

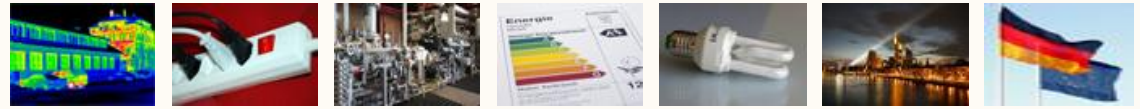


Federal Office
of Economics
and Export Control
BAFA



The Market for Energy Efficiency Services and the NEEAP

Presenter: Dr. Michael Cemerin, Federal Office of Economics and Export Control (BAFA)
Event: CA EED Vilnius
Date: 23.10.2013



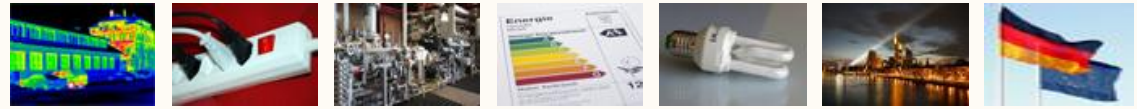
Importance of the Market

- Ambitious national and international energy efficiency targets
- Instruments: Programs (e.g. funding for refurbishing of buildings, subsidy for energy audit), government regulation (e.g. standards for new buildings, tax regulation)
- BUT: to fulfill the targets, this is not sufficient → we need the market for energy efficiency services. It is the crucial instrument to tap the energy resources which can be made accessible by energy efficiency measures
- In order to develop this market further, we need to know the market → Due to limited information, Germany conducted a study about the market for energy efficiency services (done by Prognos, IFEU, Hochschule Ruhr West)
- Study will be used as a data and information basis for the NEEAP [(fulfillment of EED Art. 18 (e))] and is also an important resource for the further work of the Federal Energy Efficiency Center → Market observation is one of our most important tasks

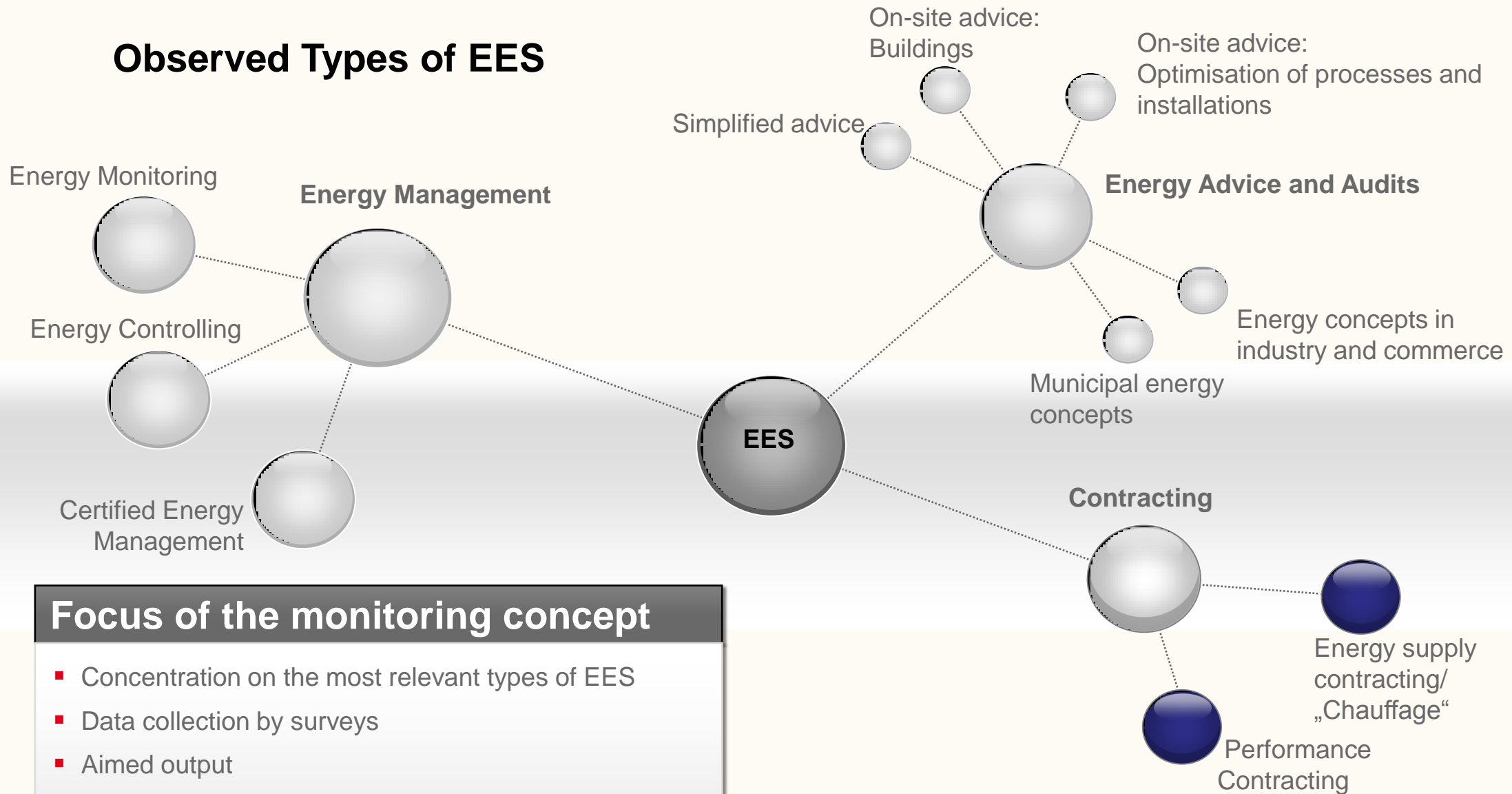


Market Research

- Problems
 - Heterogeneity of the EES market
 - No common definition of various types of EES
 - Which EES need to be covered by a market monitoring? How are EES defined?
- Existing studies on EES market
 - Only few publicly available studies
 - Problem of circular reference: Data submitted to the JRC ESCO Status Report; and afterwards those numbers were cited by the experts who submitted them
 - Existing numbers from previous studies are often old and highly uncertain
- Data provision by EES providers
 - No incentives for EES providers to share business data
 - Also associations of EES providers have problems to get information from their members
- Reduced possibilities to gather reasonable market data

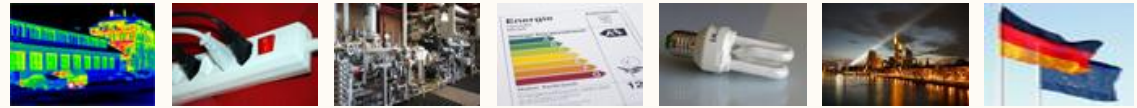


Observed Types of EES



Focus of the monitoring concept

- Concentration on the most relevant types of EES
- Data collection by surveys
- Aimed output
 - Characterization of supply and demand structures
 - Market development
 - Barriers



Surveys

Energy advisers

- Supply-focused survey
- Survey among providers
- Ca. 14,000 addressees contacted
- Return: ca. 5%

Industrial and commercial companies

- Demand-focused survey
- Survey among 5,000 companies from the industry and tertiary sector
- Return ca. 6%

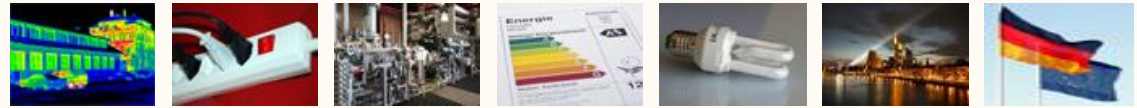
Surveys carried out to analyse the German EES market

- Supply-focused survey
- Survey among 300 Contracting providers + additional contacts from associations that represent energy providers
- Filled questionnaires received: 86

- Supply-focused survey
- Survey among 71 software providers
 - Return: ca. 18%

Contracting providers

Providers of energy management software

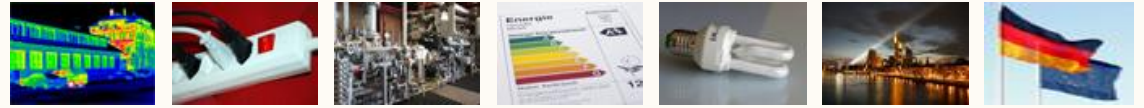


Market for Energy Efficiency Services in the „old“ NEEAP

5.	The market for energy-related services in Germany	85
5.1	“Contracting” energy service	85
5.2	Energy audits.....	88
5.3	Other energy services and energy efficiency measures.....	90
5.3.1	Energy-efficient building redevelopment and energy efficiency measures in SMEs.....	90
5.3.2	Energy Management.....	93
5.3.3	Measurement and metering services.....	94
5.3.4	Energy-efficient procurement	96
5.4	Energy and climate protection agencies	98
5.5	Market constraints and future challenges.....	98

Second NEEAP

„New“ NEEAP: Final approach on market chapter not decided yet, but results of the study will be major source of information → Main goal is to improve the chapter (quality and quantity of information)



For further questions....

michael.cemerin@bafa.bund.de
bfee.kontakt@bafa.bund.de

www.bfee-online.de
www.bfee.eu.de