

# Clean Energy Business Council 2019 *ESCO* Survey

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ESCO Subgroup

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# CEBC Energy Efficiency Working Group

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# CEBC Working Groups

- Future Mobility Club;
- Climate Finance Working Group;
- Women in Clean Energy;
- Energy Efficiency Working Group;
  - Industry
  - ESCO

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# 2019 ESCO Survey

# Invited ESCOs for the Survey

25 ESCOs invited to participate in the survey – 21 completed the survey

Al Mazrouie & Partners

Al Shirawi FM

Al Tayer Engineering

BK Gulf

Bond Interiours

Cofely Besix FM

Duserve

Enova

Environmental Solutions  
& Consultancy

Envirofina

Farnek TFM

GECO

Hansa Energy Solutions

Sharaf Electronics

Siemens

Smart Automation Energy

Smart4Power

Taka Solutions

Honeywell

Imdaad

ISTA Middle East

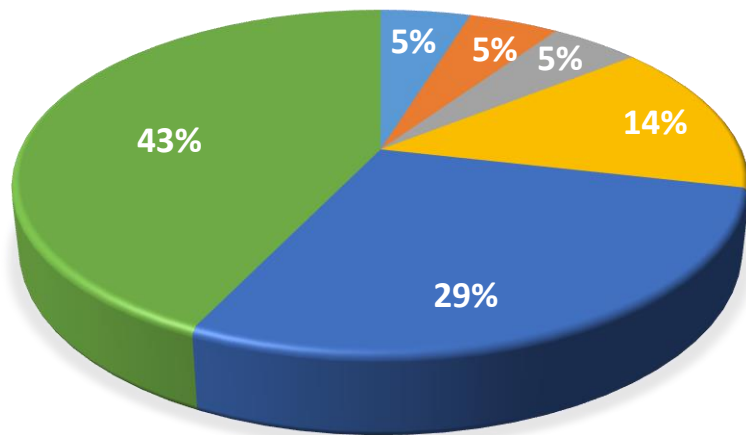
Johnson Controls

Signify Lighting

Quantum Eurostar

QTM

RESPONDENTS



Executive

Senior Manager

VP

CEO

Director

Manager

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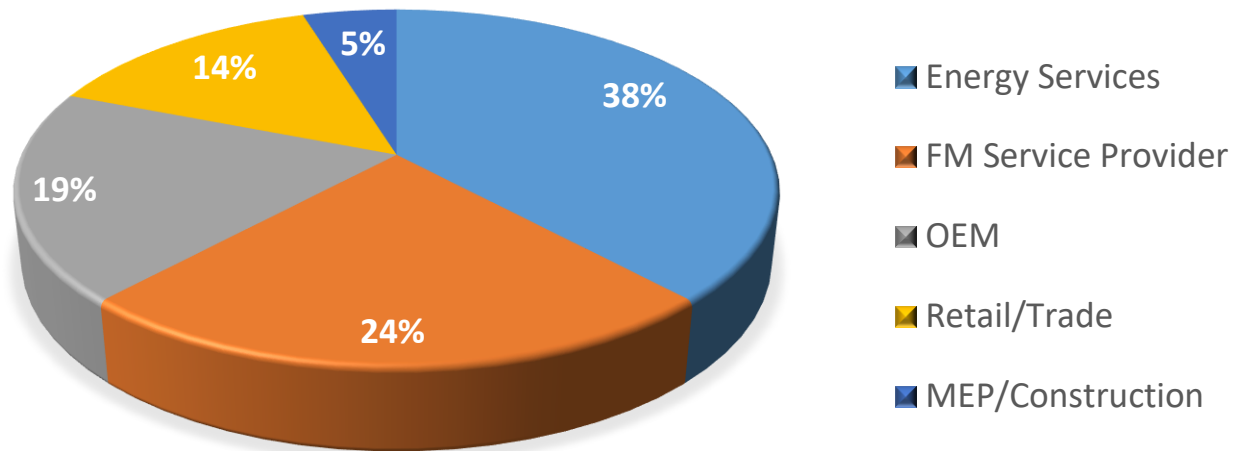


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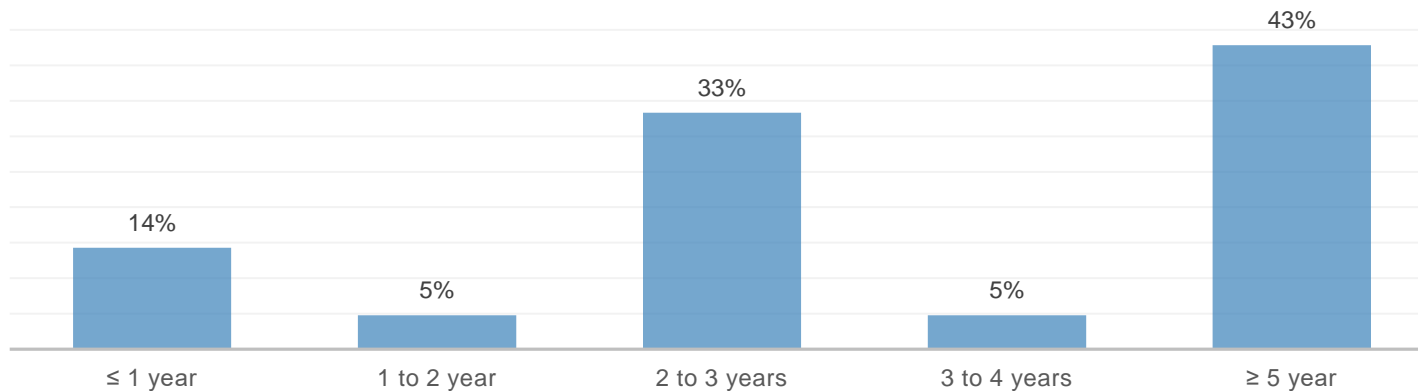
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# Profile of the ESCOs

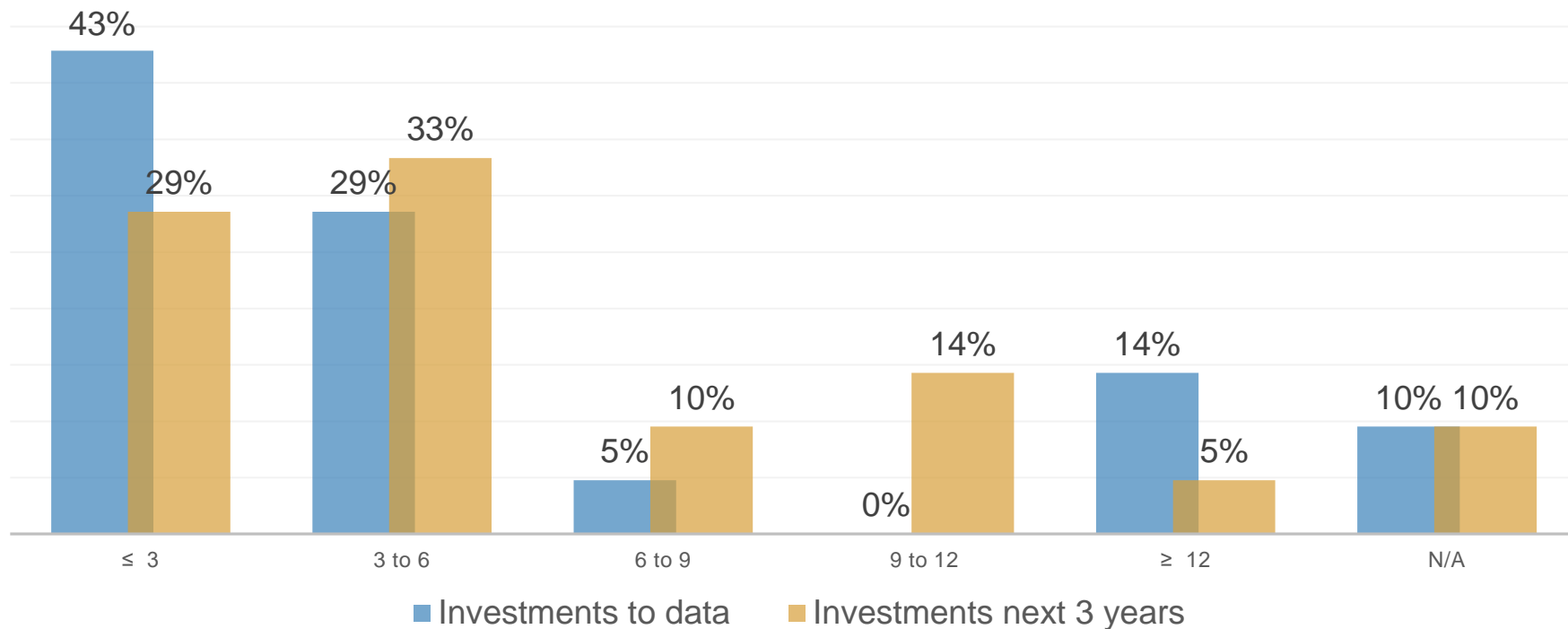
Core business of the company



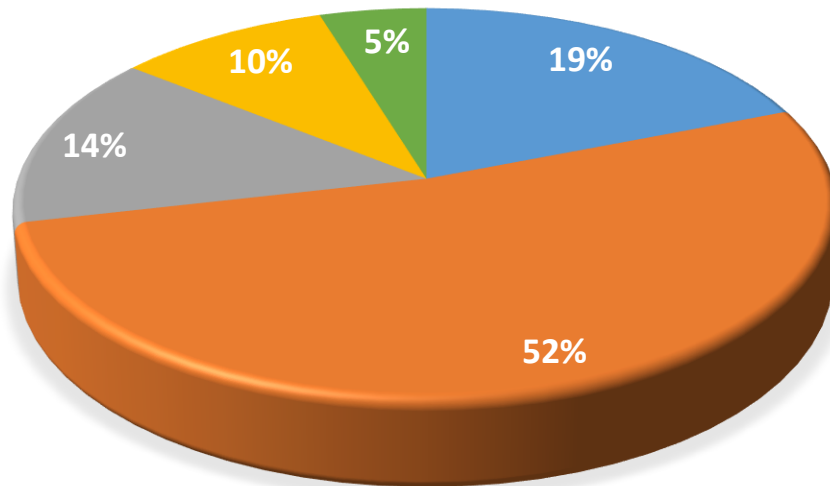
Years active as ESCO



# Investments by ESCOs



# Recruitment plans for next 3 years

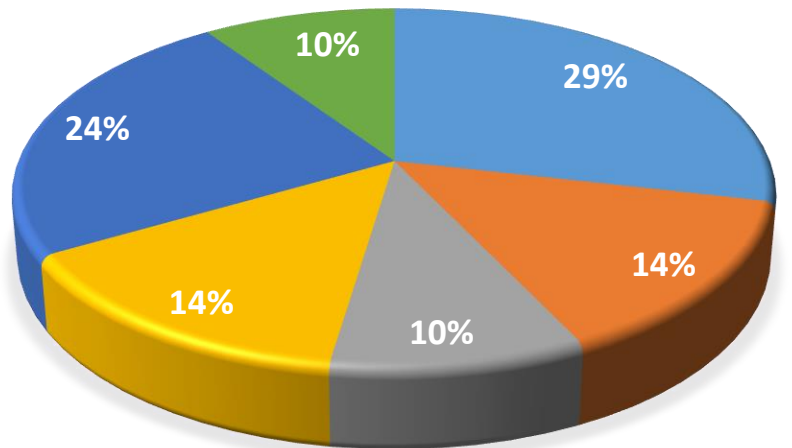


Expected new job opportunities at ESCOs in next 3 years are ranging from **117 to 242**

■ ≤ 3   ■ 4 to 10   ■ 11 to 20   ■ 20 to 30   ■ ≥ 30   ■ N/A

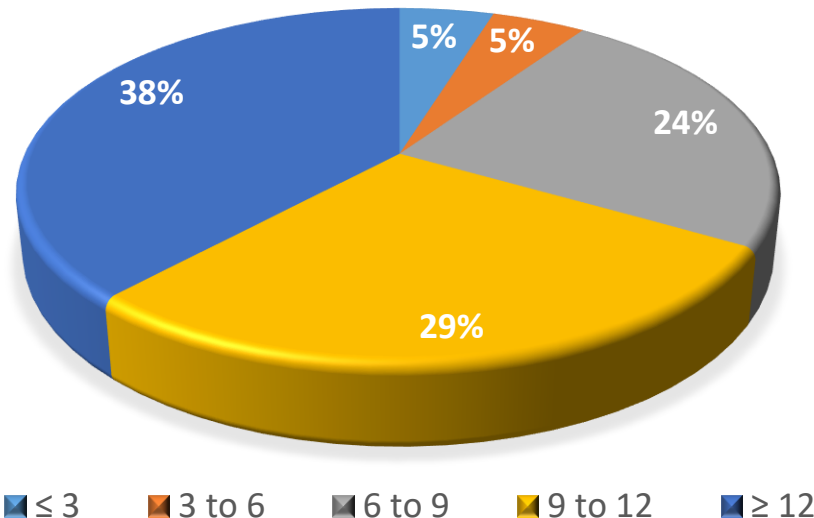
# Project Revenues

Average project value for last 3 years (mAED)



■ ≤ 3 ■ 3 to 5 ■ 6 to 8 ■ 8 to 10 ■ ≥ 10 ■ N/A

Necessary annual revenue (mAED)

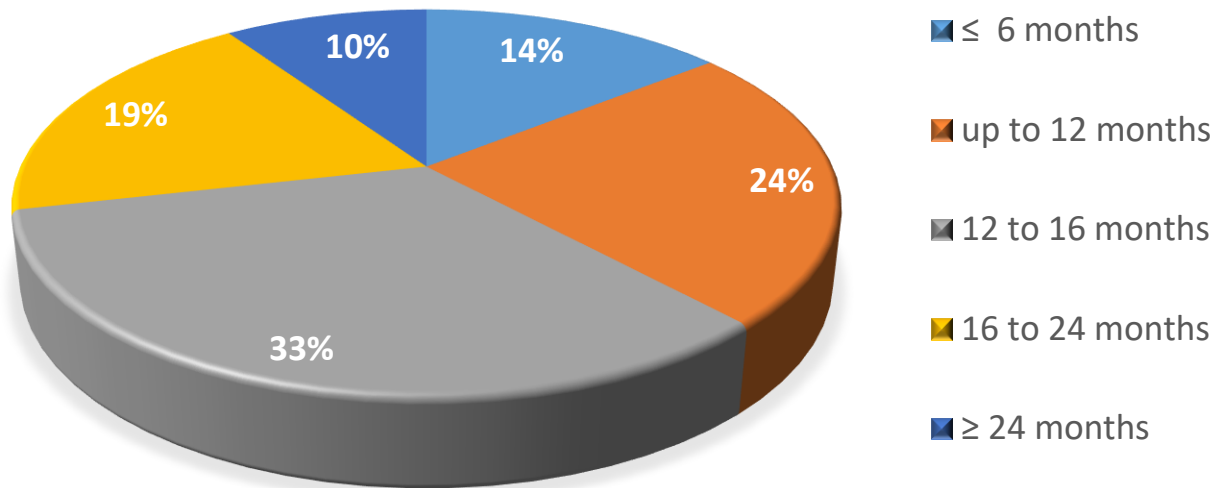


■ ≤ 3 ■ 3 to 6 ■ 6 to 9 ■ 9 to 12 ■ ≥ 12

ESCOs require a total of more than AED 220 million revenue annually to sustain

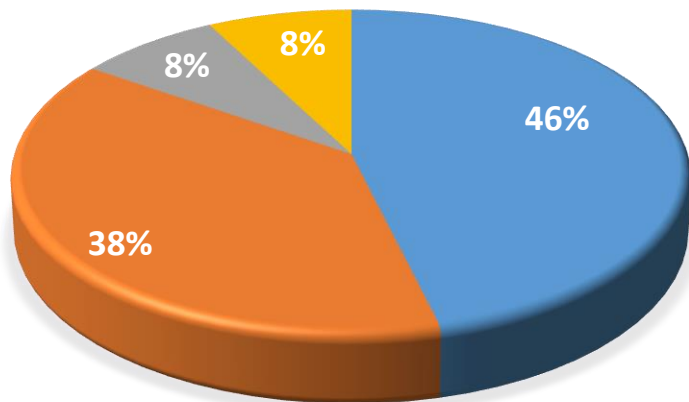
# Project Cycle

From initial contact to signing of the performance contract



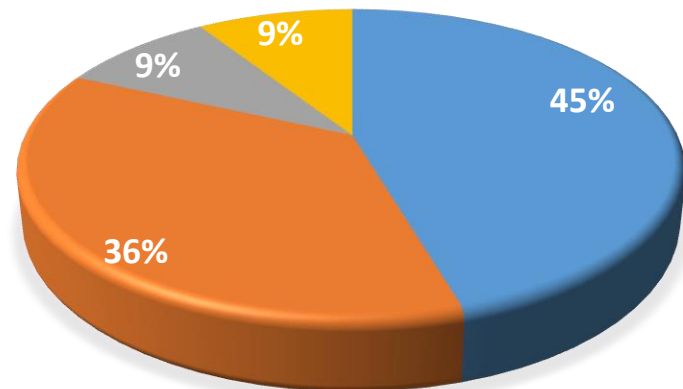
# Expansion Plans

## Expansion in the UAE



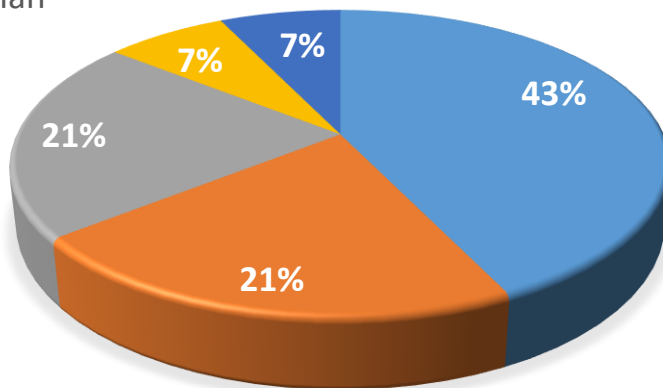
- Abu Dhabi / Al Ain
- Ras Al Khaimah
- Sharjah
- Dubai
- Umm AL Quwain
- Fujairah
- Ajman

## Expansion in MENA



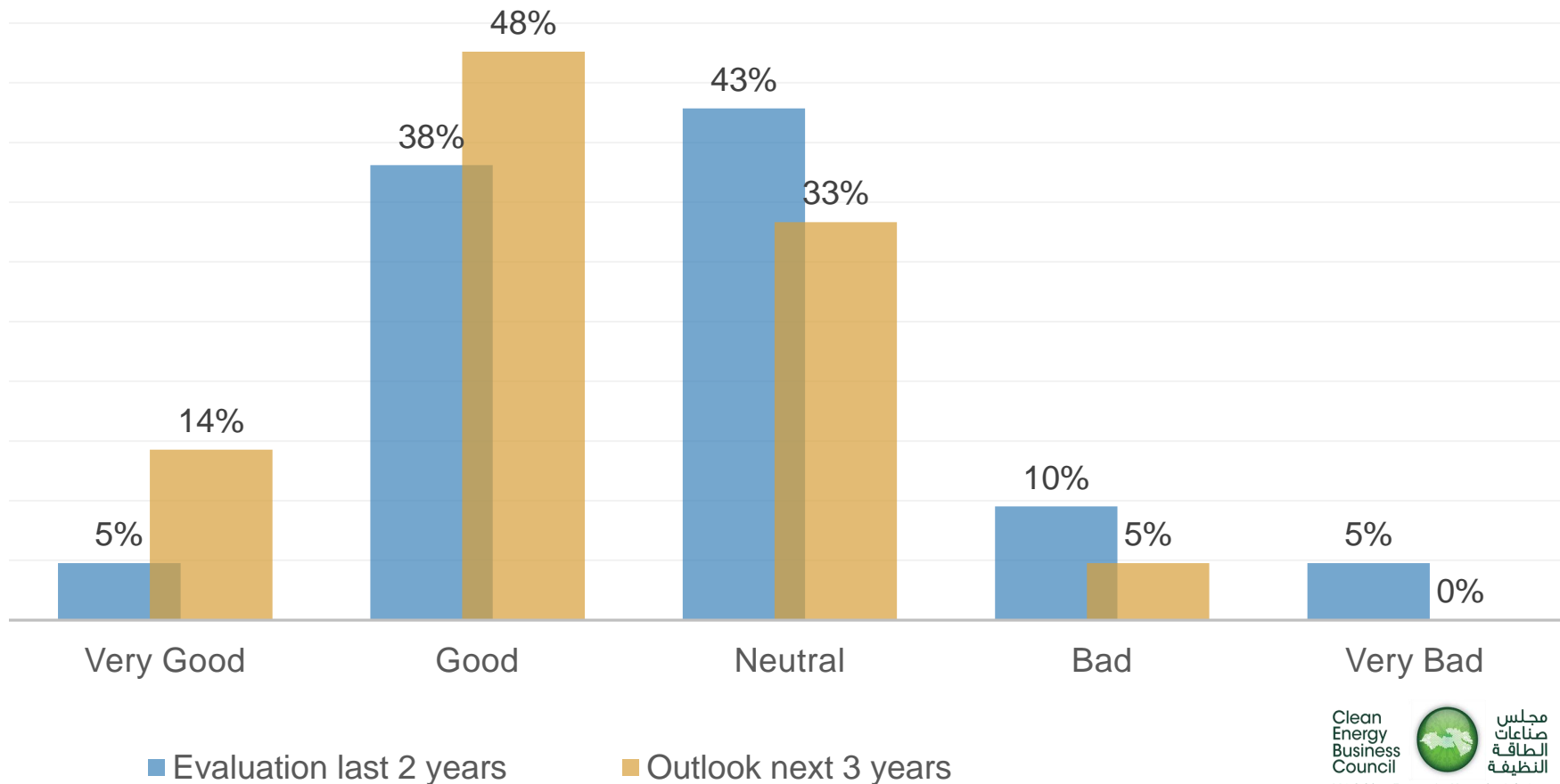
- Saudi Arabia
- Egypt
- Kuwait
- Bahrain

## Expansion in GCC

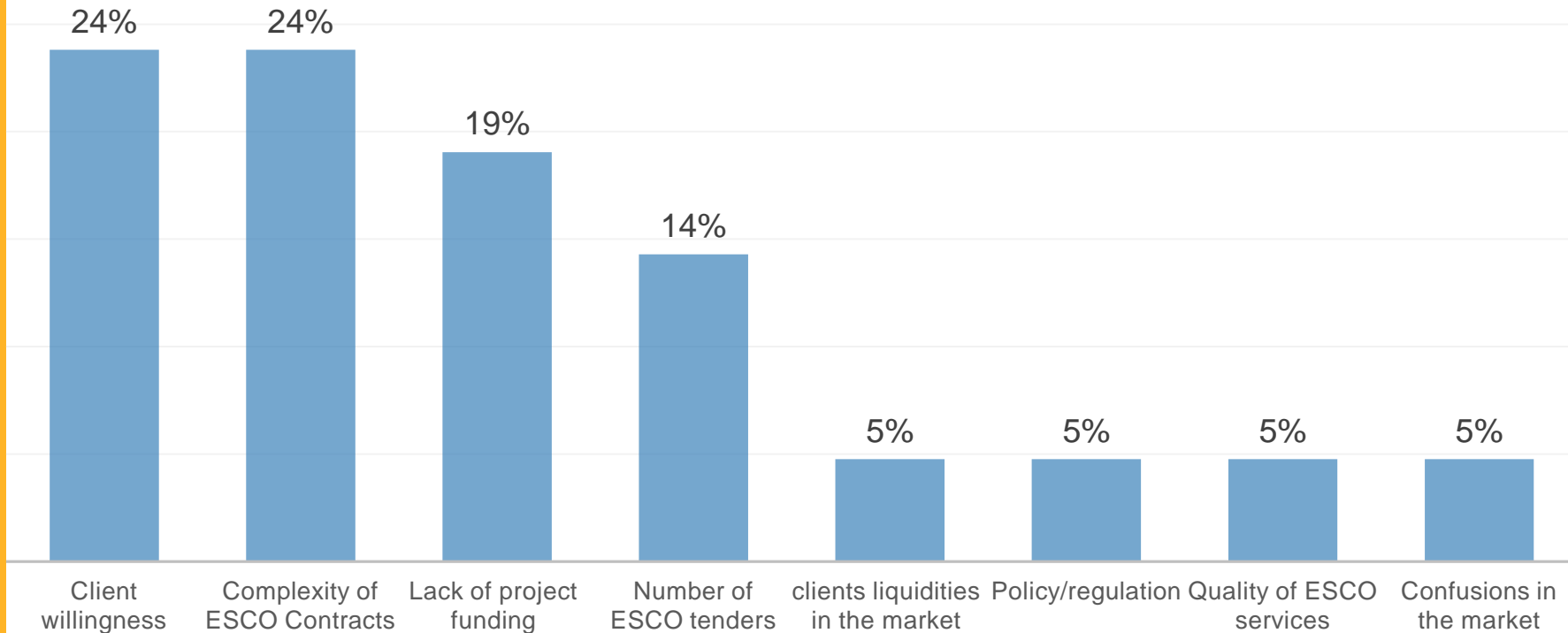


- Saudi Arabi
- Oman
- Bahrain
- Kuwait
- Qatar

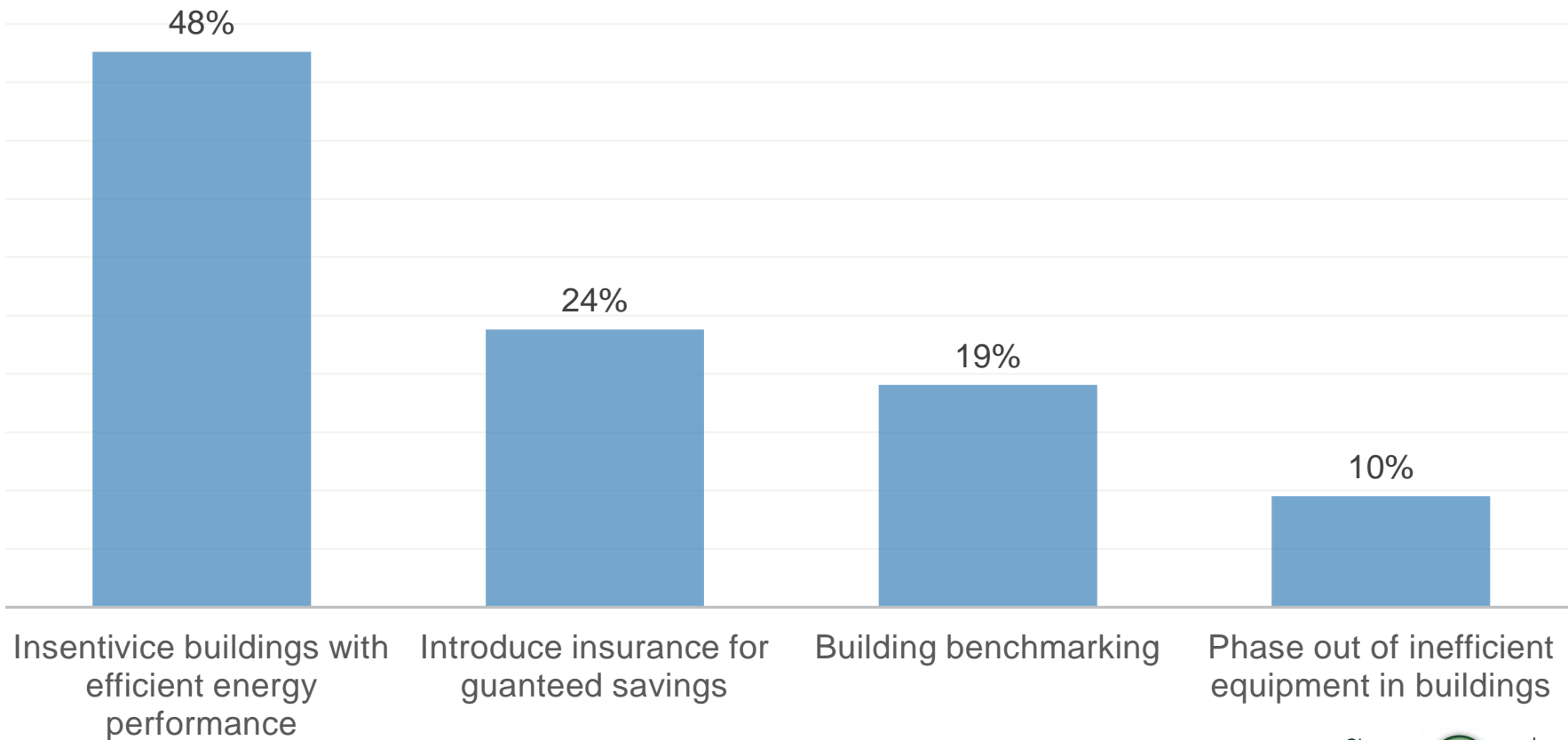
# Business Evaluation & Forecast



# Major Stumbling Blocks



# Initiatives to promote energy efficiency



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# CONCLUSIONS

# Conclusions

- The ESCOs
  - Most of the ESCO have energy services as core business, followed by FM companies.
  - ESCO plan to recruit 117 to 242 people in the next 3 years
- Business Opportunities
  - Majority of the ESCOs evaluate the recent 2 years business as neutral
  - Most ESCOs expect good business opportunities next 3 years
  - ESCO require at least a total of AED 220 million annually to sustain
- Enhancing the ESCO Market
  - Majority of ESCO sees client willingness and complexity of ESCO contracts as main hurdles
  - Most of the ESCOs would like to see incentives for efficient buildings to stimulate energy efficiency

# Thanks you

**Questions & follow-up**

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Or visit CEBC website at

<http://www.cleanenergybusinesscouncil.com>