

Brussels, 18th January 2018

## RESEARCH LED BY QUALITEE PROJECT IS SHAPING FUTURE QUALITY ASSURANCE FOR ENERGY EFFICIENCY SERVICES

The QualitEE project recently published the results of an EU-wide survey that has investigated the energy efficiency services market in 15 countries. The results will **shape the development of quality criteria and assurance schemes for energy efficiency services**. These are the main outputs of the QualitEE project, which aim to increase trust and investment in energy efficiency services.

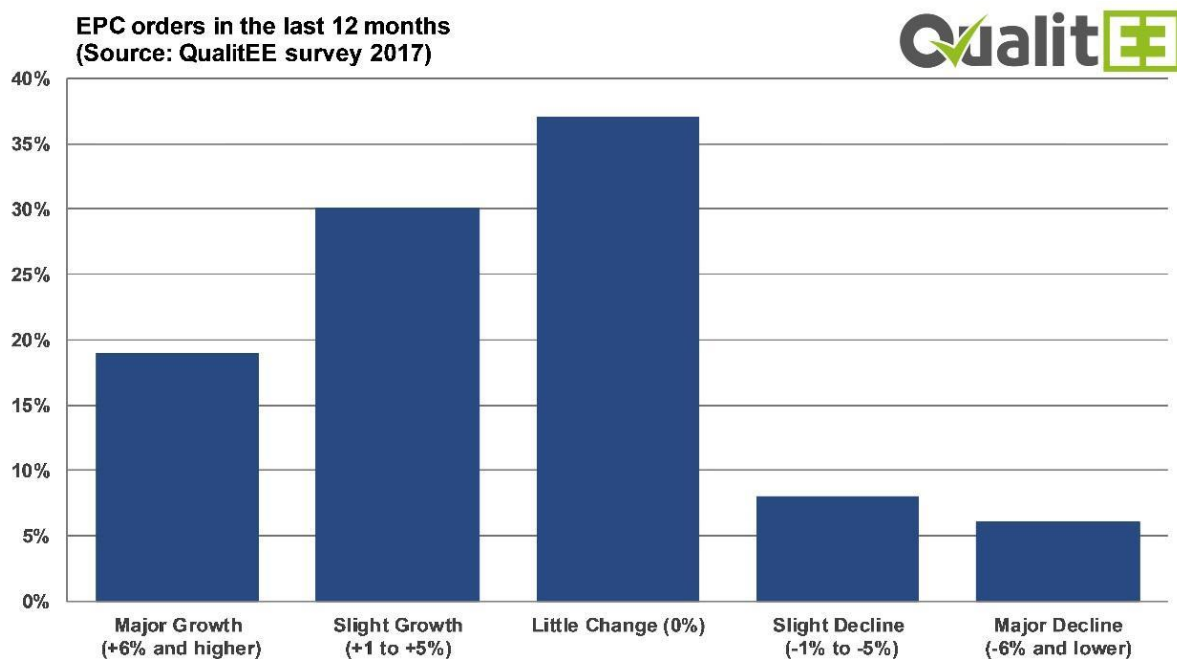
The extensive market research, undertaken by the QualitEE consortium, resulted from **detailed surveys of 109 providers of energy efficiency services and 79 facilitators**. The survey focused on understanding the current state of the market for the key energy efficiency services of energy performance contracting (EPC) and energy supply contracting (ESC), and in particular the financing and quality aspects.

The QualitEE project, funded by EU's Horizon 2020 programme, builds upon a previous initiative, *Transparens*, which established the [European Code of Conduct for Energy Performance Contracting](#) in 2014. These new results allow for trend analysis via comparison with previous *Transparens* surveys conducted in 2013 and 2015. The full results can be explored through an [interactive online navigation tool on the project website](#).

### Key findings from the QualitEE consortium's research

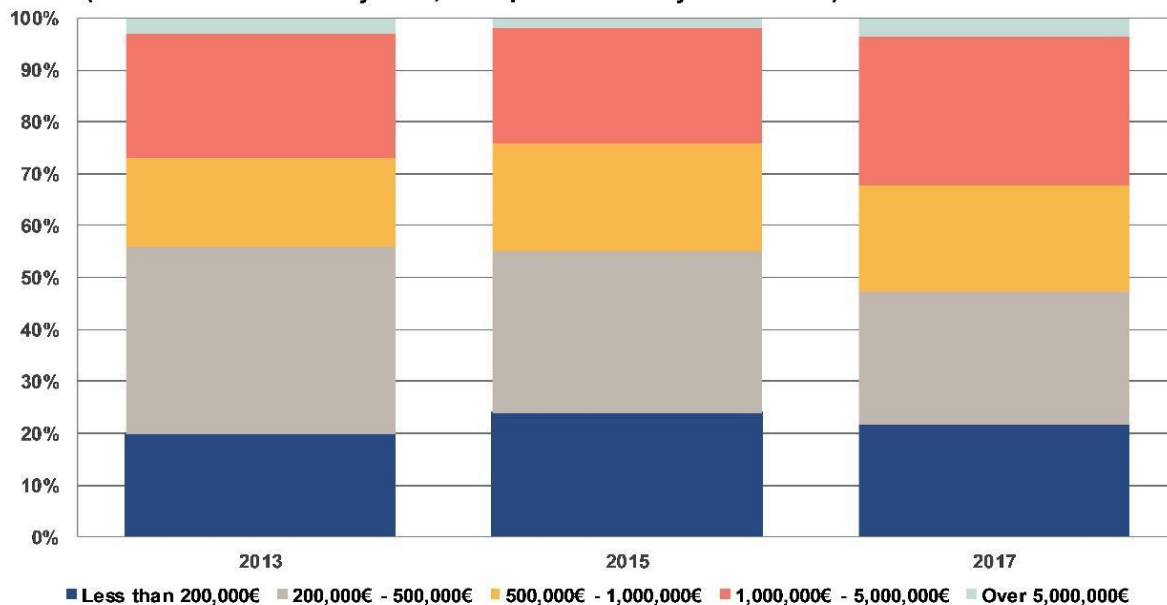
#### The Market

- ✔ 49% of all respondents reported that their EPC orders had seen growth over the last 12 months



- ✔ 32% of respondents reported a typical project capital value of over 1,000,000 Euros, up from 25% in 2015 and 27% in 2013

**What is the most common overall value (investment outlay) of the projects you are involved in?**  
 (Source: QualitEE survey 2017, Transparense Survey 2013 & 2015)



- ✔ However, the majority of respondents still report smaller project sizes under 1,000,000 Euros. Projects this size often struggle to access affordable finance.

Development of quality criteria under the QualitEE project is expected to drive standardisation, and facilitate bundling of projects, to overcome this barrier.

- ✔ The **energy savings guarantee** (selected by 58% of respondents) and the opportunity to tackle a **pressure to reduce costs** (47%) are seen as key drivers for the EPC model
- ✔ **Complexity of the concept / lack of information** (59%) and **lack of trust** in the ESCO industry (53%) are seen to be holding business development back
- ✔ The **ESC market** in the last 12 months was reported to be **more stagnant**; only 39% of respondents reported order growth and 47% identified little change
- ✔ **40%** of respondents reported a **lack of trust in providers** of energy efficiency services in the majority of cases, 34% reported a lack of trust in about half of all cases.

### Improving Service Quality

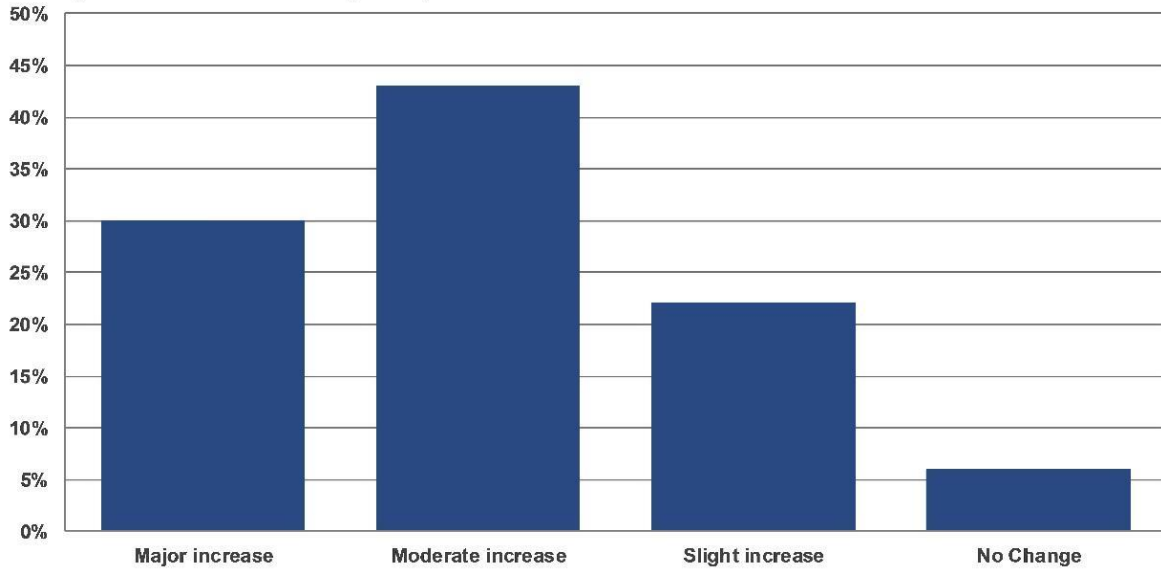
- ✔ Respondents highlighted the **key quality determinants** of EPC projects as:
  - preliminary technical-economic analysis / energy audit
  - measurement and verification of savings
  - achieving the expected level of savings

These also ranked highly as areas in need of improvement, along with ‘transparency and completeness of contractual stipulations’.

✔ In ESC projects, 71 % of respondents identified preliminary technical-economic analysis / energy audit as a key quality determinant as well as the area where most improvement is needed

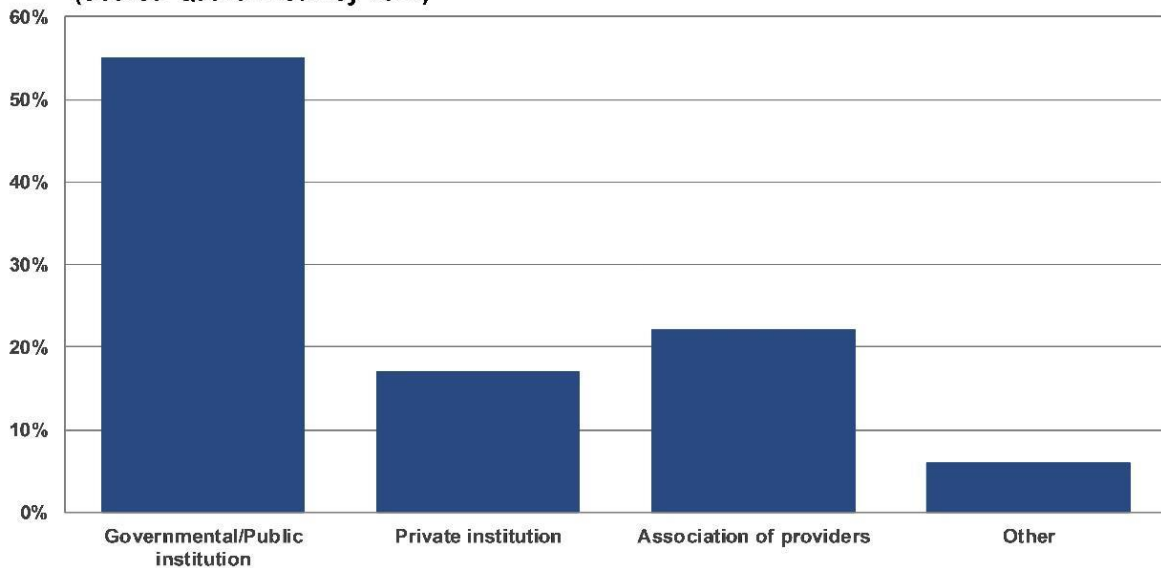
✔ 82% of those surveyed said customer trust in energy efficiency services projects would be increased if a quality assurance scheme was implemented

**To what extent would a quality assurance scheme increase client trust in energy efficiency services and providers?**  
(Source: QualitEE survey 2017)



✔ 55% felt that a Governmental or Public Institution would be the most respected body to back a quality assurance label or certification for energy efficiency services

**Which would be the most respected body to issue a quality assurance label or certification for energy efficiency services in your country?**  
(Source: QualitEE survey 2017)



By responding to these findings through the development of quality criteria and assurance schemes, the QualitEE project aims to drive standardization and quality improvement of energy efficiency services, thereby improving trust in service providers and increasing investment. The project runs from 2017 to 2020 and initially focuses on the drafting of European quality criteria and verification procedures, from which national adaptations can be made. This will involve an extensive **stakeholder consultation process**, including European level discussion workshops in Brussels on 22<sup>nd</sup> March 2018. You can register to the [technical workshop here](#) and to the [financial workshop here](#).

In addition, the consortium will be running **training seminars** intended to increase skills and knowledge of stakeholders, as well as **24 pilot projects** that will test the application of quality criteria and assurance processes. By the end of the project, it is aimed that at least eight European countries will have ‘kick started’ quality assurance schemes, from which best practice business models will be published to allow other countries to follow suit.

The QualitEE consortium is being led by Austrian energy efficiency services consultancy e7 Energie Markt Analyse GmbH, and driven at a European level by leading trade association, EFIEES (European Federation of Intelligent Energy Efficiency Services). In total **12 partner organizations will cover 18 European countries**; Austria, Belgium, Bulgaria, Czech Republic, France, FYROM, Germany, Greece, Italy, Latvia, the Netherlands, Portugal, Romania, Serbia, Slovakia, Slovenia, Spain and the UK.

The project has secured **support from over 50 stakeholder organizations**; major financial institutions, government bodies, trade associations and certification bodies, and receives input from a European Advisory Board, which includes standardization experts from CEN/CENELEC (European Committee for Standardization), NEN (Standardization Institute of the Netherlands), financial experts from SUSI partners and IFC (World Bank Group) and energy services experts from EFIEES, eu.ESCO and Econoler.

For more information, to register for regular email updates with information on how to participate in the project activities, and to view the full market research findings, please visit: <http://www.qualitee.eu>

## Note for editors

The QualitEE energy efficiency services survey was conducted between July and October 2017 and completed by 188 respondents from 15 European Countries (109 providers and 79 facilitators of energy efficiency services). The questions focussed on understanding the current state of the market for the key energy efficiency services; energy performance contracting (EPC) and energy supply contracting (ESC).

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## High Quality Chart Images

Available at [https://drive.google.com/open?id=1-nlojPJLJKicR\\_FxG81x8qorhkWZ23h](https://drive.google.com/open?id=1-nlojPJLJKicR_FxG81x8qorhkWZ23h)

## About EFIEES

The purpose of the European Federation of Intelligent Energy Efficiency Services is to promote the activities of Energy Efficiency Services Companies (EESCs) in the European Union. EESCs design and implement practical measures to improve the energy efficiency of their customers by means of long-term contracts. Their objective is to optimise the energy management of end-users.

## About e7 Energie Markt Analyse GmbH

e7 is a private research and consulting company specialised in the energy efficiency and renewable energy sector. Founded in July 2007, the company is based in Vienna, Austria. In its work, e7 puts a focus on questions regarding energy efficiency, renewable energies and climate change. [www.e-sieben.at](http://www.e-sieben.at)

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