



Minutes of 2st workshop
Minutes of bilateral meetings with ESCOs and other
interested parties

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2st workshops / bilateral meeting: Participation of ESCOs as principal

a) General information

Title of the event: Bilateral meetings with ESCOs and other potential partners

Organized by: Jozef Stefan Institute – Energy Efficiency Centre

Date:

22th of September 2015 – a bilateral meeting between JSI and GGE

23th of September 2015 – a bilateral meeting between JSI and Petrol

14th of October 2015 – a bilateral meeting between JSI and Borzen

21th of December 2015 – a bilateral meeting between JSI and Eco Fund

18th of December 2015 – a bilateral meeting between JSI and The Chamber of Craft and Small Business of Slovenia

24th of March 2016 – a bilateral meeting between JSI and GEN-I

Duration: /

Location: Ljubljana in all cases

Invited SPIN partners: GGE, Petrol, GEN-I, Borzen - an electricity market organizer, ECO Fund, The Chamber of Craft and Small Business of Slovenia.

- GGE (Luka Komazec)
- Petrol (Miha Valentinčič)
- GEN -I (Dejan Paravan)
- Borzen (Borut Rajer, Iztok Gornjak)
- Eco Fund (Hinko Solinc)
- The Chamber of Craft and Small Business of Slovenia (Janko Rozman)

b) Agenda

The aim of bilateral meeting was to discuss whether or not ESCOs are interested in participating in SPIN partnerships as principals. There was no agenda sent in advance. The invitation to the meetings was sent via e-mail or arranged by telephone.

c) Questions to be answered

- **Assessment of your potential cooperation fields**

All ESCOs showed interest in participating to SPIN initiative. Two ESCOs have their own established market with several ongoing and successfully finished projects. One ESCO has just entered the market with new services based on energy performance contracting.

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.

All ESCOs showed interest in the participation to the SPINs as principal. They can easily 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, boilers, HVAC systems, measuring systems, compressed air. ESCOs show no interest in the renovation of envelope and windows.

- **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?**

The SMEs sector is more specific than public sector or large industries. There are different rules that need to be considered when entering the SME market.

There are no real barriers for establishing of SPINs under the ESCOs initiative. ESCOs can provide finance for EPC pilot projects. There are as well several credit lines available for financing of energy efficient projects.

- **Are there barriers to entry which give you greater power?**

At bilateral meetings the **buyer perspective** was not so thoroughly discussed since it was too early for this step. This point is going to be analysed later on when SPIN business plan will be elaborated. It was stressed the SME market is specific. Most of SMEs does not have enough information on the EPC concept and show a lack of knowledge. SMEs are more in favour of classical concept of financing of these measures. Their belief is that EPC is more expensive than classical financing. A threat of substitution from EPC to classical financing is quite high especially if subsidies for energy efficient measures for SMEs will be available.

It was commonly agreed that from **supplier perspective** the SPIN cannot be controlled by other suppliers. The market of energy efficient products and services is well developed.

Competitive Rivalry was not discussed during these meetings since it was clear to all market players that currently there are no EPC activities in the SME market.

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
<p>Opportunities</p> <ul style="list-style-type: none"> ▪ SMEs as new market segment ▪ Development of new services 	<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: 2st workshops – bilateral meetings

Invitations and confirmations:

From: Iztok Gornjak [<mailto:Iztok.Gornjak@borzen.si>]

Sent: Thursday, October 15, 2015 9:03 AM

To: Damir Staničič; polona.lah@ijs.si

Subject: Energetsko pogodbeništvo

Pozdravljena Damir in Polona,

Zahvaljujem se vama za včerajšnji obisk in pogovor o možnem sodelovanju v prihodnje. Očitno je, da bomo lahko v prihodnje sodelovali na večih področjih.

Kot že vesta bo v naslednjem mesecu zaživel portal za energetsko pogodbeništvo, zato vaju prosim, kot smo se včeraj pogovarjali na sestanku, za morebitne brošure, prispevke, članke, primere,... oz. vse kar bi bilo primerno za uvrstitev na portal in je primerno za informiranje širše javnosti o energetskem pogodbeništvu.

Za sodelovanje se vama zahvaljujem.

Lep pozdrav,

Iztok Gornjak

Analitik / Analyst

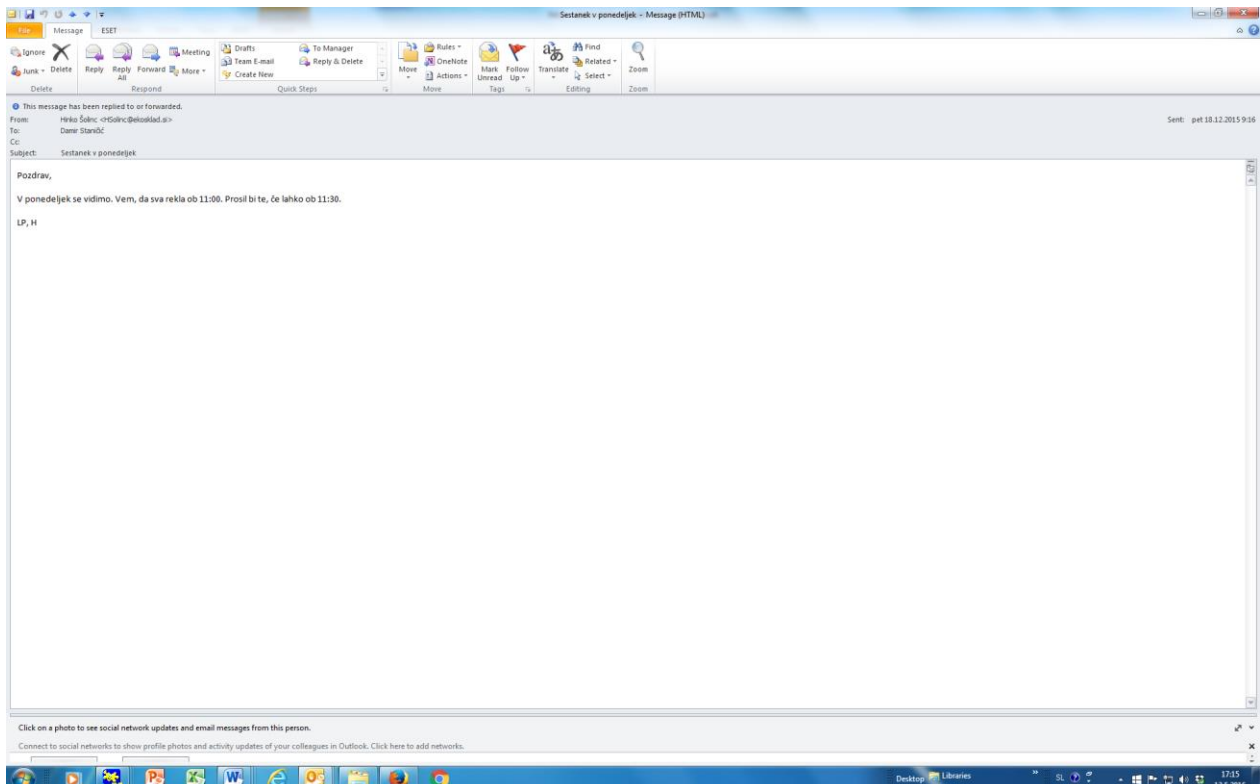
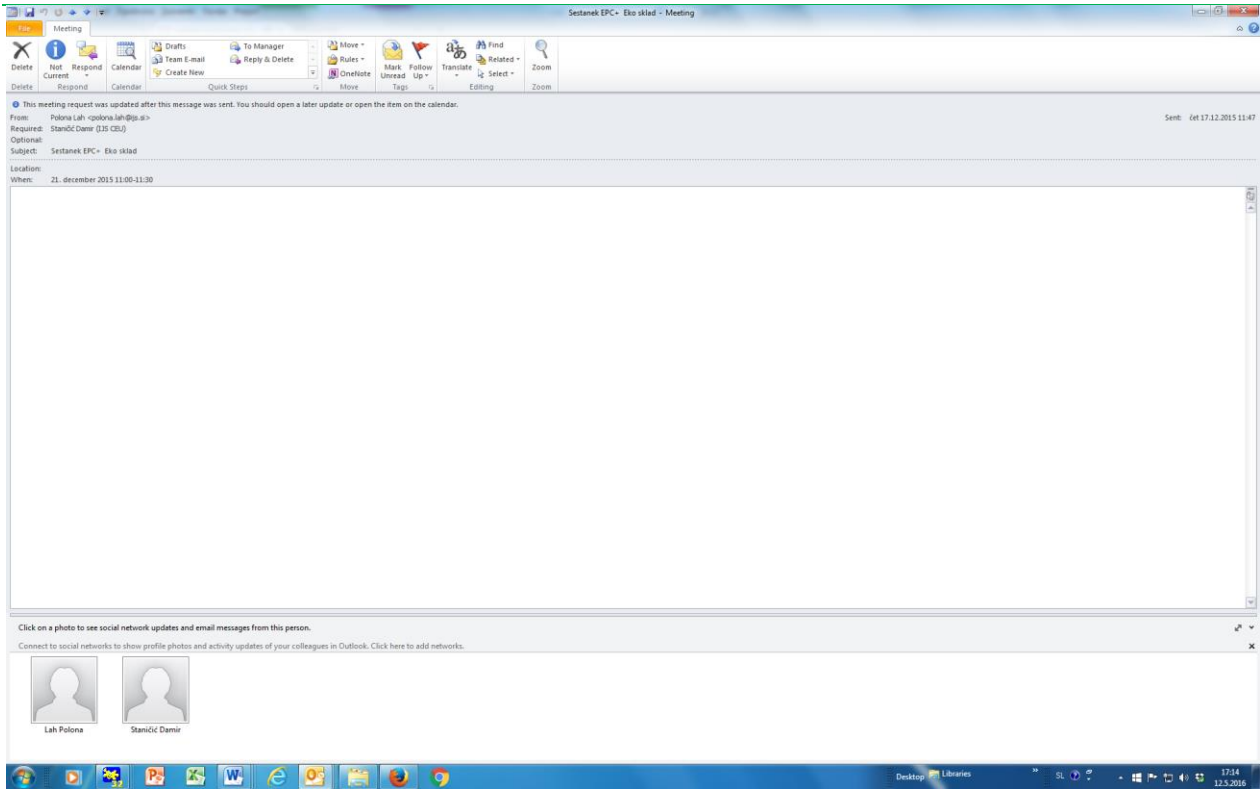
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From: Polona Lah [<mailto:polona.lah@ijs.si>]
Sent: Wednesday, December 09, 2015 3:28 PM
To: Larisa Vodeb
Cc: Staničič Damir (IJS CEU)
Subject: Prošnja za sestanek

Spoštovana ga. Vodeb,

Na vas se obračamo, ker si želimo preveriti kakšne so možnosti sodelovanja med Institutom Jožef Stefan - Centrom za energetske učinkovitost (IJS CEU) ter OZS. Namreč, IJS CEU kot partner sodeluje pri evropskem projektu EPC+, ki je financiran znotraj programa H2020. Projekt pokriva področje energetskega pogodbenišva (natančneje pogodbenega zagotavljanja prihrankov energije (ang. EPC)) katerega glavni cilj je širitev modela EPC na mala in srednje-velika podjetja.

Ideja projekta je, da se ustanovi t.i. »spin« oz združenje ponudnikov proizvodov in storitev energetske učinkovitosti, ki bi s podporo obstoječih ponudnikov storitev energetskega pogodbenišva, finančnih inštitucij in IJS CEU, s skupnim nastopom na trgu ponudili standardizirano storitev EPC. Standardizirana storitev bi vključevala energetske učinkovite proizvode slovenskih proizvajalcev in slovensko znanje. Predvidena ciljna skupina (kupci/naročniki) so prav tako mala in srednje-velika podjetja.

Na IJS CEU smo imeli v mesecu oktobru prvi sestanek na to temo, na katerem se je zbralo kar nekaj slovenskih proizvajalcev in ponudnikov storitev URE, ki to pobudo pozdravljajo in so izkazali interes po aktivnem sodelovanju pri tej iniciativi.

Glede na to, da je sama ideja precej kompleksna, (s širitvijo storitev EPC vstopamo na segment MSP – kompleksen trg, ki do zdaj še ni pokrit), je naša želja ustvariti čim širšo podporo tudi s strani akterjev, ki posredno ali neposredno združujejo MSP.

Na OZS si v prihodnjih dneh želimo oglasiti na sestanku, kjer bi vam bolj podrobno predstavili idejo projekta in preverili kakšne so možnosti za sodelovanje. Z naše strani predlagamo naslednje termine za srečanje: **14.12, 15.12, 17.12 ali 18.12.**

Hvala za vaš odziv.

S pozdravi,

Polona Lah

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