





Joan Vidal 27 March 2019 **EPC MARKET IN SPAIN**



EPC Market in Spain

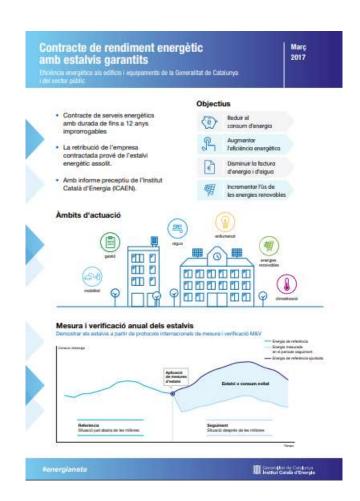
- According to ANESE₍₁₎ ESCOs revenue is about €1,170M although those responding to the survey represent €400M revenue.
- Approximately two-thirds of the energy services contracts are for street lighting.
- The vast majority of the public sector is using the P1..5 Chauffage model led by energy supply and maintenance services.
- In the public sector, the number of tenders including some level of EE scope and their tender value have been as follows:

	2014	2015	2016
# of tenders	272	278	159
Average tender value	2,476,254 €	1,550,777€	1,256,071 €

1) Spanish ESCO Association. 2016 survey including 59 ESCOs

Contract Models in the Public Sector: ICAEN Catalonia

- EPC model for public buildings in Catalonia
 http://icaen.gencat.cat/web/.content/10_ICAEN/17_publicacio
 ns_informes/04_coleccio_QuadernPractic/quadern_practic/ar
 xius/12_contractesRendimentEnergetics_pdf.pdf
- Originally developed in 2013 and updated in March 2018 to align to Eurostat's guidance
- Service contract up to 12 years
- Structured with two main deliverables: Efficiency and Maintenance annual installments
- Savings have a cap and floor in the tender to achieve goals but also avoid unrealistic proposals
- Annual M&V following IPMVP with Retrofit Isolation technique (Options A & B)



ICAEN led EPCs to date

Facility	Tender Year	Duration (years)	Investment (€)	Annual Maintenance (€)
High Performance Sports Center	2013/2014	10	1,200,000	58,828 € /y
Catalan Institute of Oncology (1)	2014	4	700,000	650,000 €/y
12 High School Institutes (2)	2014	4	-	40,000 €/y
Agri-food Lab	2015	5	40,000	45,000 €/y
National Museum of Contemporary Art (1)	2016	4	250,000	500,000 €/y

-) Maintenance contracts with some ECM scope on them
- 2) Energy management contracts with savings M&V

Upcoming tenders in 2019:

- Hospital Vall d'Hebron (largest hospital in Catalonia)
- Police school of Catalonia

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