



Measuring the energy efficiency industry – Political weight and the weight of policies

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ECEE Industrial Efficiency 2016, Berlin

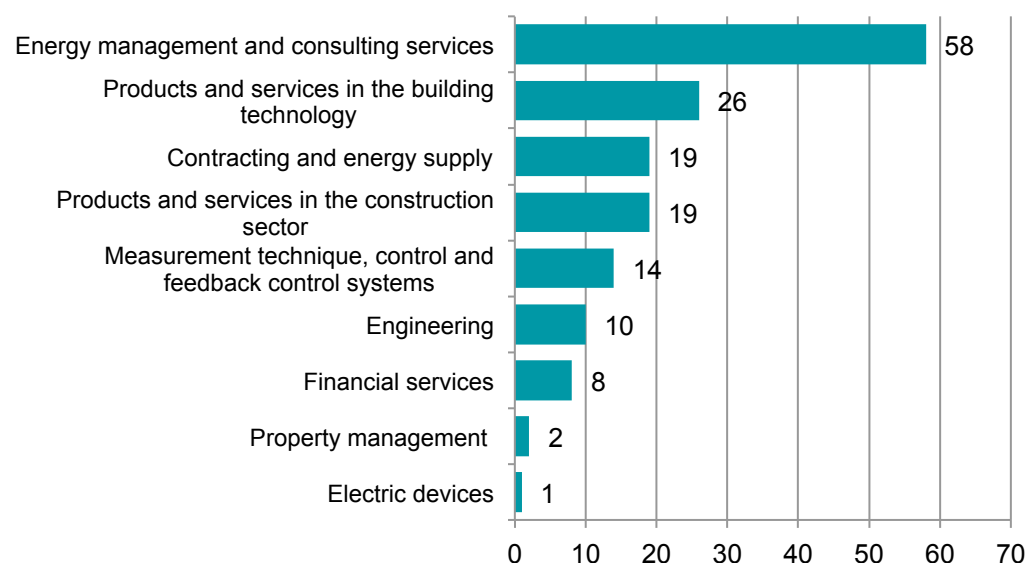
Members of DENEFF (04.08.2016)



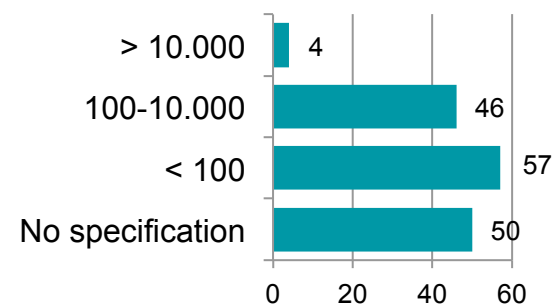
The Sector Monitor Energy Efficiency 2016

Composition of companies surveyed in the „Sector Monitor Energy Efficiency 2016“

Field of Activity

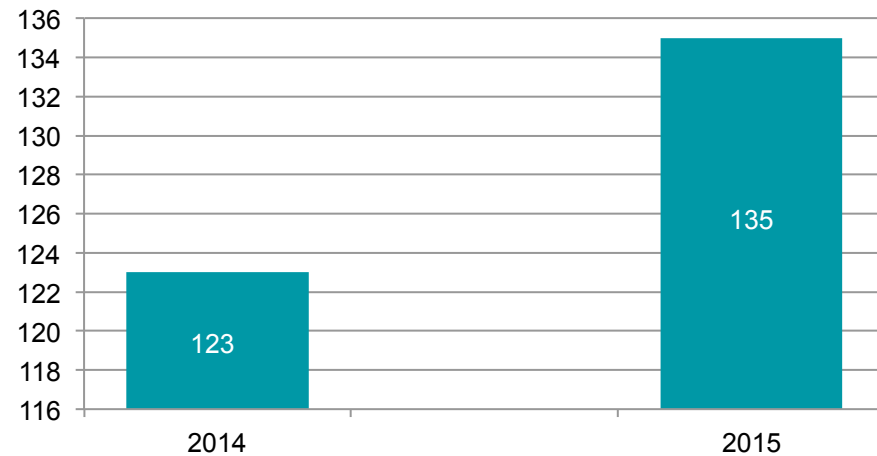


Number of Employees (total)

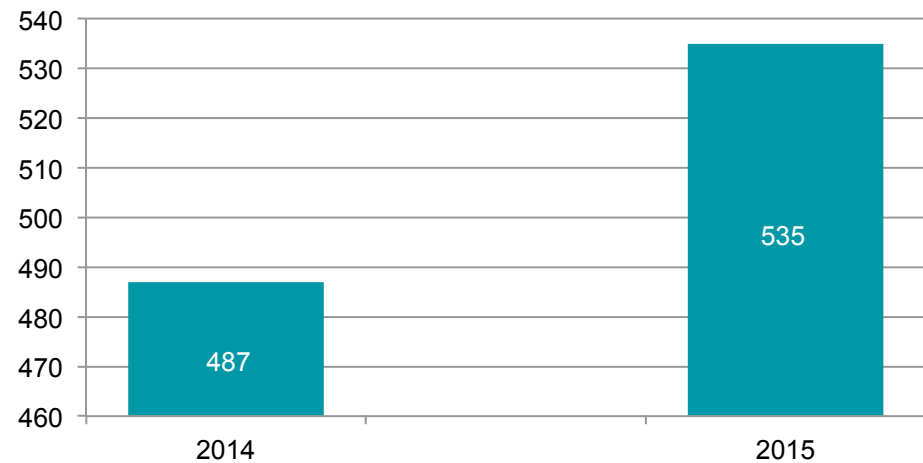


Turnover in the Field of Energy Efficiency is growing: 135 billion EUR in 2015

Turnover in the Energy Efficiency Sector in Germany
in billions (projected)



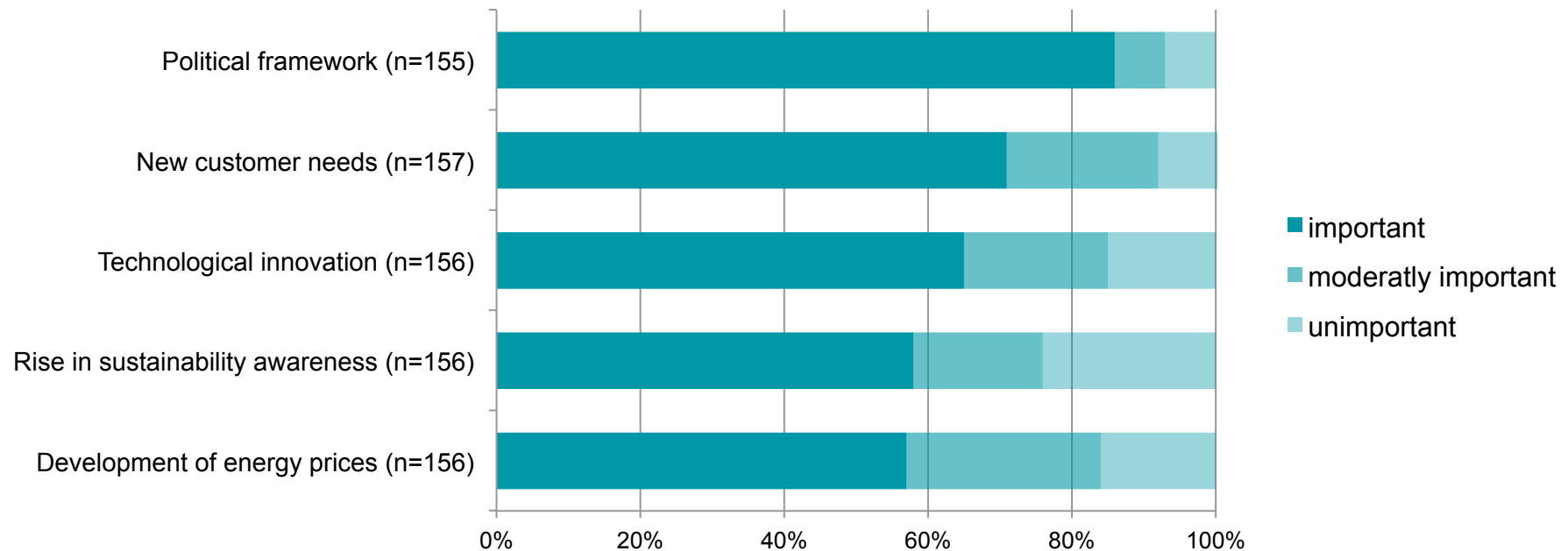
Employees in the Energy Efficiency Sector in thousand
(projected)



Trend reversal: Political Framework as the most important driver

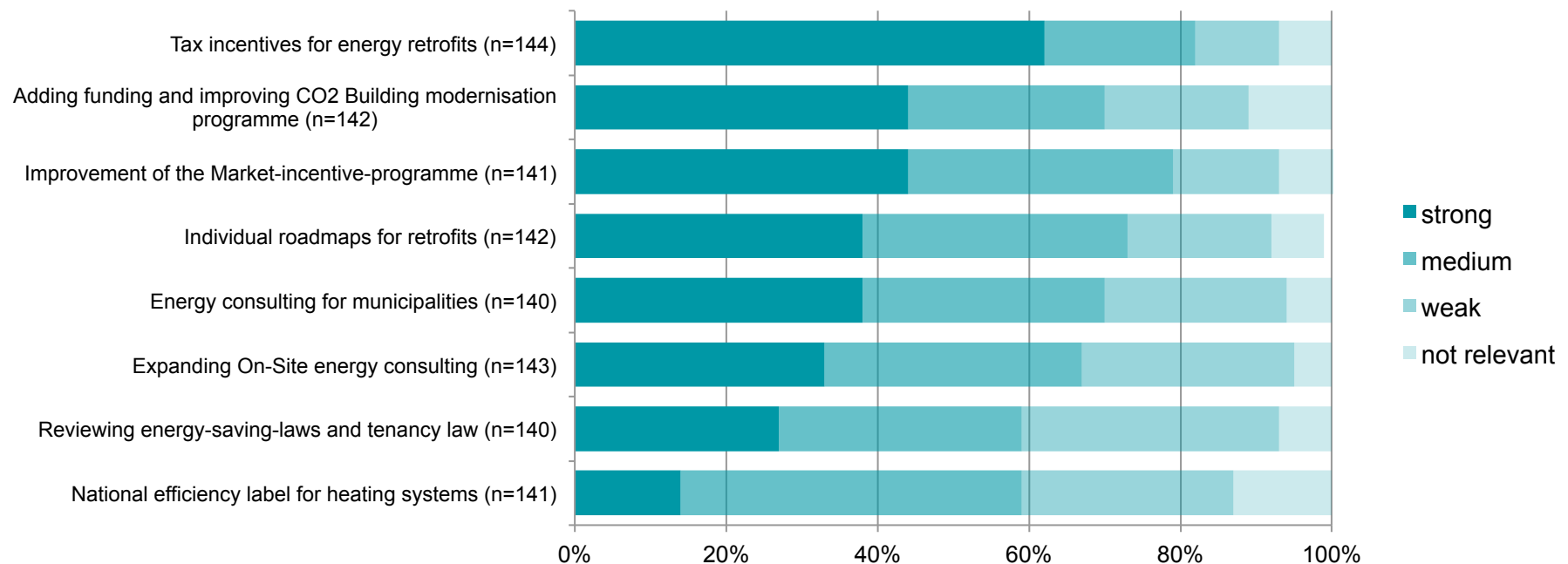
Factors providing the most important impulses for the sales market

Factors providing the most important impulses for the sales market



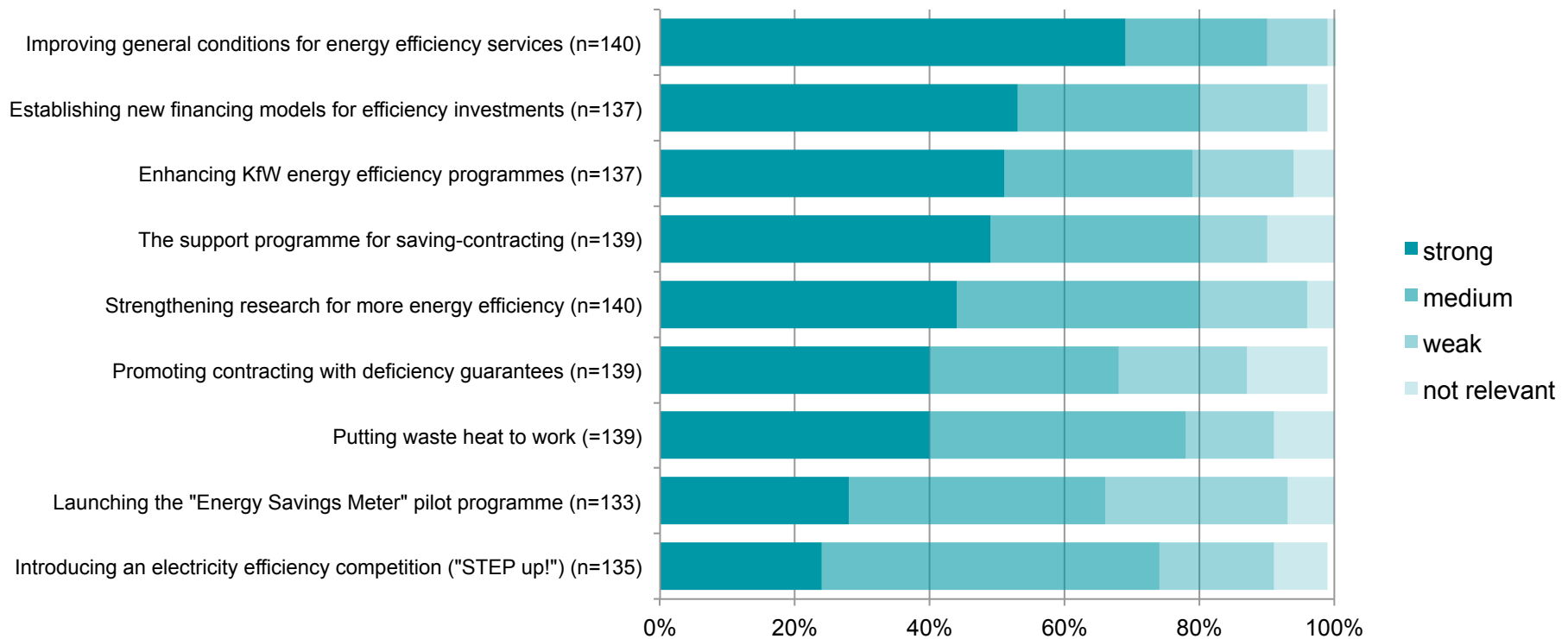
Importance of measures and instruments resulting from NAPE in the field of “Energy efficiency in buildings”

From which of the following planned or newly implemented political measures and instruments do you expect a strong impuse for your energy efficiency business?



Importance of measures and instruments in the NAPE in the field “Energy saving as an investment and business model”

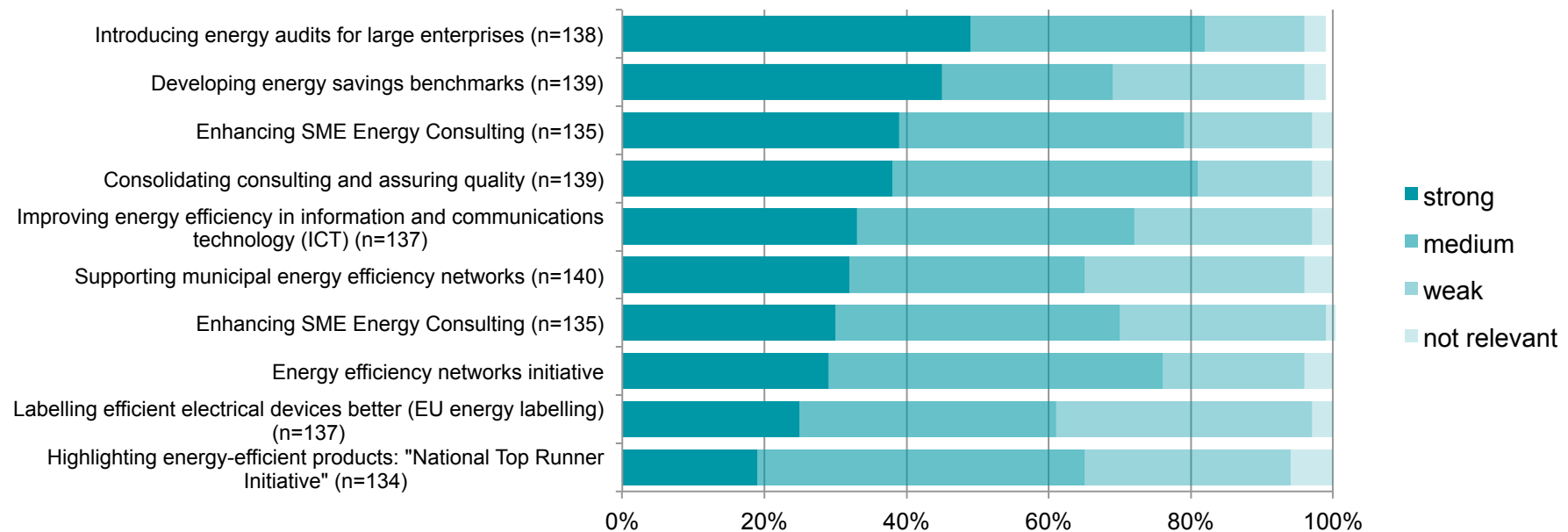
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Importance of measures and instruments in the NAPE in the field

“Individual responsibility for energy efficiency”

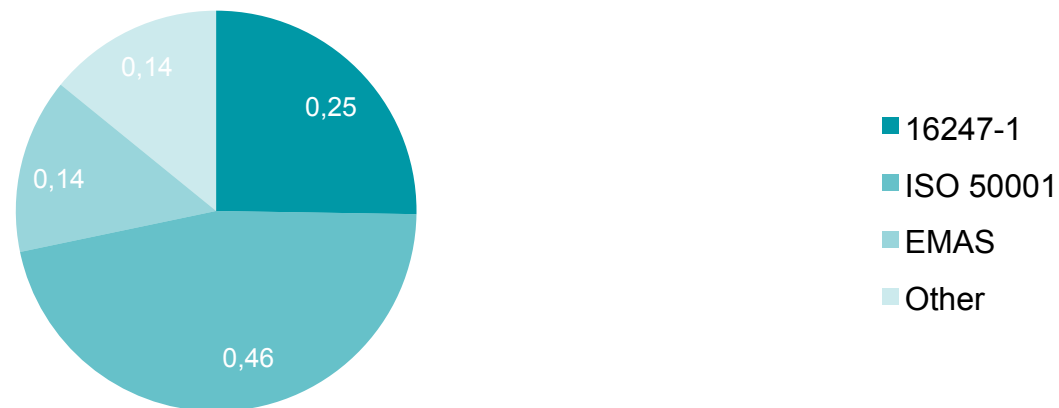
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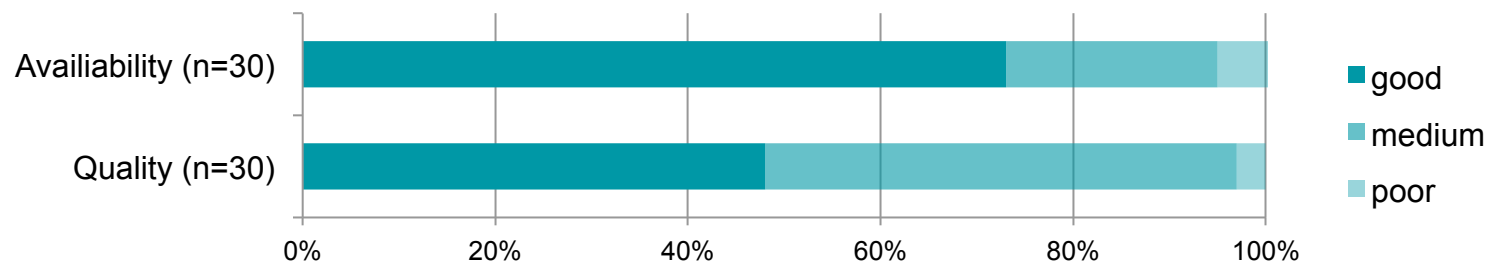
Very successful: Mandatory Energy Audits for large enterprises

Audit-systems introduced and availability and quality of providers

Which system did you introduce?

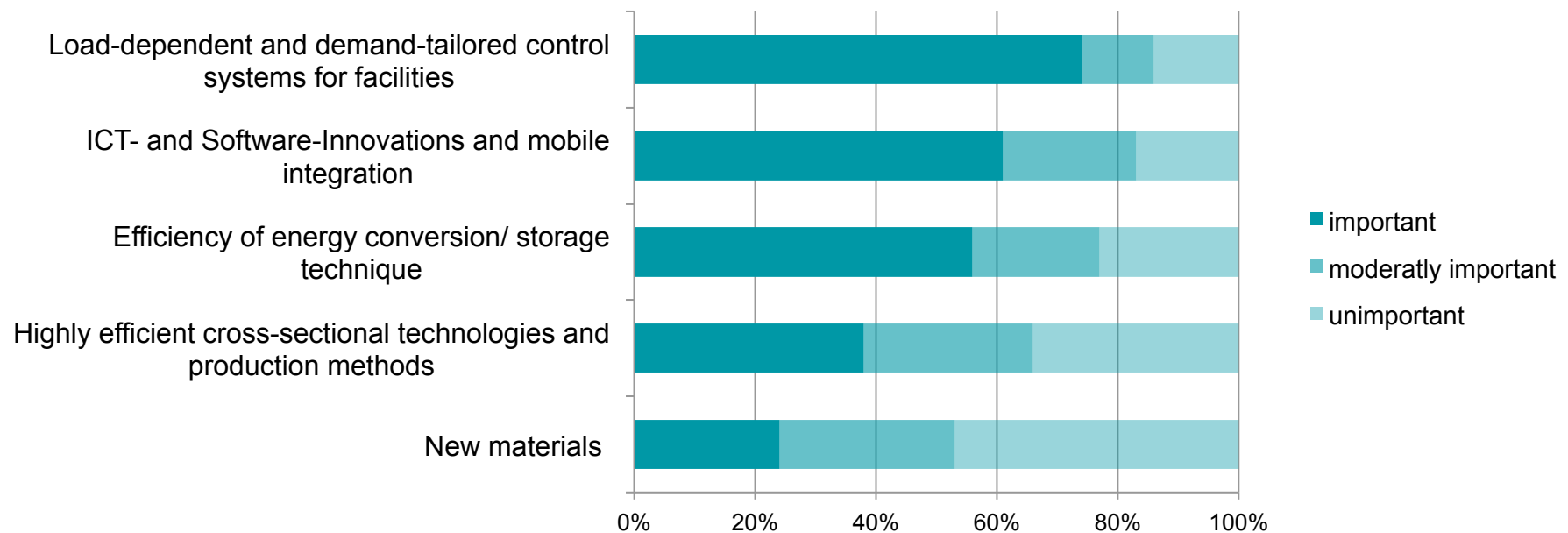


How do you rate the availability and quality of existing providers?



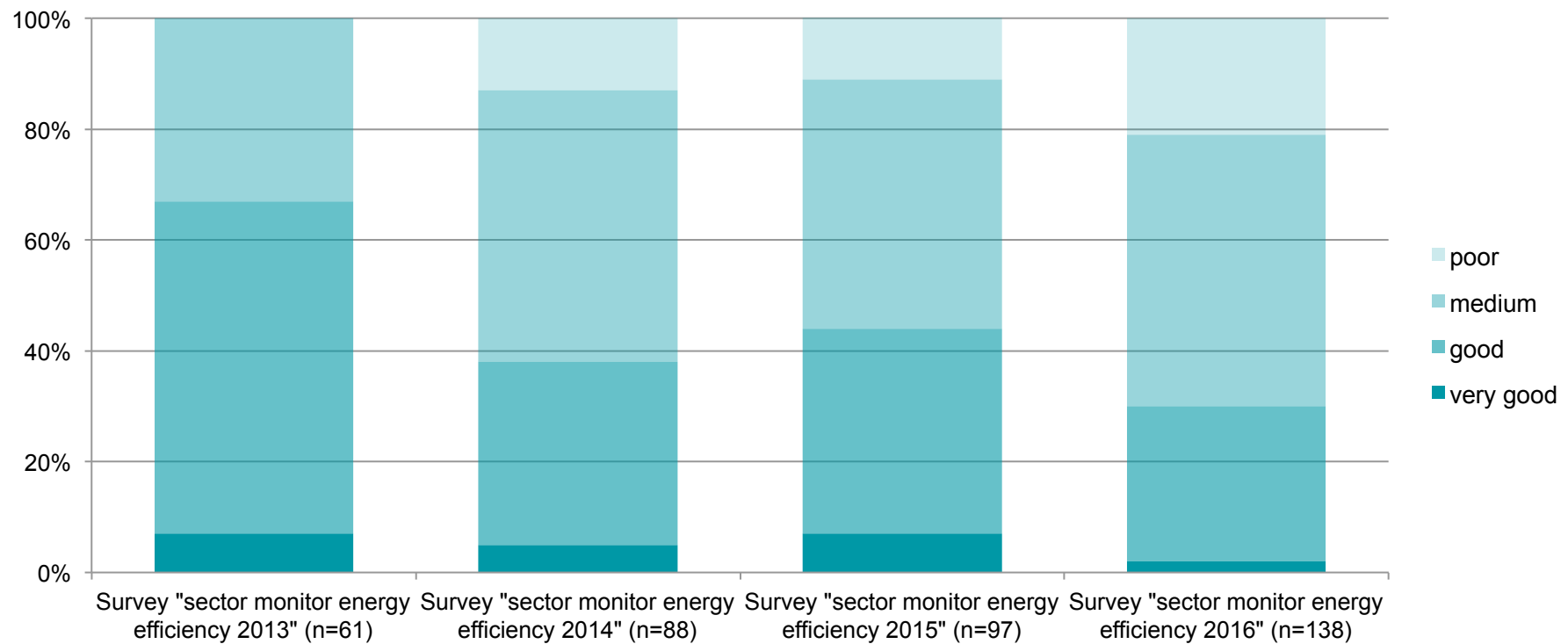
Significance of technical trends for the Energy Efficiency market

Which are the main technical trends that help you further develop your company's energy efficiency division?



Spirits are not being lighted despite positive developments

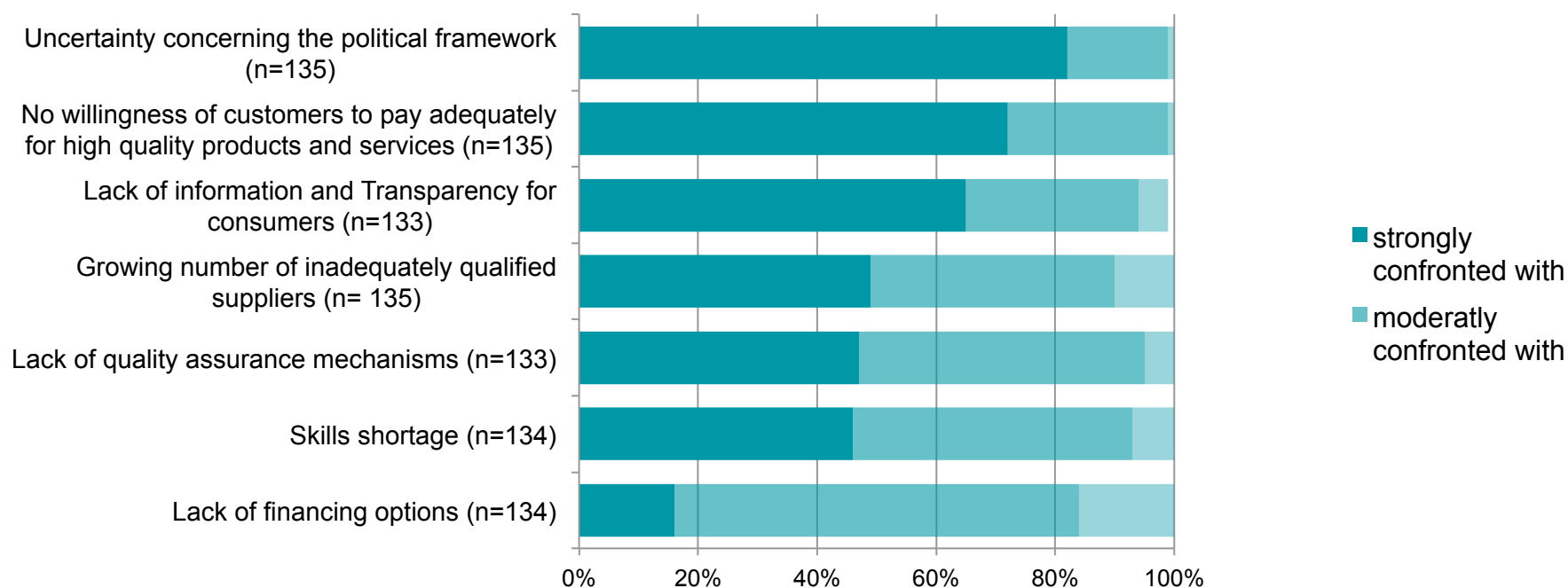
How is the mood in the energy efficiency market?



The biggest concern: An uncertain political framework

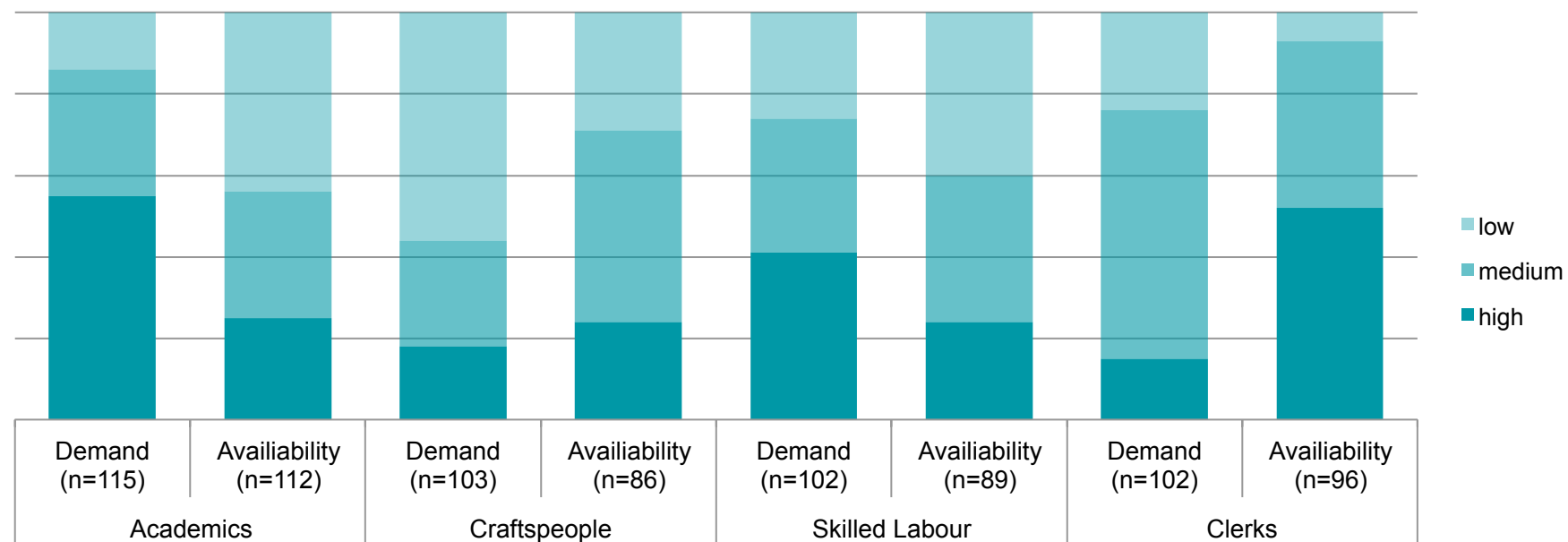
Future central difficulties of the Energy Efficiency Market

Wich are the main difficulties the energy efficiency market will have to face in the future?



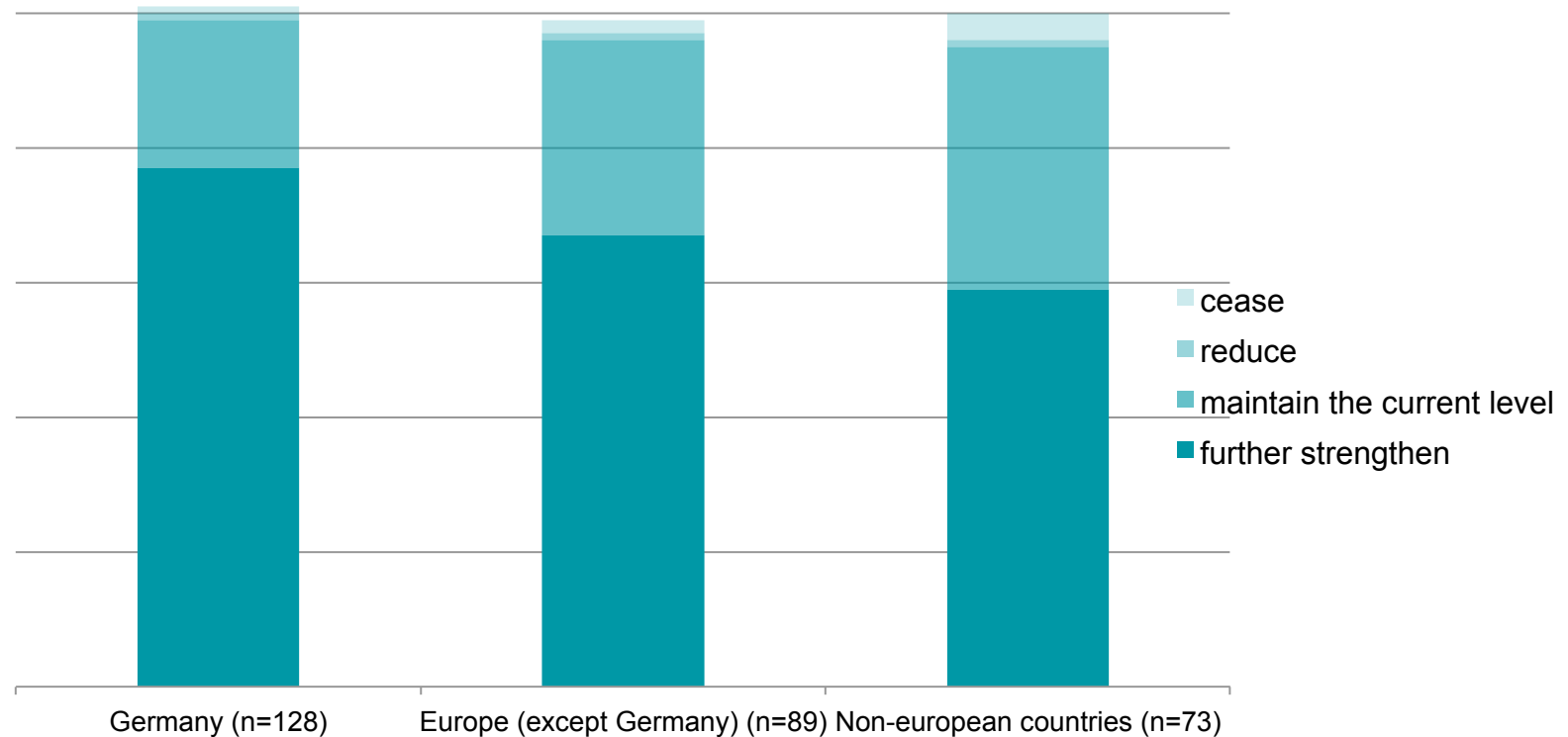
Demand and availability of qualified employees

How are demand and availability of qualified employees for your company in the field of energy efficiency?



Scheduled developments of the Energy Efficiency branch

We are planning to ... our activities in the field of energy efficiency



Conclusions

- Positive trend: The energy efficiency market continues to grow, as well as competition from new companies.
- Sinking energy prices and skills shortage are possible obstacles to growth.
- Digitisation is the most important driver concerning technical trends and aggravates the need for skilled labour of the sector.
- For the first time, the political framework was identified to be the most important driver. Companies desire a stable, favourable political framework.

