



Minutes of 1st workshop

Slovenia
English language

October 2015

Public



Co-funded by European Union

Author

Jozef Stefan Institute - Energy Efficiency Centre
Jamova 39, 1000 Ljubljana
polona.lah@ijs.si
damir.stanicic@ijs.si

This document has been elaborated within the
Energy Performance Contracting Plus (EPC+)
project and is available on the project website.

www.epcplus.org

Deliverable 2.06

This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No. 649666.

The content here included reflects only the authors' views and the EASME is not responsible for any use that may be made of the information it contains.

Content

1 st workshop: About the EPC+ project and market assessment	4
a) General information	4
b) The agenda of the workshop.....	4
c) Questions to be answered	5
Annex: 1 st workshop	7
Invitation	7
Agenda.....	8
Pictures	9
List of participants and signature	10
Minutes in national language:	10

1st workshop: About the EPC+ project and market assessment

a) General information

Title of the event: Partnerships for EPC - Workshop of potential SPIN partners

Organized by: Jozef Stefan Institute – Energy Efficiency Centre

Date: 1st of October 2015

Duration: 9:30 – 12:00

Location: Reaktorski center Podgorica, Ljubljana

Invited SPIN partners: the invitation to the Workshop was sent to 35 companies that provide energy efficient product and services, 11 of them responded to the invitation, 10 of them attended the meeting:

List of participant - Confidential.

b) The agenda of the workshop

- Presentation of EPC+ project, presentation of the idea of partnership of SMEs for EPC - SPIN setting up,
- Presentation of SMEs – members of SPIN,
- Market assessment and assessment of possibilities of cooperation between SMEs,
- Identification of business model, energy efficient technologies, potential clients,
- End of the workshop and following steps.

c) Questions to be answered

- **Assessment of your potential cooperation fields**

The ESCO market in Slovenia is moderately developed. There are several successfully developed contracting project based on energy performance. Most of the projects are developed in industry sector and some in public sector. There is no EPC in the SME market. This market segment is currently undeveloped. ESCO showed interest for deeper cooperation with other SMEs as their subcontractors. ESCOs were presented with the idea of SPIN and their role as principal within the established SPIN since it is the easiest way to start up the EPC services in SMEs segment without substantial investments. All have steady SMEs clients. Two ESCOs showed specific interest since they both are obliged to achieve savings as obligated parties under national energy efficiency obligation schemes. Consequently they are looking for new investment opportunities required under the scheme.

During the meetings several potential cooperation fields were identified: lightning, biomass and natural gas boilers, HVAC systems, measuring systems, compressed air, windows and envelope renovation...

Providers of equipment and energy efficiency services support the incentive concerning cooperation and networking of providers of equipment and energy efficiency services (an energy service product development and carrying out of measures itself). They stress that there is no long term national strategy, as a basis for planning of their own development. Everybody notices the decline of investments, as there are currently no subsidies available for the industry. They find energy contracting (as public private partnership) very difficult due to the legislation. They would need a platform with all the information and guidelines regarding procedures could be found.

ESCOs support the idea of cooperation and networking. Their main interest is participation as finance providers to the project developed by SPINS partnerships.

ESCOs highlight the problem of the market itself / market analysis and searching for clients. Entering into the SMEs market has different rules of appearance than a public sector. This market is more difficult, preparation of projects is longer, and negotiations are more difficult. Other companies / providers of equipment also noticed, that in the private sector a decrease of projects happened, because there are no new tenders for subsidies, nevertheless the measures are economically efficient.

The electricity market operator shows interest in cooperation in the initiative of SPIN development. They created a portal for energy contracting, where cases of best practice will be published and promoted. Currently they cooperate in the carrying out of three pilot projects of renovation of multi-apartment buildings.

IJS EEC, on the basis of the received information from participants of the meeting, will in following weeks conduct several bilateral meeting between ESCOs and afterwards will propose a rough concept of partnership:

ESCOs as finance providers and principals, providers of energy efficient products and services – appear with their products and solutions, the electricity market operator takes over the promotion and integration of the SPINs into their platform and creates a base of energy products and services providers, JSI EEC acts as market facilitator.

ESCOs draw attention to the problem when establishing partnerships and carrying out of common projects: risk sharing, profit sharing, measuring of savings of individual measures (difficulties especially with heat).

Further steps:

On the basis of the acquired information of this meeting IJS EEC will continue with bilateral meetings with interested partners. Further steps will be taken for the development of a business model of energy contracting for established SPIN. IJS EEC carries out further activities of networking and marketing, prepares a set of possible projects. Several marketing activities will be carried out by IJS EEC. The Chamber of Commerce, Chamber of Crafts and local energy agencies will be engaged.

In November and December several bilateral meetings are foreseen, where proposals of possible cooperation will be presented.

- **What's the threat of new businesses starting in this sector? How easy is it to start up in this business? What finance would be needed to start-up?**

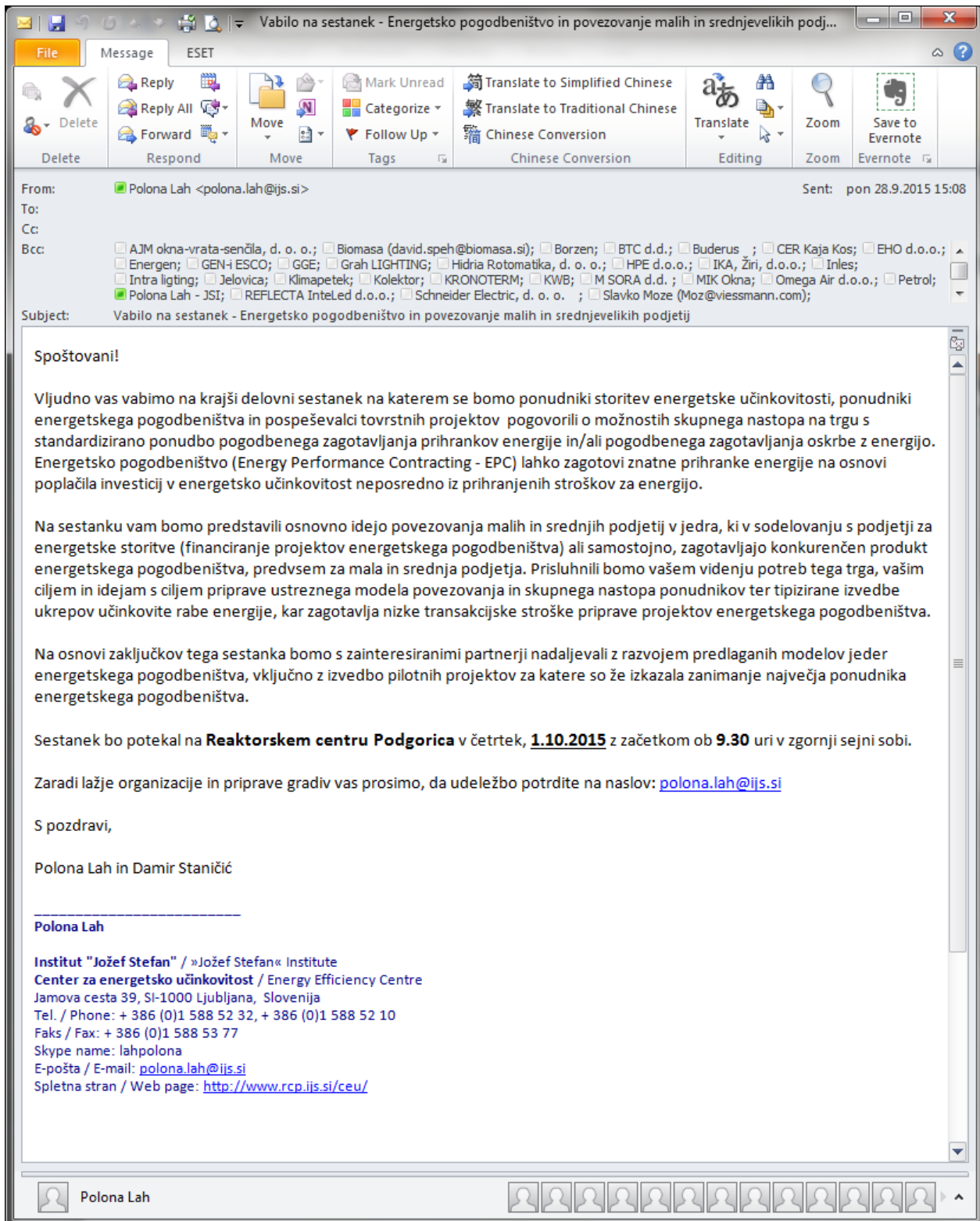
This issue was not discussed during this workshop, since it was too early for this topic.

From the outcomes of the questions above, please make a SWOT analysis:

<p>Strengths</p> <ul style="list-style-type: none"> ▪ there is currently no competition in the SME market for energy 	<p>Weaknesses</p> <ul style="list-style-type: none"> ▪ SME market is a very risky market ▪ Competition between suppliers after the end of the SPIN ▪ No strong networks between SPIN members
<p>Opportunities</p> <ul style="list-style-type: none"> ▪ SMEs as new market segment. ▪ Development of new services. ▪ Strong network (SPIN) can strengthen the EPC market 	<p>Threats</p> <ul style="list-style-type: none"> ▪ A lack of guaranty that savings will be paid off ▪ High risk of liquidation of SMEs or insolvency.

Annex: 1st workshop

Invitation



Vabilo na sestanek - Energetsko pogodbeništvo in povezovanje malih in srednjevelikih podj...

From: Polona Lah <polona.lah@ijs.si> Sent: pon 28.9.2015 15:08

To:

Cc:

Bcc: AJM okna-vrata-senčila, d. o. o.; Biomasa (david.speh@biomasa.si); Borzen; BTC d.d.; Buderus ; CER Kaja Kos; EHO d.o.o.; Energen; GEN-i ESCO; GGE; Grah LIGHTING; Hidria Rotomatika, d. o. o.; HPE d.o.o.; IKA, Žiri, d.o.o.; Inles; Intra lighting; Jelovica; Klimapetek; Kolektor; KRONOTERM; KWB; M SORA d.d. ; MIK Okna; Omega Air d.o.o.; Petrol; Polona Lah - JSI; REFLECTA InteLed d.o.o.; Schneider Electric, d. o. o. ; Slavko Moze (Moz@viessmann.com);

Subject: Vabilo na sestanek - Energetsko pogodbeništvo in povezovanje malih in srednjevelikih podjetij

Spoštovani!

Vljudno vas vabimo na krajši delovni sestanek na katerem se bomo ponudniki storitev energetske učinkovitosti, ponudniki energetskega pogodbeništva in pospeševalci tovrstnih projektov pogovorili o možnostih skupnega nastopa na trgu s standardizirano ponudbo pogodbenega zagotavljanja prihrankov energije in/ali pogodbenega zagotavljanja oskrbe z energijo. Energetsko pogodbeništvo (Energy Performance Contracting - EPC) lahko zagotovi znatne prihranke energije na osnovi poplačila investicij v energetske učinkovitost neposredno iz prihranjenih stroškov za energijo.

Na sestanku vam bomo predstavili osnovno idejo povezovanja malih in srednjih podjetij v jedra, ki v sodelovanju s podjetji za energetske storitve (financiranje projektov energetskega pogodbeništva) ali samostojno, zagotavljajo konkurenčen produkt energetskega pogodbeništva, predvsem za mala in srednja podjetja. Prisluhnili bomo vašemu vidanju potreb tega trga, vašim ciljem in idejam s ciljem priprave ustreznega modela povezovanja in skupnega nastopa ponudnikov ter tipizirane izvedbe ukrepov učinkovite rabe energije, kar zagotavlja nizke transakcijske stroške priprave projektov energetskega pogodbeništva.

Na osnovi zaključkov tega sestanka bomo s zainteresiranimi partnerji nadaljevali z razvojem predlaganih modelov jeder energetskega pogodbeništva, vključno z izvedbo pilotnih projektov za katere so že izkazala zanimanje največja ponudnika energetskega pogodbeništva.

Sestanek bo potekal na **Reaktorskem centru Podgorica** v četrtek, **1.10.2015** z začetkom ob **9.30** uri v zgornji sejni sobi.

Zaradi lažje organizacije in priprave gradiv vas prosimo, da udeležbo potrdite na naslov: polona.lah@ijs.si

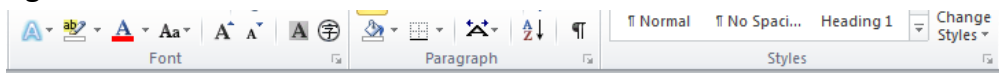
S pozdravi,


Polona Lah in Damir Staničič


Polona Lah

Institut "Jožef Stefan" / »Jožef Stefan« Institute
 Center za energetske učinkovitost / Energy Efficiency Centre
 Jamova cesta 39, SI-1000 Ljubljana, Slovenija
 Tel. / Phone: + 386 (0)1 588 52 32, + 386 (0)1 588 52 10
 Faks / Fax: + 386 (0)1 588 53 77
 Skype name: lahpolona
 E-pošta / E-mail: polona.lah@ijs.si
 Spletna stran / Web page: <http://www.rcp.ijs.si/ceu/>

Agenda

The image shows a Microsoft Word document with a ribbon at the top. The ribbon includes the 'Font' group (with icons for font face, size, bold, italic, underline, color, and background color), the 'Paragraph' group (with icons for bullet points, numbered list, indent, decrease indent, and text alignment), and the 'Styles' group (with icons for 'Normal', 'No Spacing', 'Heading 1', and a 'Change Styles' dropdown menu).

 Energy Performance Contracting Plus

 Jožef Stefan Institute, Ljubljana, Slovenia
Energy Efficiency Centre

|

Prva delavnica – Partnerstvo za energetska pogodbenišvo

Reaktorski center Podgorica, 1. oktober 2015

Agenda

- 1) Predstavitev projekta EPC+ in predstavitev ideje o vzpostavitve partnerstev za energetska pogodbenišvo med MSPji (SPIN-ov)
- 2) Predstavitev udeležencev/podjetij
- 3) Ugotavljanje interesa med udeleženci/podjetji, ocena trga, možnosti za sodelovanje
- 4) Identifikacija poslovnega modela, tehnologij, potencialnih naročnikov
- 5) Zaključki delavnice in nadaljnji koraki

Prisotna podjetja:

Pictures



List of participants and signature

Confidential.

Minutes in national language:

Partnerstvo za energetska pogodbeništvo

Reaktorski center Podgorica, 1.10.2015

Udeleženci:

Zaupno

Zapisnik sestanka

Energetsko pogodbeništvo (Energy Performance Contracting - EPC) lahko zagotovi znatne prihranke energije na osnovi poplačila investicij v energetska učinkovitost neposredno iz prihranjenih stroškov za energijo. Z novim finančnim obdobjem se odpira vrsta priložnosti na področju obnove stavb in drugih področij energetske učinkovitosti. Velik del načrtovanih investicij naj bi slonelo na modelu energetskega pogodbeništva.

Trg energetskega pogodbeništva se je preteklih letih začel pospešeno razvijati. Kljub napredku pa opažamo, da trg energetskega pogodbeništva ostaja razmeroma nerazvit. Na trgu deluje manjše število ponudnikov energetskega pogodbeništva, prisotno je nezaupanje pri potencialnih naročnikih, model je uspešen v določenih sektorjih in pri izvedbi specifičnih ukrepov.

Na delovnem sestanku med IJS CEU in vabljenimi podjetji (ponudniki storitev/produktov energetske učinkovitosti, ponudniki storitev energetskega pogodbeništva, pospeševalci trga) smo preverjali možnosti povezovanja in skupnega nastopa podjetij na trgu s standardizirano ponudbo pogodbenega zagotavljanja prihrankov energije in/ali pogodbenega zagotavljanja oskrbe z energijo.

Na sestanku je bila predstavljena osnovna ideja o povezovanju malih in srednjih podjetij v jedra oziroma SPIN-e. Ustanovljeni SPIN, bi skupaj s podporo podjetij za energetske storitve (financiranje projektov energetskega pogodbeništva) ali samostojno, zagotavljal konkurenčen produkt energetskega pogodbeništva, ki bi bil namenjen predvsem malim in srednje velikim podjetjem (MSP).

Udeleženci so predstavili ocene potreb tega trga, cilje in ideje, ki bodo upoštevane pri pripravi ustreznega modela povezovanja in skupnega nastopa ponudnikov.

Glavna sporočila udeležencev sestanka:

Ponudniki opreme in storitev energetske učinkovitosti podpirajo pobudo o sodelovanju in povezovanju ponudnikov opreme in storitev energetske učinkovitosti (na ravni razvoja produkta ter same izvedbe

ukrepov). Večinoma pogršajo, da na nacionalni ravni ni postavljenega jasnega koncepta, kot osnove za načrtovanje lastnega razvoja. Vsi opažajo upad investicij kot odraz pomanjkanja subvencij. Opozarjajo, da je energetska podobenštvo (kot javnozasebno partnerstvo) težavno zaradi zakonodaje. Potrebovali bi platformo, kjer bi se nahajale vse informacije in navodila o postopkih. Pri vzpostavljanju partnerstev je potrebno postaviti jasne kriterije kakovosti proizvodov in storitev URE, vzpostavitev norm in standardov. Pomen kvalitete storitve je potrebno postaviti pred samo ceno.

Dobavitelji energije in ESCO podjetja podpirajo idejo povezovanja in skupnega nastopa. Izkazali so interes po sodelovanju in financiranju projektov skupnega nastopa ponudnikov opreme in storitev energetske učinkovitosti.

ESCO podjetja izpostavljajo problem ciljnega trga MSP opozarjajo na težave z iskanjem naročnikov. Vstop na privatni trg ima drugačna pravila nastopanja kot javni sektor. Trg MSP je težavnejši, priprava projektov je dolgotrajnejša, težja so pogajanja. Tudi ostala podjetja/ponudniki opreme opažajo, da je na privatnem sektorju prišlo do upada projektov. Glavnirazlog je v pomanjkanju novih razpisov za dodelitev subvencij, kljub temu, da so ukrepi ekonomsko učinkoviti tudi brez njih. Izvedba ukrepov učinkovite rabe energije na podlagi modela energetskega pogodbenišтва ostaja razmeroma nepriljubljena, med drugim tudi zaradi nepoznavanja samega modela.

Organizator trga izkazuje interes za sodelovanje pri iniciativi skupnega nastopa podjetij znotraj SPIN-a. Vzpostavili so portal za energetska pogodbenišтва, kjer bodo objavljali primere dobrih praks. Trenutno sodelujejo pri izvedbi treh pilotnih projektov obnov večstanovanjskih stavb. Podoben pristop in nadgradnja baze ponudnikov je ena izmed možnosti razvoja predlagane iniciative.

IJS-CEU na podlagi prejetih informacij s strani udeležencev sestanka predlaga grobi koncept partnerstva:

ESCO podjetja – ponudniki finančnih virov (principal), ponudniki izdelkov - nastopajo s svojimi produkti in rešitvami, organizator trga z električno energijo – skrbi za povezovanje, vzpostavitev platforme, kjer se vzpostavlja baza ponudnikov kot osnova za povezovanje med ponudniki in naročniki, IJS-CEU deluje kot pospeševalec trga.

Udeleženci opozarjajo na težavo s katero se bomo pri vzpostavljanju partnerstvih in izvedbi skupnih nastopov soočali: delitev tveganj, delitev dobička, merjenje prihrankov posameznih ukrepov (težave predvsem pri toploti).

Nadaljnji koraki:

Na osnovi pridobljenih informacij tega sestanka bo IJS CEU z zainteresiranimi partnerji nadaljuje z individualnimi razgovori. Izvedeni bodo nadaljnji koraki pri izgradnji in razvoju možnega modela energetskega pogodbenišтва za vzpostavitev partnerstva. IJS CEU izvede nadaljnje aktivnosti mreženja in trženja, pripravi se nabor možnih projektov. Udeleženci sestanka pri iskanju potencialnih projektov nudijo podporo. IJS CEU k projektu angažira Gospodarsko zbornico, Obrtno zbornico in lokalne energetske agencije.

V mesecu novembru je predviden naslednji sestanek projektne iniciative, kjer bodo predstavljeni predlogi možnega sodelovanja. Na sestanku bodo vabljeni vsi udeleženci tega sestanka.

Zapisnik pripravila Polona Lah in Damir Staničič.