabler for transition. The inFUELencer curriculum should align training content with funding opportunities to address this need.
7. Policy Blockers:
   Respondents highlighted the need for technology neutrality, regulatory stability, and reduced bureaucracy as critical policy improvements. The curriculum should include a module on navigating regulatory uncertainty and leveraging policy frameworks to help businesses adapt.
8. Curriculum Design Hint:
   Operators value modular, cost-effective content that can be updated as regulations evolve. The curriculum should be built on an agile, modular architecture to remain adaptable to future regulatory and market changes.

These insights emphasise the importance of designing a flexible, practical, and forward-looking curriculum that aligns with both market demands and the evolving needs of fuel retailers in the green transition.

5.4 Value for Stakeholders

The inFUELencer project has the potential to deliver significant value to a wide range of stakeholders. For fuel retailers, it offers a pathway to remain competitive and sustainable in a rapidly changing market. By equipping operators with the skills and knowledge needed to navigate the green transition, the curriculum can help them make informed decisions about investments, business adaptation, and customer engagement. For VET providers, the project provides a much-needed framework for delivering sector-specific training that addresses the unique challenges of fuel retail. By integrating technical, financial, and strategic content, the curriculum can enhance the capacity of trainers to support the sector's transformation.

For policymakers, the inFUELencer project supports the broader goals of the European Green Deal by helping to bridge the gap between awareness and implementation. By aligning training content with policy objectives and support mechanisms, the project can contribute to a more effective and inclusive transition. Finally, for the wider energy and mobility ecosystem, the project creates opportunities for

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collaboration between fuel retailers, VET providers, energy companies, equipment suppliers, and local authorities. By fostering partnerships and sharing best practices, the inFUELencer project can play a critical role in ensuring that the fuel retail sector is prepared for the future of sustainable mobility.

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ANNEX

Annex 1. Structured Interview to VET Trainers

Introduction:

We are a group of researchers from 5 different EU countries, looking to gather some relevant insights related to the fuel retail sector's, aiming to strengthen the transition to sustainability improving stakeholders' understanding of the current situation, future challenges, skills gaps, and training needs of fuel retailers in the context of the green transition and the European Green Deal, and equipping VET trainers with a tailored training curriculum, and providing fuel retailers with the skills and strategic tools needed for sustainable business transformation.

The survey to VET trainers is composed of different questions to explore the current sector status; the knowledge and skills needs and challenges encountered by fuel retailers; and sectoral prospects and recommendations: the survey considers a fully open discussion through a structured scheme to compare data end ensure cross-country analysis.

This survey is part of the Work package No.2 - Outlining of the inFUELencer Curriculum.

Specific objectives of the WP are to provide a comprehensive survey to assess current knowledge, challenges, and perspectives of the target groups, regarding business viability and sectoral transformation, ensuring data driven curriculum development; awareness-raising resource highlighting key insights into fuel retail business viability and transformation needs, fostering informed decision-making; structured framework to support the development of a VET curriculum, aligning with sectoral needs, regulatory trends, and sustainability principles; and precise learning objectives, thematic areas, training methodologies, and evaluation strategies in a tailored VET curriculum that equips fuel retailers with essential competencies for successful business transformation.

Surveys will be shared among the different countries engaged in the proposal, ensuring a unique structure, dataset, thus comparability of the data collected.

1: How long have you been working as a VET trainer? *

2: Have you ever delivered training on topics related to business viability and transformation (e.g. (innovation, diversification, sustainability)? *

3: Are you aware of the main changes affecting the fuel retail sector today (technological, environmental, regulatory)? If yes, what are they? *

4: How well prepared do you think fuel retailers currently are to deal with these sectoral changes? *

5: What is the most significant knowledge or skills gaps you expect among fuel retailers? *

6: Which competencies will be essential for fuel retailers in the next 5–10 years? *

7a: Are there specific areas where current VET offerings are insufficient or missing? Are you aware of any training resources or materials specifically tailored to the fuel retail sector? *

7b: Are you aware of any training resources or materials specifically tailored to the fuel retail sector? *

8: What topics should be prioritised in a new curriculum focused on sector transformation and business viability, especially with special attention on fuel retailers? *

9: What teaching methods or training formats do you think work best for this target group (ex. workshops; blended learning; …)? *

10: How confident are you with the current trends in the fuel retail sector (as declining fossil fuel sales and the shift toward alternative fuels; services provision; …) and in using training practices that are best suited for business viability and transformation in the sector? *

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11: What challenges do you foresee in delivering training on the topics of alternative fuels and business transformation? *

12: What partnerships or collaborations could strengthen the impact of a VET curriculum for fuel retailers?

13: Would you be interested in receiving specialised training content to improve your knowledge of the fuel retail sector? *

14: What advice would you give to ensure the curriculum remains future-proof as technologies and regulations evolve? *

Questions with * are mandatory.

Annex 2. Surveys to fuel retailers

Introduction:

We are a group of researchers from 5 different EU countries, looking to gather some relevant insights related to the fuel retail sector's, aiming to strengthen the transition to sustainability improving stakeholders' understanding of the current situation, future challenges, skills gaps, and training needs of fuel retailers in the context of the green transition and the European Green Deal. The survey to fuel retailers is composed of different questions to explore the current sector status; the knowledge and skills needs and challenges encountered by fuel retailers; and sectoral prospects and recommendations. The survey considers 30 questions and takes approximately 10–15 minutes to complete. All responses will be treated confidentially. Your time is deeply appreciated!

This survey is part of the Work package No.2 - Outlining of the inFUELencer Curriculum.

Specific objectives of the WP are to provide a comprehensive survey to assess current knowledge, challenges, and perspectives of the target groups, regarding business viability and sectoral transformation, ensuring data-driven curriculum development; awareness-raising resource highlighting key insights into fuel retail business viability and transformation needs, fostering informed decision-making; structured framework to support the development of a VET curriculum, aligning with sectoral needs, regulatory trends, and sustainability principles; and precise learning objectives, thematic areas, training methodologies, and evaluation strategies in a tailored VET curriculum that equips fuel retailers with essential competencies for successful business transformation.

Surveys will be shared among the different countries engaged in the proposal, ensuring a unique structure, dataset, thus comparability of the data collected.

1: What is the size of your fuel retail business? *

- Single station
- 2–5 stations
- 6–10 stations
- More than 10 stations

2: How long is your experience in the fuel retail sector? *

- Less than 3 years
- 3-5 years
- 5-10 years
- More than 10 years

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3: Where's your business primarily located? *

- Urban
- Suburban
- Rural

4: What are the services currently provided? * (Multiple Options)

- Fuel
- Car wash
- EV Charging
- Food/coffee services
- Other services (e.g. convenience store/minimarket/...)

5: What's your perceived business viability in the next 5-10 years? *

- Low
- Moderate
- High
- Very High
- I prefer not to answer

6: How familiar are you with European Green Deal objectives and decarbonisation policies? *

- Not aware at all
- Slightly aware
- Moderately aware
- Extremely aware

7: How strongly do you believe environmental regulations will affect your business in the next 5–10 years? *

- Not at all
- Slightly
- Moderately
- Significantly

8: What are the main challenges your business currently faces? * (Multiple Options)

- Fuel margins
- Operational costs
- Staff training gaps
- Uncertainty in regulations
- Competition
- Investment capacity
- Other: _____

9: What are the main obstacles to adopting new technologies? * (Multiple Options)

- Installation costs
- Low customer demand
- Technical knowledge
- Space/capacity
- Regulations
- Other:

10: Do you expect your business model will require major changes within the next 5-10 years? *

- Yes
- No
- Not sure

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11: Which trends do you expect to have the biggest impact on your business? * (Multiple Options)

- Decline in fossil fuel demand
- Electrification
- Bio/alternative fuels;
- Digitalisation (automation, apps, smart stations)
- Competition/Threat of new industry entrants or substitutes services (e.g. new mobility services)
- Specialised skills shortage
- New taxation

12: What new services do you believe fuel retailers will need to offer in the next decade?

13: What other trends are you also anticipating?

14: Do you think that you are equipped with the necessary skills to support the transition to sustainable fuel retailing and services? *

- Significantly
- Moderately
- Partially
- Not at all

15: How confident do you feel in terms of knowledge of emerging fuel alternatives (biofuels, hydrogen, e-fuels) and of EV charging technologies and business models? *

- Not confident at all
- Slightly confident
- Moderately confident
- Very confident

16: How interested are you in exploring new, innovative business models and product diversification strategies to align with EGD goals? *

- The European Green Deal (EGD) aims to make the EU the first climate-neutral continent by 2050 with an interim goal of at least 55% net emission reduction by 2030
- Not interested at all
- Slightly interested
- Moderately interested
- Very interested

17: How prepared do you feel to adapt your business to sustainability-driven changes? *

(*Sustainability-driven changes may consider: i) environmental and climate policies (EU Green Deal; CO_2 reduction obligation; sustainability/emission reporting and compliance requirements; restrictions on fossil fuels and combustion engines); energy and fuel transition (declining demand for petrol/diesel; introduction of biofuels, e-fuels, hydrogen; electric vehicles charging infrastructure and related services; multi-energy stations); business model and revenue shifts (reduced fuel margins; growth of non-fuel revenues; new pricing and investment strategies; partnerships with energy providers or mobility operators); organisational changes - energy efficiency upgrades; digitalisation and smart station management; staff re-skilling and new job roles)*

- Not prepared at all
- Slightly prepared
- Moderately prepared
- Very prepared

18a: Which knowledge do you believe you lack most to manage the future transformation? * (Multiple Options)

- Technical knowledge of alternative fuels
- Electric Vehicles (EV) infrastructure management
- Digital skills
- Financial planning for transformation
- Regulatory compliance

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- Other: _____

18b: May you be interested to explore the following topics? * (Multiple Options)

- Strategic business adaptation
- Alternative Fuel adoption
- Digital and data-driven decision-making
- Sustainable supply chain management
- Customer engagement and marketing in the new fuel landscape
- Financial planning and risk mitigation
- Regulatory compliance and environmental standards
- Other: _____

19: Do you think is easy for you to access relevant training to your sector? *

- Slightly
- Moderately
- Very
- Not at all

20: Have you participated in sustainability-related training in the past 2 years? *

- Yes
- No

21: If yes, what type of training was it?

22: How important is training for ensuring your future business viability? *

- Not important at all
- Slightly important
- Moderately important
- Very important

23: Which are the most useful training areas for you? * (Multiple Options)

- Sustainable business models
- Alternative fuels and technologies
- EV charging operation
- Supply chain management
- Digital transformation
- Financial investments
- Customer-oriented innovation
- Environmental compliance
- Other: _____

24: Which format for training content would you find most engaging? * (Multiple Options)

- Online self-paced
- Online live sessions
- In-person sessions
- Blended (online/in person or flexible format)

25: Which is your preferred/feasible training duration? *

- 1–2 hours
- Half-day
- Full-day
- More than 1 full day

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26: Which learning resources do you find most useful? *E.g. blog or website information; text books; case studies*

27: How likely are you to participate in a training program that focuses on business viability skills tailored specifically for the fuel retail sector? *

- Not likely
- Slightly likely
- Likely
- Very likely

28: What kind of support do you need to adapt the business to the green transition? * (Multiple Options)

- Training
- Other support services (e.g. coaching)
- Grants or other investments
- Other: _____

29: What kind of policy/regulatory changes may help the business navigate the transition?

30: Is there anything else we should consider in the design of the inFUELencer Curriculum?

Questions with * are mandatory.

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