



Minutes of 1st workshop

Spain
English language

March 2016
Confidential



Co-funded by European Union

Author

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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.

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

a) General information

Title of the event: About the EPC+ project and market assessment

Organized by: Escan, s.l.

Date: 24th September 2015

Duration: 10:30 am– 14:30 pm

Location: Avda. Emilio Lemos 2, 41020 Sevilla

Invited SPIN partners:

- SPIN partner 1:
 - **Atmosfera Cubica, s.l.**,
 - Mr. Javier López Mauri, Administrator partner,
 - SMES engineering, light and building envelope company

- SPIN partner 2:
 - **Escan, s.l.**,
 - Mrs. Margarita Puente, Project Manager,
 - Energy consulting and EPC facilitator

- SPIN partner 3:
 - **iON Smart Energy, s.l.**
 - Mr. Jose Antonio Valles, General Manager,
 - SMEs small energy services company, HVAC, electric consume monitoring

b) Agenda

1. Presentation of the SPIN Companies
2. Presentation of EPC+ project
3. Requirements for potential SPIN partners
 - a. Present and discuss the SWOT analysis of SPINs (D2.1)
 - b. Present and discuss the categories of SPINs (D2.2)
4. Assessment of national/local energy efficiency market
5. Voluntary Agreement for SPIN creation

c) Questions to be answered

1. Threat of New Entry:

- **What's the threat of new businesses starting in this sector?** Economic crisis with lead to very few clients; still remains lack of energy efficiency and renewable awareness in the SMEs sector.
- **How easy is it to start up in this business?** Not easy because lack of the energy efficiency awareness in SMEs, no financial lines or very difficult to achieve from banks neither of public authorities.
- **What finance would be needed to start-up?** The creation of a new company includes minimum of 3000 Euro according o the national legislation and then it is necessary another 3000 for wages, office maintenance, etc. SPIN 1 will not create a new company officially but all members of SPIN sign a Volunteer Agreement elaborated by Escan and agreed upon all members. This is included in the Annex.
- **Are there barriers to entry which give you greater power?** Cluster of specialist companies provide more range of services to be provided and more quickly than big ESCO companies offer.

2. Buyer Power: Where there are fewer buyers, they often control the market. Questions here include:

- **How powerful are the buyers?** Few SMEs are powerful in Seville and mostly coming from small-medium industry and car sector. The SMEs are mostly dedicated to tourism and commerce sector also small agro-food industries; auto repair shop, printers, local petrol stations, hotels, restaurants bars, commerce and tourism.

- **How many are there?** In Spain more than 3 million of companies and 99.8% are SMEs and 15% are placed in Andalucia. According the official data DIRCE 2015 the number of PYMEs was 480094 in 01/01/2015 <http://www.ine.es/prensa/np924.pdf>. More than 26000 are dedicated to industry sector, 51000 to building sector, 134000 to commerce sector and 267000 to other services and mostly tourism, car .

Empresas activas por comunidades autónomas

Cataluña fue la comunidad que más empresas activas concentró a 1 de enero de 2015, con el 18,3% del total. Le siguieron Comunidad de Madrid (16,0%) y Andalucía (15,1%).

Empresas activas según sector económico, por comunidades y ciudades autónomas.

Datos a 1 de enero de 2015

	Total	Industria	Construcción	Comercio	Resto de servicios
TOTAL	3.186.878	198.004	405.849	763.930	1.819.095
Andalucía	480.094	26.826	51.699	134.485	267.084
Aragón	89.873	6.677	12.596	20.131	50.469
Asturias, Principado de	67.451	3.496	8.435	15.375	40.145
Baleares, Illes	87.111	4.413	14.485	16.672	51.541
Canarias	132.857	5.014	14.230	32.856	80.757
Cantabria	37.332	2.071	5.413	8.458	21.390
Castilla y León	161.119	11.672	24.295	40.022	85.130
Castilla-La Mancha	125.786	12.173	19.400	33.755	60.458
Cataluña	584.369	36.383	72.857	128.622	346.507
Comunitat Valenciana	339.533	24.243	41.407	87.783	186.100
Extremadura	64.475	4.797	8.438	19.398	31.842
Galicia	195.595	12.548	29.742	49.775	103.530
Madrid, Comunidad de	508.612	22.608	59.661	98.443	327.900
Murcia, Región de	90.031	6.681	12.194	25.078	46.078
Navarra, Comunidad Foral de	43.131	3.850	6.122	9.830	23.329
País Vasco	148.575	11.995	21.163	34.274	81.143
Rioja, La	23.083	2.401	3.073	5.516	12.093
Ceuta	3.749	81	309	1.506	1.853
Melilla	4.102	75	330	1.951	1.746

DIRCE- AÑO 2015 (5/7)

- **Can the buyers get costs down?** Yes they can but then the periods of contracts are longer. The energy service providers propose a cost and some clients want reduction.

- **Do they have the power to dictate terms?** It is an agreement between the energy service provider or SPIN member and the buyer; the company makes and economic analysis and provide to the buyer the terms of costs and the period of the contract; sometimes there is a negotiation phase and the buyer prefers not to pay at the beginning and only recovers the investment with the energy savings; then the number of years is longer and most of the small energy services providers fix a maximum of 5-6 years contract. Also they use formulae of 4+2 the contract is for 4 years with the possibility to increase to 2 more years.

- 3. Threat of Substitution: If there are available alternatives then the threat of substitution increases.
 - **How easy is it to find an alternative to this product or service?** The energy efficiency service is not replaced at this stage
 - **Can it be outsourced? Or automated?** The outsources or automatisisation occurs in big industries but not in SMEs.

- 4. Supplier Power: Markets where there are few suppliers means the suppliers retain the power.
 - **Examine how many suppliers are in the market? Are there a few who control prices?** In Seville less than 5 small energy service providers and 3 big ESCOs. There are more than 30 companies that sell products on lighting, windows, insulation materials, boilers, photovoltaic panels,... mostly are international companies of products but no energy services providers.
 - **Or many so prices are lower?** This is depending on the products but the prices are very similar form one companies to others
 - **Do your suppliers hold the power?** Usually big ESCOS work for big industries and complex builsdings , big hotels. The participants of the SPIN mainly clients are SMEs.
 - **How easy is it to switch, what's the cost?** No comments.

- 5. Competitive Rivalry: Markets where there are few competitors are attractive but can be short-lived. These are highly competitive markets with many companies chasing the same work reduce your power in the market.
 - **What's the level of competition in this sector?** There is market for several actors. Sometimes big ESCOS are competitors
 - **What's the competitor situation?** Many competitors and you're all in a commodity situation or a few? In the lighting sector much competition because there are many actors in the market. The situation is not easy; to get a project it is necessary to present proposal to 10 clients about 7% of success; In the energy services sectors HVAC and including the energy consumption metering specialisation not so many competitors at local level and about 20% of successful.

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

<p>Strengths</p> <ul style="list-style-type: none"> ▪ More widely and completed services. The members of SPIN provide different energy services competences ▪ Better marketing ▪ Approaching to more potential clients of SMEs 	<p>Weaknesses</p> <ul style="list-style-type: none"> ▪ Budget ▪ Economic crisis to industry and SMEs ▪ Competitors after the first projects
<p>Opportunities</p> <ul style="list-style-type: none"> ▪ To know more clients of the SMEs sector ▪ Availability of managerial and technical tools that will be elaborated in EPC PLUS ▪ European dimension, to know other experiences of SPIN in EU countries outside Spain. ▪ Platform for exchange experiences with other companies and SPIN partners. 	<p>Threats</p> <ul style="list-style-type: none"> ▪ Projects abandon ▪ Clients that are not economically solvency not financial. ▪ Companies SMEs that will close after one year contract with SPIN.

1st workshop (bilateral meetings), SPIN 2: About the EPC+ project and market assessment

Escan organised bilateral meetings with the members of SPIN 2.

Bilateral meeting with Aura solar, SPIN 2

Organized by: Escan, s.l.

Date: 21th September 2015

Duration: 09:00 am– 11:00 pm

Location: Avda. Ferrol 14, 28029 Madrid

Invited SPIN partner:

The invited company is a SME that operates in Spain with headquarter in Madrid. It provides services of engineering installation and maintenance on solar thermal and photovoltaic systems for SMEs, residential sector, etc.

- SPIN partner 1:
 - **Aura Solar, s.l.**
 - Mr. Carlos Cabezas,
 - SME specialist on installation and maintenance of solar thermal and photovoltaic systems.

- SPIN partner 2:
 - **Escan, s.l.,**
 - Mrs. Margarita Puente, Project Manager,
 - Energy consulting and EPC facilitator.

Aura Solar signed the Letter of Intent for the EPC+ proposal.

Escan did send several emails and made some telephone calls with this SME since 9th June 2015; the first one to inform that EPC+ was approved by EASME.

One bilateral meeting has been carried out. Escan did explain the main activities for the SPIN creation and pilot projects. Several questions were pointed out by Aura solar and answered.

Invitation to provide information and photos for the leaflet for SPIN2; Escan also explained the Voluntary Agreement (MoU) *Acuerdo Voluntario de Colaboración*. This agreement has been signed few weeks after the meeting.

Bilateral meeting with Ingenere, SPIN 2

Organized by: Escan, s.l.

Date: 29th October 2015 (and 21st December 2015)

Duration: 09:30 am– 11:00 pm

Location: Avda. Ferrol 14, 28029 Madrid

Invited SPIN partner:

The invited company is a SME that operates in Spain with headquarter in Madrid. It provides services of engineering, building certification, energy management, refurbishment and renewable energy systems for the building sector.

- SPIN partner 1:
 - **Ingenere**
 - Mr. Israel Sánchez, Manager
 - Building certifier, engineering

- SPIN partner 2:
 - **Escan, s.l.,**
 - Mrs. Margarita Puente, Project Manager,
 - Energy consulting and EPC facilitator

Ingenere and Escan met twice in bilateral meetings at Escan office.

During the first one Escan did explain the EPC+ project in general and the main activities for the SPIN creation and pilot projects. Hand out the project leaflet that was useful for this meeting.

The second meeting was very useful because Escan did solve some questions and showed the draft version of leaflet for SPIN2. Ingenere did provide feed - back for the leaflet. The signature of the Voluntary Agreement (MoU) *Acuerdo Voluntario de Colaboración* was also carried out at this meeting.

Annex: 1st workshop, SPIN 1

Invitation and Agenda

De: mpuente [mailto:mpuente@escansa.com]

Enviado el: lunes, 07 de septiembre de 2015 13:51

Para: 'José Antonio Vallés Santaella'; javier.lopez@atmosferacubica.com'

CC: 'Rosa Molina'

Asunto: EPC PLUS

Buenos días,

Agradezco que podamos reunirnos el día 24 en las oficinas de ION Smart Energy.

Orden del día

Presentación de las empresas

Presentación de EPC +

Tipos de clientes actuales y potenciales

Acuerdo Voluntario

Si deseáis incorporar algún otro tema lo incluimos.

Se adjunta el Acuerdo Voluntario de Colaboración del proyecto EPC+ para vuestra consideración. Este indica que las empresas firmantes podrán en forma conjunta ir a convocatorias públicas y a clientes privados.

Si estáis de acuerdo lo podemos firmar después de la reunión.

Muchas gracias

Saludos cordiales,

Margarita Puente

Jefe de proyectos

Escan, s.l.

Pictures



1st Workshop of SPIN 1 in Spain.

Atmosfera Cubica

Escan

ION Smart Energy



Annex: bilateral meetings, SPIN 2

Invitation to Aura Solar

De:	mpuente [mpuente@escansa.com]	Enviado el:	martes 09/06/2015
Para:	'Escan'		
CC:			
CCO:	'Jose.valles@ionse.es'; 'jmescudero@ecoinversol.com'; 'cm.cabezas@grupodima.com'; 'mtorre@hcb.es'; 'asoto@hcb.es'; 'smelgosa@ebuilding.es'; 'Francisco Puente'		
Asunto:	Proyecto EPC+		

Mensaje | Cuestionario EPC.xlsx (203 KB)

Estimado Sr,

La Comisión Europea ha aprobado el proyecto EPC+ en el que participan 11 países europeos. El responsable en España es Escan s.l. consultores energéticos. El principal objetivo es promover la colaboración entre pequeñas y medianas empresas para que ofrezcan servicios energéticos eficientes.

En su momento Vds. nos enviaron una Carta de Apoyo para la propuesta, por lo que estamos muy agradecidos.

Las pequeñas y medianas empresas podrán beneficiarse si forman un "cluster" de empresas que por sí solas no pueden ofrecer los servicios globales que requiere el cliente. Pero al agruparse en un cluster ya pueden funcionar como una ESE y ofrecer una gama de servicios más completa.

Un cluster estará formado por varias empresas: Por ejemplo de biomasa, de iluminación, de climatización, de ahorro de agua y energía, micro CHP, solar, sistemas de control, ingenierías, financieros, etc. Opinamos que al menos el cluster debe agrupar 3 ó 4 empresas que no compiten entre sí y se benefician al poder ofrecer un "conjunto de servicios" en el mercado.

De: mpuente [<mailto:mpuente@escansa.com>]
Enviado el: jueves, 3 de septiembre de 2015 14:03
Para: cm.cabezas@grupodima.com
Asunto: PROeycto EPC PLUS

Buenos días Carlos

Me gustaría tener una reunión sobre un nuevo tema EPC PLUS para creas de manera voluntaria Clusters de empresas
www.epcplus.org

Por favor dime si pudieras venir a partir del miercoles día 9 por la mañana y lo hablamos

Gracias

Margarita Puente

Jefe de proyectos

Invitation to Ingenerere

De: Israel Sanchez [israelsanchez@ingenere.es] Enviado el: miércoles 16/12/2015 1
Para: mpunte
CC:
Asunto: Re: Invitación sobre EPC+

[Primero](#) [Anterior](#)

Buenos días Margarita, podríamos reunirnos el próximo lunes 21, por la mañana.

Un Saludo

Enviado desde mi iPhone

El 16 dic 2015, a las 12:49, mpunte <mpunte@escansa.com> escribió:

Buenos días Israel,

Si ya estás por Madrid y podrías llamarme (estoy en la oficina de 8:30 a 14:00 y de 16:30 a 18:30), o me indicas a qué hora puedo localizarte y yo te llamo para retomar el tema del Cluster=grupo de empresas.

Gracias.

Saludos cordiales,

Margarita Puente
Jefe de proyectos