



ESCO industries in Europe by 2015

Market volumes, competition and critical success factors

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- Review of the country-specific legal circumstances in detail
- Analysis of structure and volume of energy services market per country
- Market development per country
- Competition analysis and profiles of main market actors
- Identification of requirements of main target groups (e.g. industry, public services)

The European Union target to save 20 percent of the energy use by 2020 requires large investments in energy efficiency over the next couple of years. Due to the fact that Energy Service Companies (ESCOs) are important agents to promote energy efficiency improvements and renewable energy sources European Commission and the Member States of the European Union have promoted a number of policy initiatives to foster the Energy Services industry in European countries. While the directives have been adopted mostly in national law, the energy service market in the European countries suffers strongly from a lack of enforcement and different levels of support offered to ESCOs by national and regional energy authorities. Further reasons for different market development in European countries are local market structures and rules and variation in the definitions, roles and activities of ESCOs.

In the premier league of ESCO countries in Europe are – concerning market penetration – Germany, United Kingdom, France and Spain. In some countries like Greece and Ireland only a few companies have recently started to operate. Some other countries have also seen a spectacular increase (yet starting on a rather low level) in ESCO activity in the last few years. A good example in this respect is Sweden. A focused

and comprehensive strategy that was designed for the country-specific circumstances has led to a significant market rise. Also, Czech Republic and Hungary have significantly strengthened the ESCO industry.

The present study provides an overview of the development of Energy Services industries across Europe (see map on left for countries). Based on the status quo, the study describes the future development of the Energy Services market up until the year 2015.

Additionally, the study scrutinizes further aspects of the Energy Service market in the respective countries. The conditions in the countries are presented in detailed country profiles. The chapters on the status quo and the market competition offer an exhaustive description of the current situation. By reading the chapters on trends, opportunities and risks as well as strategic options, one can get a feeling of the specific developments in the countries and tools to gain profit from and which critical success factors must be met.

The results of the study stem from desk research and qualitative interviews with the relevant market actors (main target groups and ESCOs) and experts.



Selection of considered European countries (dyed dark-blue)

ESCO industries in Europe by 2015

Planned content of the study

Aims and benefits of the study

On the basis of current developments and discussions, the study demonstrates and analyses the specific situation in European countries in more detail and shows the future development of energy service market up until 2015 in terms of different scenarios.

Alongside the quantitative analysis of the market, the market will be portrayed via a qualitative depiction of e.g. competition intensity, opportunities and risks, requirements of target groups etc. Based on these data and forecasts, the study enables its readers to assess the plausibility of their own strategies and market data. Furthermore, the analysis of trends, opportunities and risks within the market contributes towards optimum market positioning in decisions pertaining to strategy and investment.

Methodology

trend:research implements a variety of field and desk research methods. Alongside extensive intranet and internet database analyses (including journals, publications, conferences, company reports, etc.), the market potential study comprises ca. 280 structured interviews with the following target groups in each country:

- Manufacturing industry
- Real estate and housing industry
- Public sector: municipalities and public facilities
- Healthcare sector: hospitals and care facilities
- ESCOs
- Associations
- Other experts

The analysis of field and desk research data leads to reliable conclusions regarding markets, trends, competition and dealing with the options within the energy service market. By means of the multivariate Trend-Impact-Analysis™, data and information are quantified and structured into a knowledge database. This is then used to build scenarios and deduce accurate market predictions.

For whom is the study intended?

The market potential study is aimed at all stakeholders within the international market of energy services, thus providing a fundamental view of all data, discussions and market movements relevant to this market.

By means of detailed analyses of energy services, the study offers an overview for Contractors, energy providers and service providers.

The study is aimed at management, marketing and distribution people, strategic planners, contractors etc. committee chairs, management boards, industrial strategy developers, marketing and sales representatives.

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