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# The German market for energy efficiency services

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ECEEE Summer Study, May 30th 2017

<http://www.bfee-online.de/>



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## Framework 2016-survey

- 100 in depth expert interviews
- CATI interviews of 3000 private households of which
  - 1500 tenants and
  - 1500 home-owners
- CATI interviews of 3000 SMEs; composition representative for Germany
  - by sector (define clusters) and
  - region
- 1480 providers of energy consultancy answered online questionnaire
- CATI interviews of 210 energy efficiency services providers



TNS Emnid

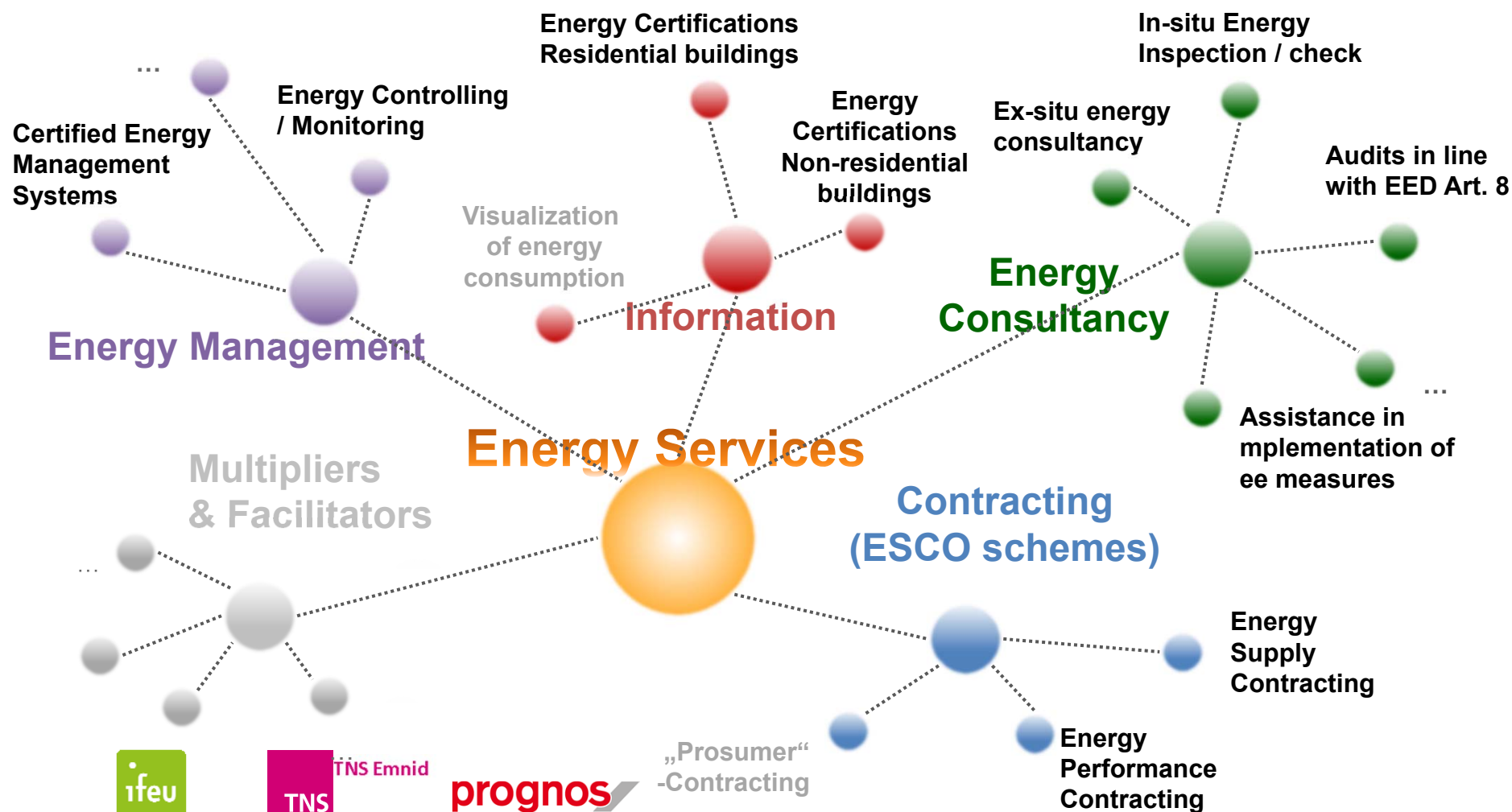
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## Products 2016-survey





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## Key Findings I

- Market has expanded between 2012 and 2015
- Total market volume reached about 9.8bn EUR in 2015
  - Energy contracting constitutes largest share with 8.4bn EUR (mostly supply contracting)
  - Energy consulting services about 1.1bn EUR
  - Energy certificates for buildings about 135mn EUR
  - Energy management about 210mn EUR
- Further dynamic growth is expected



## Key Findings II

- Increasing prices for energy audits / energy consultancies
  - for SMEs
    - higher specialization of auditors in the commercial sector
    - growing demand due to Art. 8
  - for private households
    - higher awareness of home-owners (inter alia due to building certification)
    - Increasing complexity of residential buildings
- Energy management sector has grown quickly
  - due to regulatory framework
  - digitization lowers transaction cost
- Contracting market has grown but slower than previously
  - municipal utilities were more active in 2015 than in 2012



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## Key Findings III

- high relevance of energy efficiency for households (7.6/10) and SMEs (5.7/10)
- Energy consultancy single energy efficiency service most used by households
  - (but only) 37% of homeowners has had energy consultancy...
- 44% of SMEs have used energy efficiency services before
  - 69% of those with turnover of 10mn to 50mn EUR
  - 72% of companies in food trade
- lowering energy costs is the key motivation to implement energy efficiency measures of private households and SMEs alike

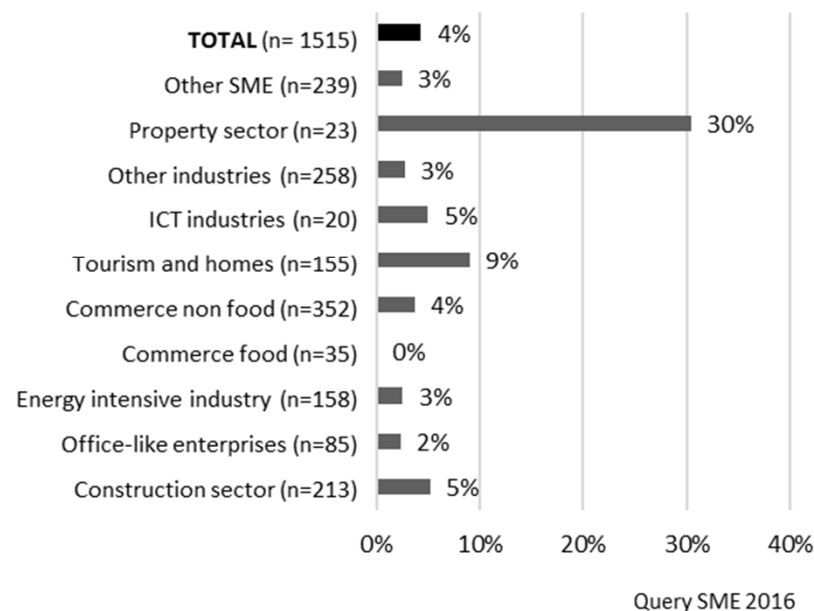


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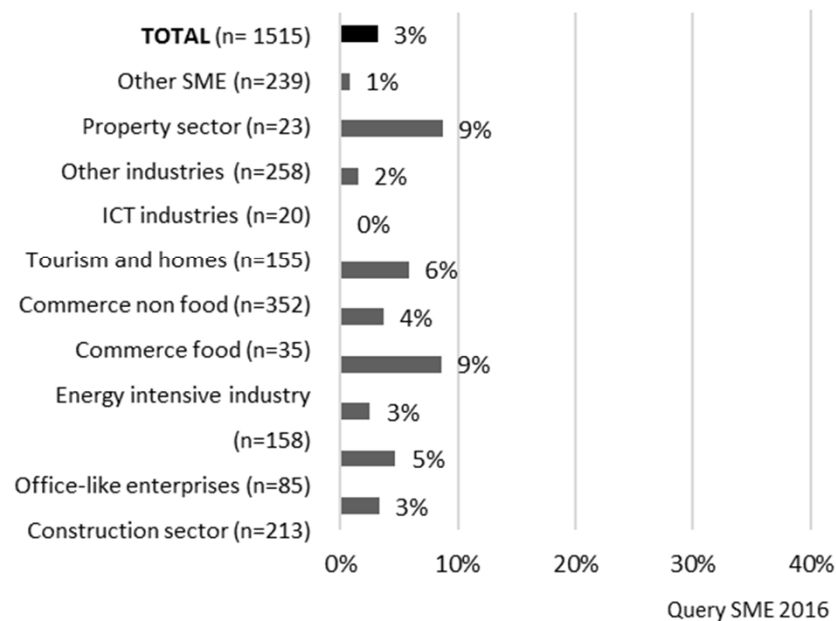


## A closer look at contracting...

Have you been using ESC over the last 3 years?



Have you been using EPC over the last 3 years?





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## Challenges & Solutions

- Current project to gather data for 2016 (market indicators) / 2017 (assessments)
- Answers differed sharply from expectations → Definitions sharpened
- Some answers difficult to interpret → Questionnaires more coherent and clear (e.g. energy management services, contracting)
- Universe of EES suppliers unknown → Concept for survey of EES suppliers overhauled





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Backup



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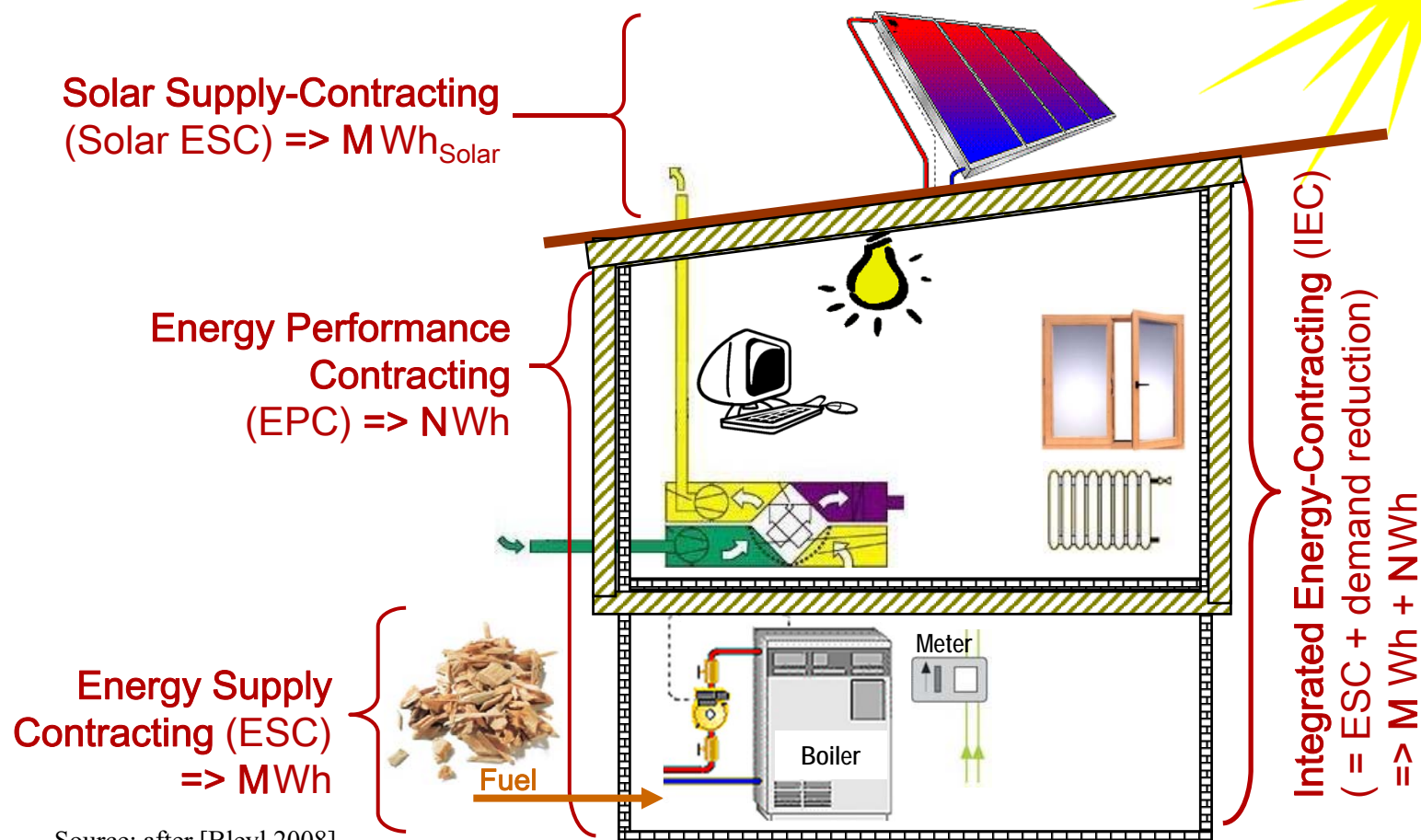
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## Efficiency Potentials of different Energy-Contracting Models



Source: after [Bleyl 2008]