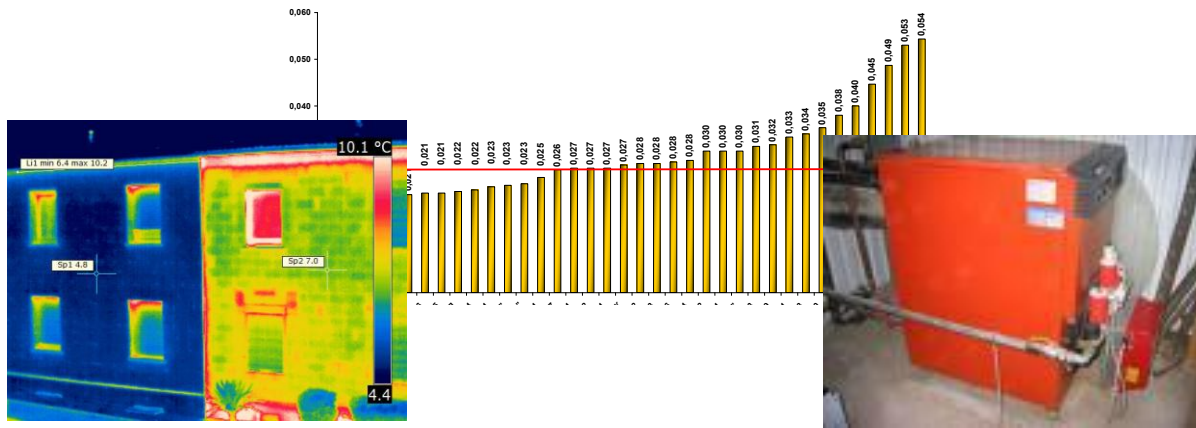


Needs Assessment on Energy Efficiency Services



Klaus Haars
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1. Program, tasks and schedule

Tasks 1

1. Needs assessment of potential clients (enterprises, households, others)
2. Identification of barriers preventing the fulfillment of needs
3. Appraisal of potentials to meet the needs by (semi)-commercial EE-services

Tasks 2

4. Lessons learned from experiences in Ukraine concerning existing needs and design of commercial EE-services
5. Review of priorities of project executing agencies (city and oblast Odessa) concerning public EE-services
6. Design of a portfolio on EE-services for a regional energy agency in Odessa

Responsibilities

Robert Künne, project manager

- Supervision

Klaus Haars, EE-consultant

- Execution

Oblast and city Odessa, communal enterprises

- Support, feedback, data research

Schedule 1

August, first half

first mission; interviews with resource persons and institutions in Ukraine; discussion with city and oblast Odessa

August

preparation of concept; plannings of further steps

early September

second mission; discussion with partners, resource persons and institutions in Odessa; preparation of research activities (surveys, interviews etc.)

Schedule 2

September

execution of research activities

September/early October

preparation of report on needs assessment;
preparation of draft portfolio on EE-services

October

third mission; presentation of report on needs
assessment; discussion of draft portfolio with partners

End of October

finalisation of portfolio

2. Preliminary remarks on needs assessment

Enterprises

Results of a survey of the „Institute for Economic Research and Policy Consulting” on manufacturing enterprises

- Average share of energy expenses in production costs is 11.4 %
- 31 % have introduced some energy management and 19 % plan to do so
- 64 % have already implemented some EE-measures
- Private companies are more active than public owned ones
- Larger companies are more active than small and medium ones

Enterprises 2

- Strong needs – small demands ... on EE-services
- Main barriers:
 - low awareness on energy efficiency
 - low energy tariffs in the past
 - low profitability of many enterprises
 - poor strategic thinking of many owners and top managers
 - little information on EE available
 - few qualified EE services available
- How to counteract barriers?

Enterprises 3

- Which needs are most pressing?
- Which EE-services enterprises are prepared to pay for?
- Which support partners (city and oblast Odessa) and other institutions (chamber of commerce and industry and others) may lend in this regard?

Households

- Households consume more than one third of the energy consumption of Ukraine.
- The demand for EE-services is insignificant.
- Reducing energy consumption of household is economically important for Ukraine → Public authorities may be willing to finance EE-services to households
- Examples: awareness campaigns, energy days, leaflets and brochures ...

Municipalities

- Strong needs
- Mostly better developed awareness than in the private sector
- Main barrier for commercial service is lack of funds
- Relations between a (semi)-public owned energy agency and public authorities have to be analysed
- Examples: energy monitoring and controlling, energy audits, design of EE measures

Thank you for your attention!

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