



Bundesamt  
für Wirtschaft und  
Ausfuhrkontrolle



# Learnings from 5 years of monitoring the German market for energy efficiency services. A market-based approach towards energy efficiency

eccee Summer Study 2021: A New Reality

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## Federal Energy Efficiency Center (BfEE)

Tasks defined by the German Energy Efficiency Services Act (last amended in 2020)

### Aims

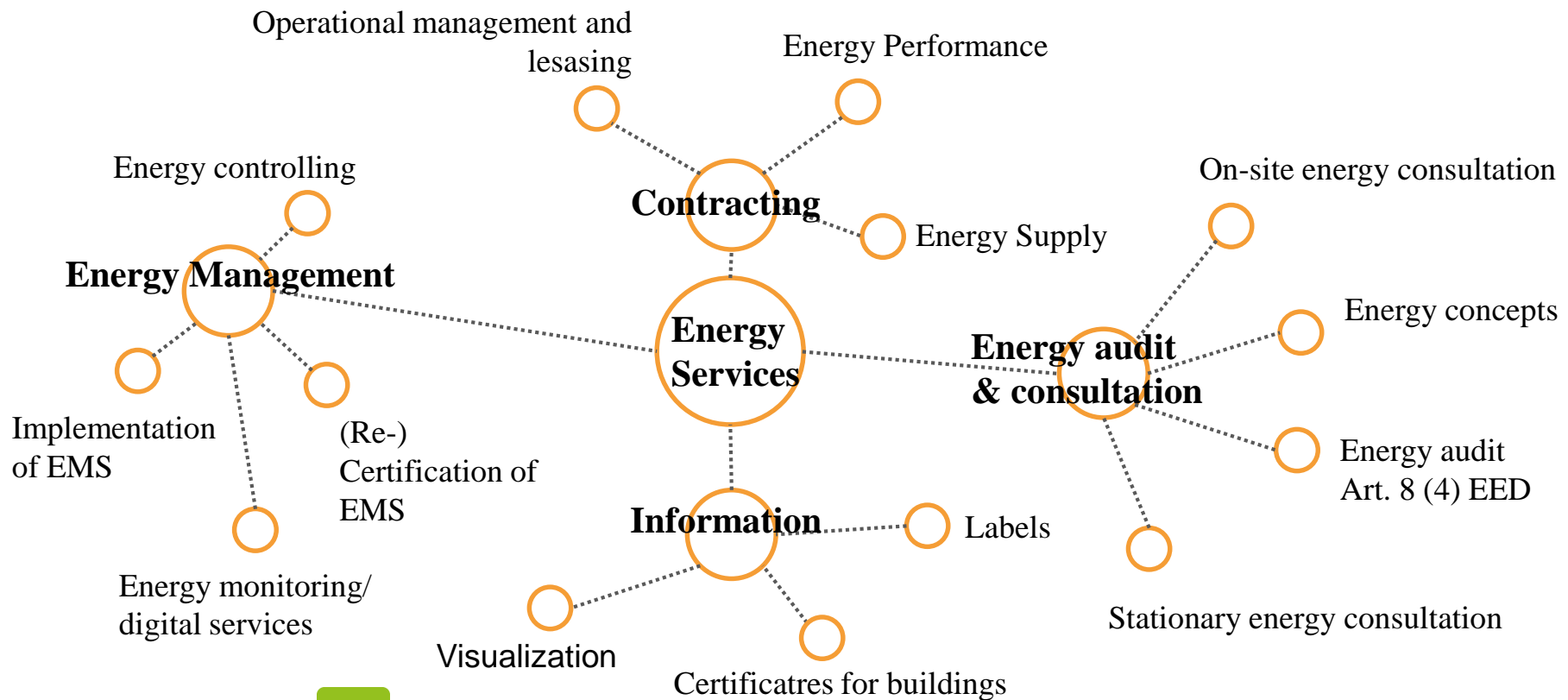
- monitoring the market for energy efficiency services
- support (further) development of energy efficiency measures
- provide information and increase transparency in the market

### Projects

- market surveys 2016, 2017, 2018, 2020, 2021



## Overview of the analysed energy services in detail





**5** sub-studies, **6.501** respondents, over **77.500** interview minutes



Supply  
Web

Supply  
Telephone



Demand:  
  
Enterprises



Demand:  
  
Private  
Households



Demand:  
  
Public  
sector



## Structure of the study

### Statistical information

#### **Industry**

Sectors; Federal country within Germany;  
Number of employees;

#### **Private households**

(leased) property, year of construction, annual  
income, size of household

#### **Public sector**

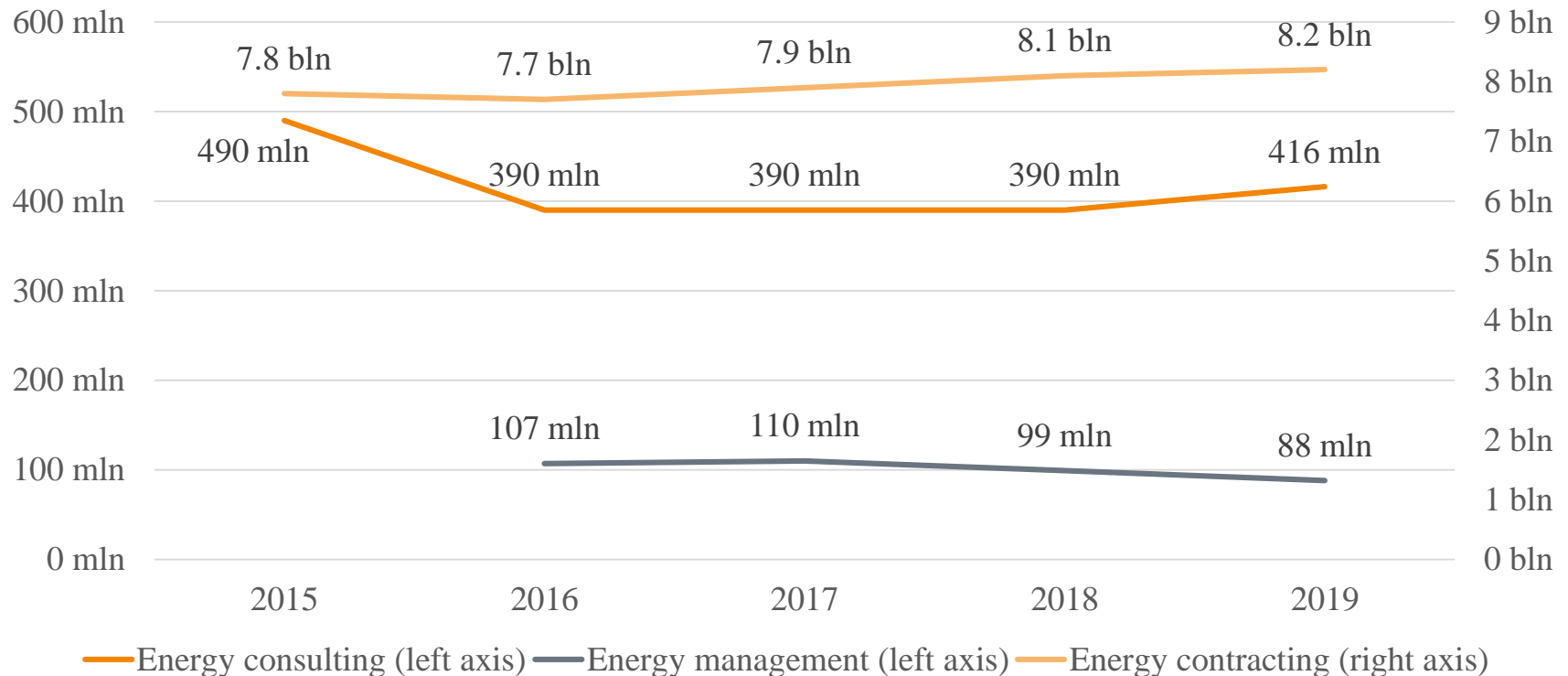
Country within Germany, administrative level,  
number of buildings

### Key questions

- **Marketvolume**
  - Prices of products and services
  - Sales
- **Offering structure**
  - Number of suppliers
  - regional distribution of suppliers
  - sectors
  - size and revenue of suppliers
  - products and services
- **Demand for energy efficiency**
  - Main customer group
  - Use of energy services
  - readiness to use / obstacles
  - Reason /motivation to use energy services



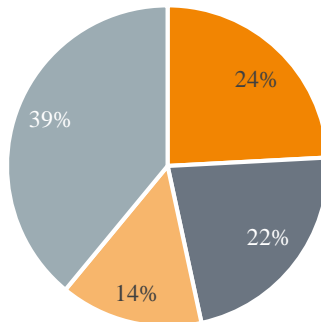
The market volume for energy services remains stable.  
The outcome continues to depend on where and how closely the study looks.





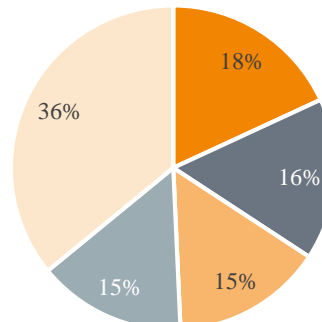
## Customer Groups vary by EES-segment

Energy contracting (n = 162)



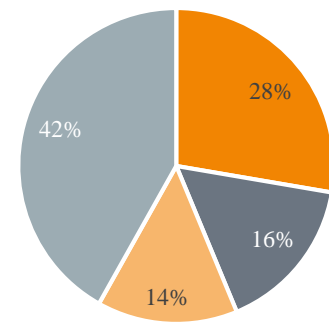
- Real estate
- Public sector
- Private households
- Other

Energy consulting (n = 656)



- Private households
- Other commercial
- Real estate
- Other industry
- Other

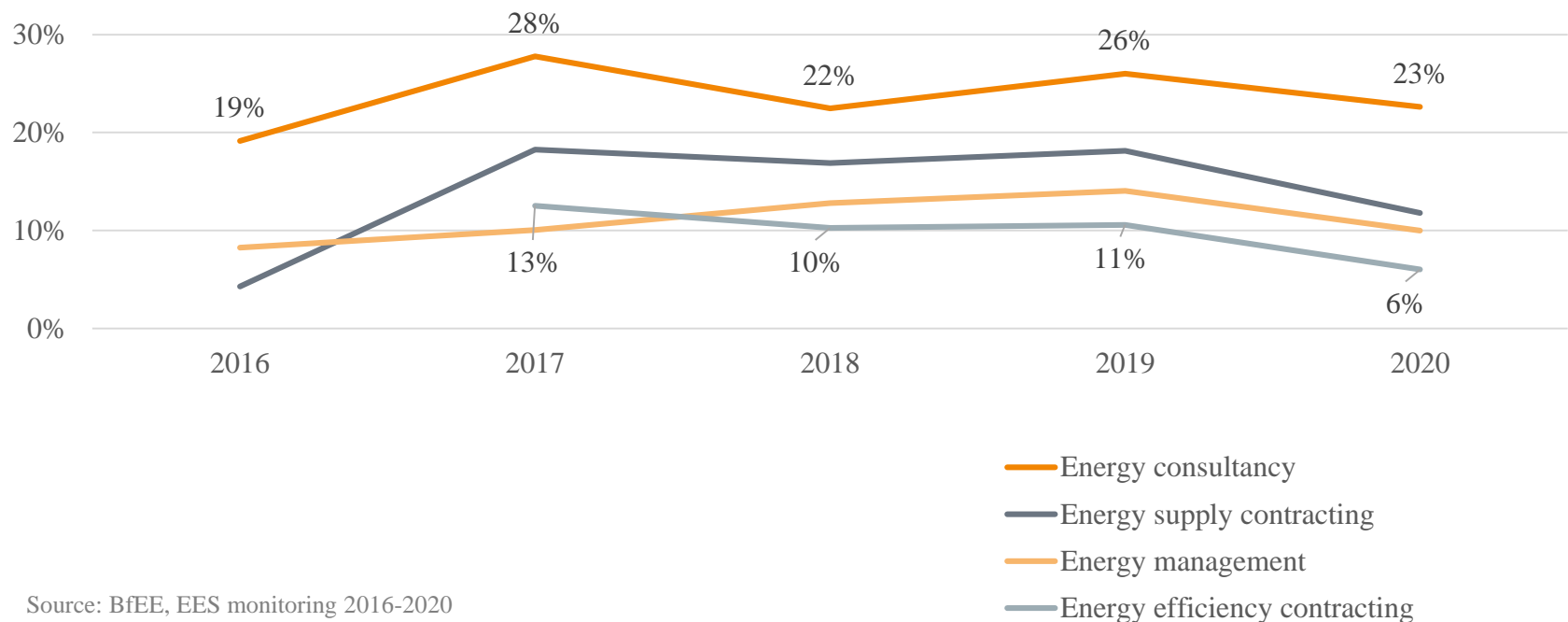
Energy management (n = 99)



- Energy intense industry
- Other industry
- Other commerce
- Other



## Usage rates of EES in the commercial sector: Consultancy and supply contracting over management and efficiency contracting

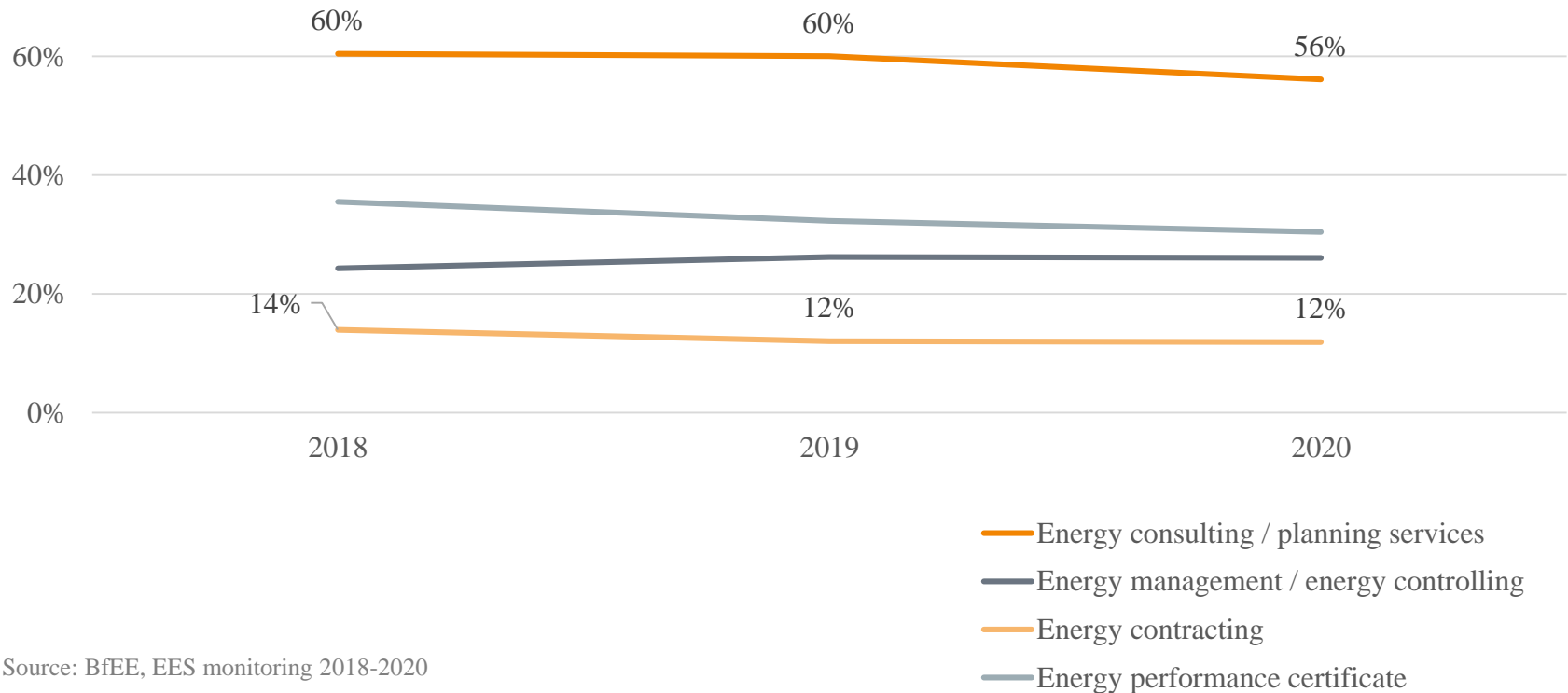


Source: BfEE, EES monitoring 2016-2020





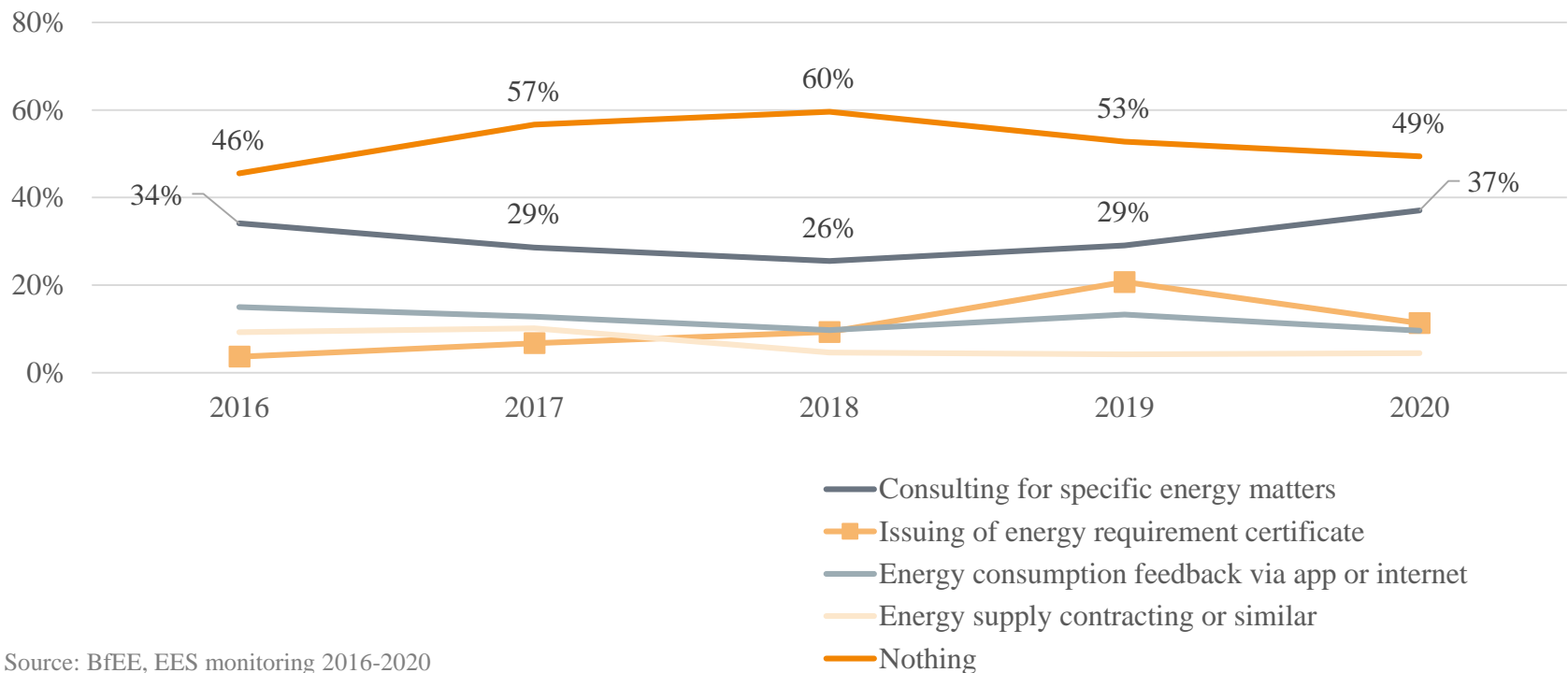
## Public sector: Energy consulting demand largest by far



Source: BfEE, EES monitoring 2018-2020



## Consulting most demanded EES, but most households did not use EES at all



Source: BfEE, EES monitoring 2016-2020



## Use of energy efficiency services in private households

### Motivation and barriers

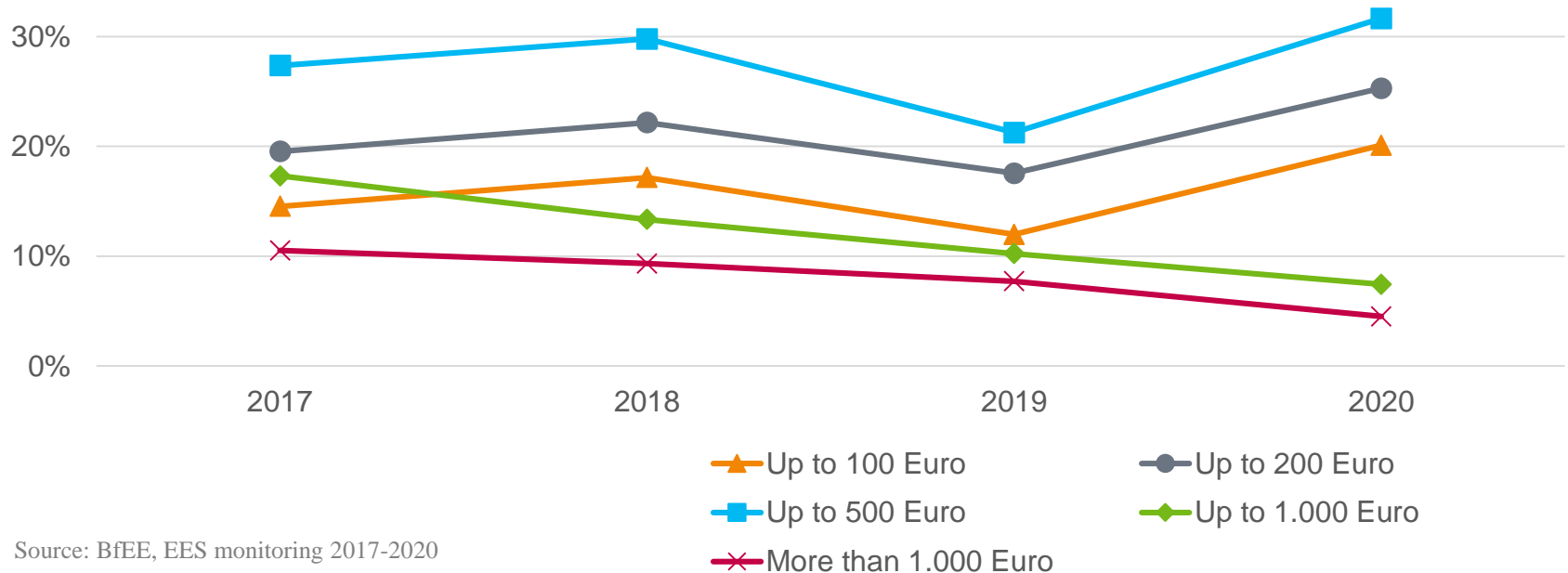
Most common reasons for not using energy consultancy services:

- 1) no need for action on the building ("I am not planning any construction measures on the building", 55 %),
- 2) **questions on the subject would rather be clarified without an advisor (45 %),**
- 3) already low energy costs (39 %), or
- 4) **the added value of the advice was not clear (38 %).**



## Use of energy efficiency services in private households Motivation and barriers

Private households: "How much are you willing to pay for energy consultancy?"



Source: BfEE, EES monitoring 2017-2020



## Use of energy efficiency services in private households

### Measures

- Subsidies for consultation and follow-up measures, such as the installation of a new heating systems
- Tax deduction for renovation costs since 2020
- National carbon pricing system in the sectors transport and heating since 2021

Focus:

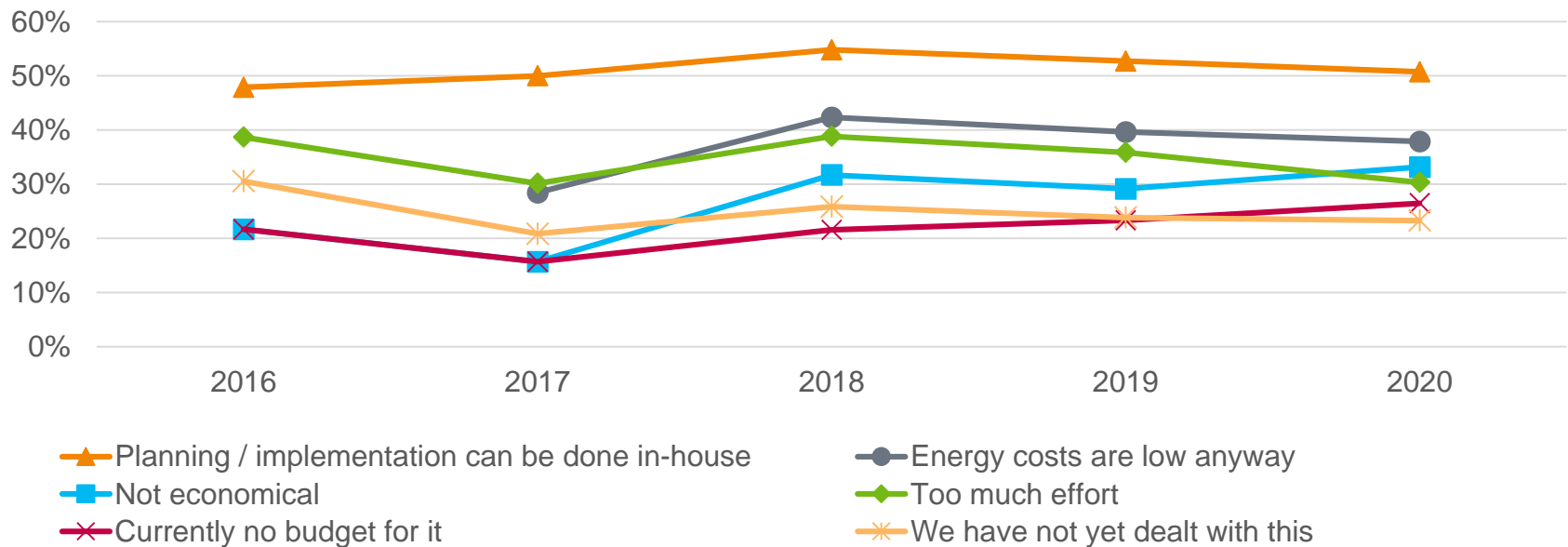
An **adequate communication campaign**



## Use of energy efficiency services in the commercial sector

### Motivation and barriers

Top reasons against using energy efficiency services



Source: BfEE, EES monitoring 2016-2020



## Use of energy efficiency services in the commercial sector

### Measures

#### Focus:

- Effective incentives and price signals should be introduced and carbon-leakage scenarios should be considered
- **Information campaigns** to influence perceptions and actions



## Use of energy efficiency services in the public sector

### Motivation and barriers

Main barriers for energy services:

- 1) insufficient budget (31%)
- 2) preference for an in-house solution (28%), often perceived as the more economical solution in contrast to external services
- 3) low energy costs (18%)
- 4) “too much effort” (17%)

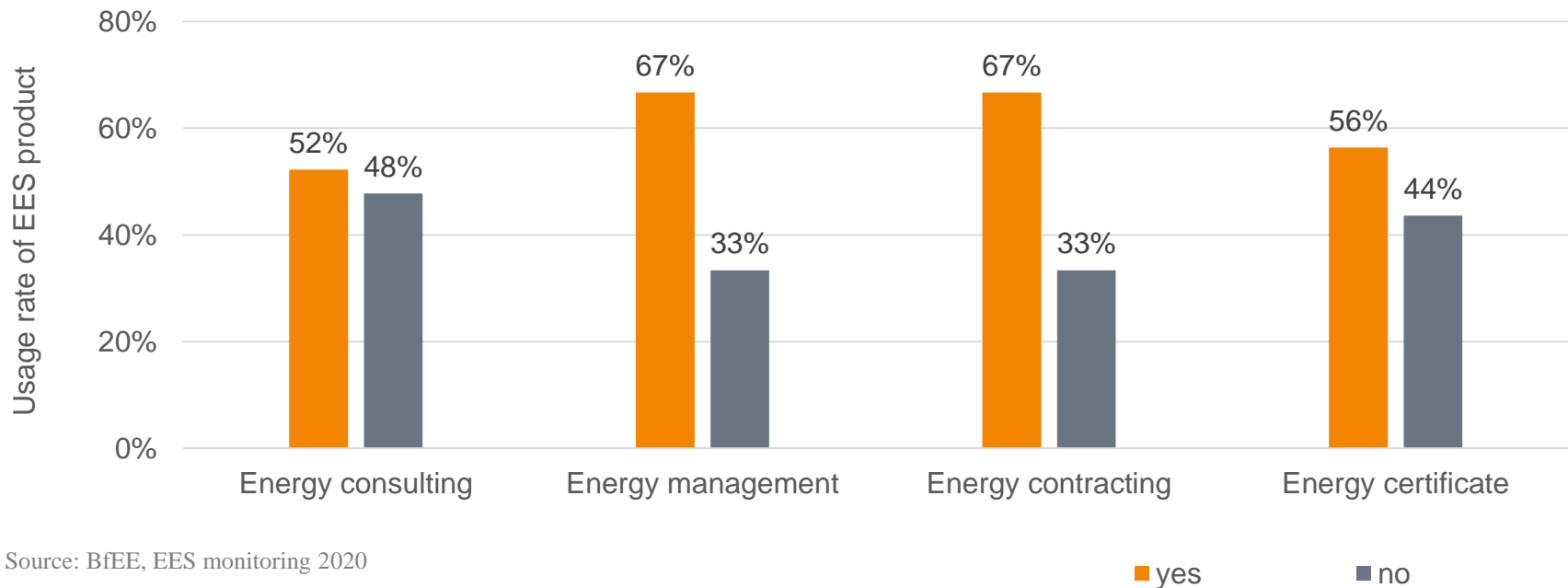




## Use of energy efficiency services in the public sector

### Motivation and barriers

Are there established structures for energy efficiency?





## Use of energy efficiency services in the public sector

### Measures

#### Focus:

- **Additional funding and work force** in the area of energy efficiency
- **Information campaigns** to influence perceptions and actions



## Conclusion and outlook

- mature and stable market
- no indications for shortages on the provider side
- suppliers are optimistic about the market development in the next three years
- strong incentives from policy makers already set in motion



# Thank you for your attention!

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<http://www.bfee-online.de/BfEE/DE/Energiedienstleistungen/Marktkennzahlen>