



Federal Office  
for Economic Affairs  
and Export Control



# The German EPC market

## Results from the 2018 market survey

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*CA EED, WG 4.3 – Successful legislative frameworks for EPCs and other financial options*

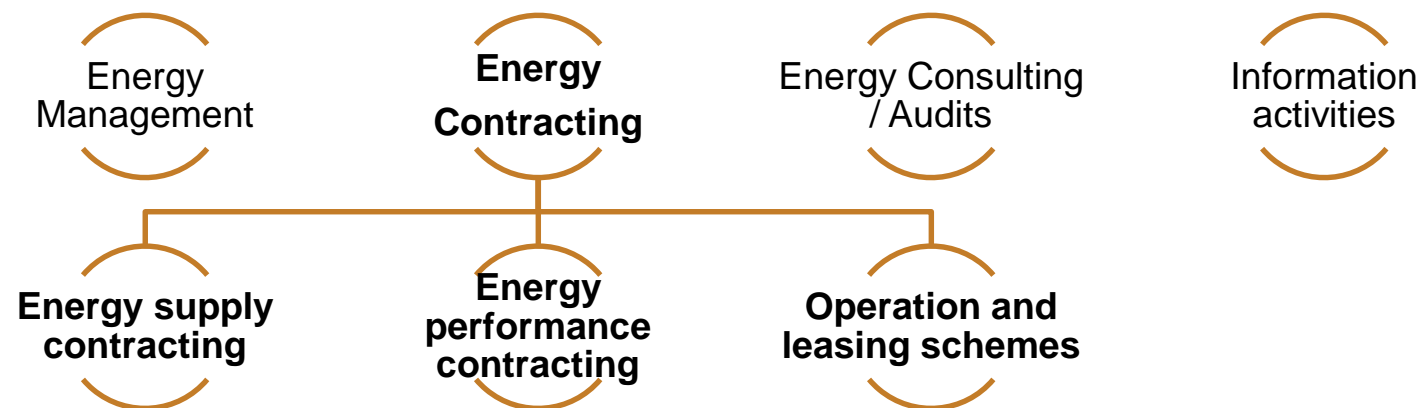
*Helsinki, 19. March 2019*

<http://www.bafa.de/>

## 1. The impact of current EPC programs

### Study design of survey on the German energy service market

- Annual study since 2016 (telephone and online survey)
- Analyzed services:

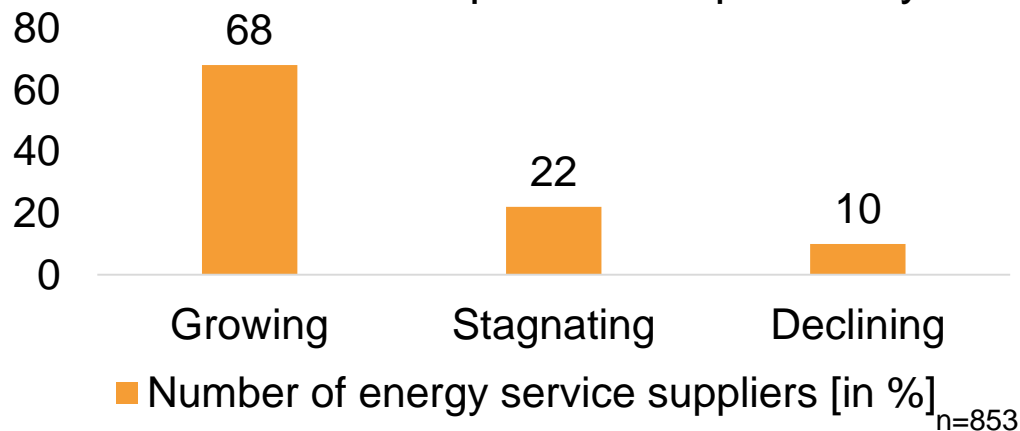


- Demand side: 3,000 private households, 2,750 companies, 470 interviews with public sector
- Supply side: 210 suppliers via telephone, 1,250 suppliers via online questionnaires
- Results will be available in English on <http://www.bfee-online.de/BfEE/DE/Energiedienstleistungen/Marktkennzahlen>

## 1. The impact of current EPC programs

### The German EPC market

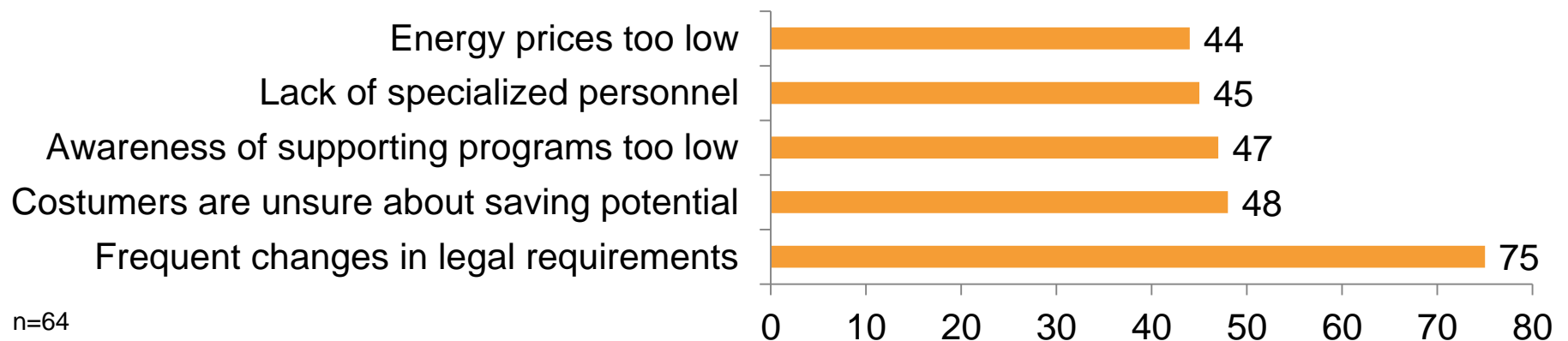
- Estimated market volume in 2017: ~ 7.9 bn Euro (EPC, ESC, Other)
- Characteristics of supply
  - Approximately 550 energy contracting suppliers → EPC only a small share
  - EPC suppliers are mostly energy utilities or specialized contracting businesses
- Positive EPC market development is expected by most ESCOs



## 1. The impact of current EPC programs

### Motivation and barriers

- Top 5 barriers on energy contracting (in %)



- Top 3 Reasons for EPC

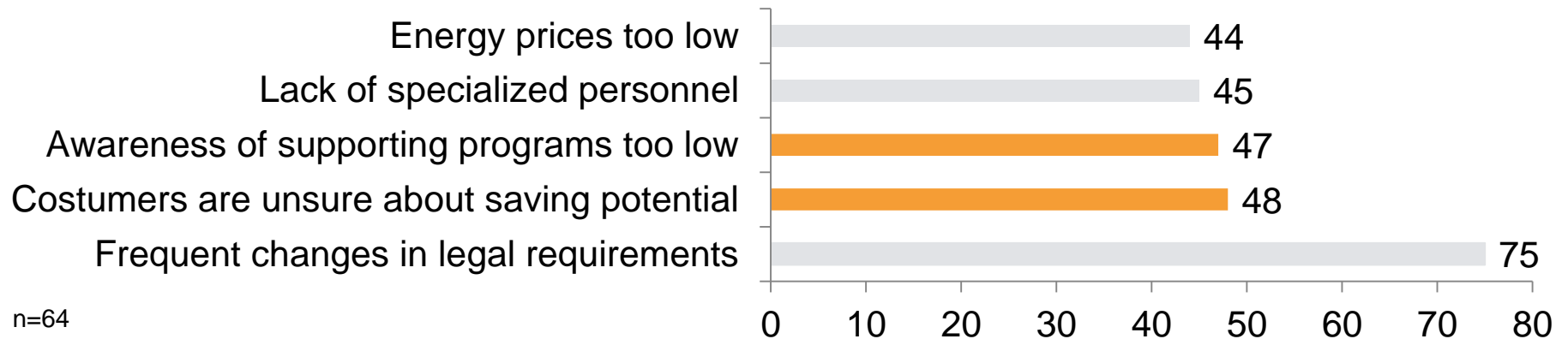
Public sector (n=26)	Businesses (n=275)
Reduction of energy use (88 %)	Reduction of energy use (83 %)
Strategic decision (65 %)	Gain control over energy cost (74 %)
Gain control over energy cost (65 %)	Strategic decision (66 %)



# 1. The impact of current EPC programs

## Motivation and barriers

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## 2. What were the critical success factors?

### Success factors in place or to be addressed in future

- Project management
  - Several **tools on EPC** available ( → model contracts, calculation tools, guidance documents)
  - Establishment of **regional competence centers** is ongoing (→ Federal-state dialogue on EPC)
  - **IT tool** to assess economic viability of EPC vs. own-implementation
- Market Promotion, Awareness & Understanding
  - Successful Projects with case studies → **Pilot projects** in the public sector in planning
  - Public funding for **contracting check** for businesses and municipalities included into energy consultancy support programme (assesses whether EPC is appropriate or not, supposed to raise awareness of programme)



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Thank you for your attention



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