UNION EUROPEENNE DE L'ARTISANAT ET DES PETITES ET MOYENNES ENTREPRISES
EUROPÄISCHE UNION DES HANDWERKS UND DER KLEIN- UND MITTELBETRIEBE
EUROPEAN ASSOCIATON OF CRAFT, SMALL AND MEDIUM-SIZED ENTERPRISES
UNIONE EUROPEA DELL' ARTIGIANATO E DELLE PICCOLE E MEDIE IMPRESE

The effects of new policies on energy efficiency and renewables on SMEs as providers of specialist engineering services

Most of the value chain for energy efficiency measures and renewables is situated within the European Union. Apart from production, this includes labour intensive activities such as research, installation and maintenance. The number of jobs in this area is growing rapidly. The figure of 300 000 given in the Communication "Limiting climate change to 2 °C – Policy options for the EU and the world for 2020 and beyond" is probably even too low.

In the specialist engineering services industry alone, about 5 % of the jobs depend on the design, installation and maintenance of renewable energy systems including photovoltaic, solar thermal, heat pumps, biomass heating etc., and another 7 % on energy efficiency services, such as building certification, energy advice, implementation of energy efficient solutions etc.
In other words, almost 290 000 jobs in the specialist engineering services industry depend on energy efficiency measures and renewables. Several countries expect the number of jobs in this area to double over the next three years. Given the strong, yet increasing growth rates in many European countries, this prospective appears realistic (see following pages).

The development of energy efficiency services and renewable energy systems led to a technological boost in the specialist engineering services industry. Most of the new jobs require a high degree of qualification and technological understanding. This "knowledge-based" employment increases the attractiveness of the whole industry. In spite of numerous campaigns, enterprises working in this area suffer from a chronicle lack of qualified and motivated workers. This has become a major obstacle to more rapid market growth.
On the other hand, this development requires permanent education and training of market players such as designers, architects, public authorities, contractors and building developers so as to enhance the market acceptance, knowledge and innovation in this area.

Specialist engineering contractors and the opening of energy markets

A competitive and innovative market for renewable energy technologies and energy efficiency services is hardly possible without truly competitive gas and electricity markets.
Integrated energy generation / transmission / distribution companies have access to certain energy-related market information, including consumption patterns of end-users. This information is normally not made available to independent energy efficiency service providers. This provides the integrated energy company with a competitive advantage in the energy efficiency services market.

Furthermore, the lack of competition keeps the market largely closed to independent contractors and services providers. And, if the market is eventually opened up, the vast financial power and reserves - earned over the years through the monopoly position - allows the former monopolies to invest much money and launch wide marketing campaigns for new services. This goes to the detriment of independent contractors and services providers

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who do not have comparable resources. Consequently, independent service providers find it often difficult to access end-users and propose alternative energy choices.

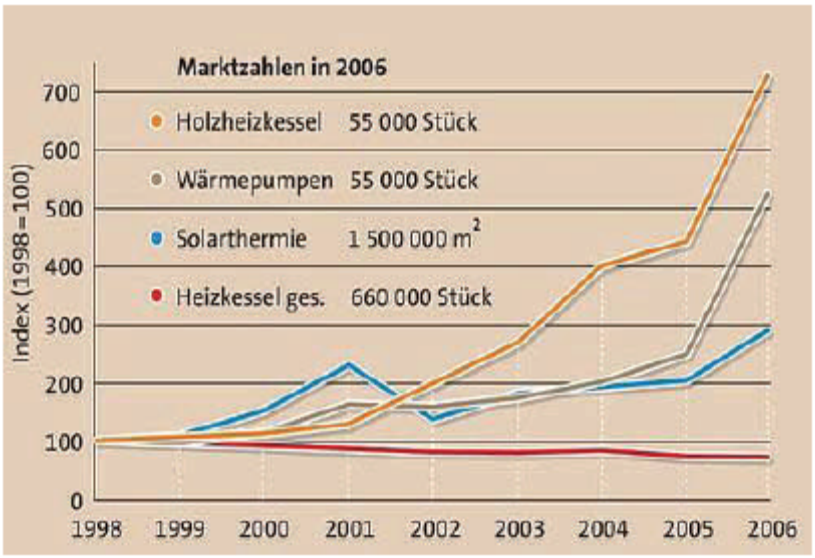
Finally, the current difficulties and problems for new competitors to get access to the network are holding back investors to invest in innovation, new technologies and renewables and harm the confidence of customers in making energy decisions.

Therefore, UEAPME calls for:

- complete ownership unbundling of supply and transmission to encourage investment, innovation and confidence;
- the establishment of a formalised European network (ERGEG+) of national regulators, all of which should be completely independent and dispose of real decision making power.
- an increase in cross-border transmission capacity.

New solar thermal statistics:
Market size in terms of capacity (kW_{th})[1]

	In Operation[2]	Market (=Newly Installed)					Market Growth	Market Forecast
	2004	2002	2003	2004			2004/2003	2005
	Total Glazed (kW_{th})	Total Glazed (kW_{th})	Total Glazed (kW_{th})	Total Glazed (kW_{th})	*Flat Plate (kW_{th})*	*Vacuum Collectors (kW_{th})*	Total Glazed (%)	Total Glazed (kW_{th})
AT	1.459.842	107.135	116.844	127.816	*126.000*	*1.816*	9%	140.000
BE	33.774	3.460	6.333	10.290	-	-	62%	12.600
CH	246.722	18.502	18.774	21.747	*20.932*	*815*	16%	24.500
CY	315.140	21.000	21.000	21.000	-	-	0%	21.000
CZ	30.380	4.200	4.900	5.950	*5.670*	*280*	21%	7.000
DE	3.922.800	378.000	504.000	525.000	*472.500*	*52.500*	4%	595.000
DK	221.011	9.100	13.300	14.000	*13.300*	*700*	5%	15.400
EE	399	35	105	175	-	-	67%	210
ES	294.256	46.200	49.000	63.000	-	-	29%	105.000
FI	8.386	777	1.400	1.400	-	-	0%	1.400
FR[3]	191.870	18.900	27.230	36.400	-	-	34%	52.500
GR	1.978.690	106.400	112.700	150.500	-	-	34%	119.000
HU	2.975	350	700	1.050	-	-	50%	1.050
IE	5.103	613	840	1.400	*840*	*560*	67%	2.100
IT	311.000	31.500	35.000	40.600	-	-	16%	49.000
LT	1.155	210	280	350	-	-	25%	420
LU	8.050	840	1.050	1.190	-	-	13%	1.400
LV	1.155	210	280	350	-	-	25%	420
MT	10.752	1.750	2.100	2.951	*2.858*	*92*	41%	3.990
NL	198.456	21.000	19.380	18.410	-	-	-5%	18.900
PL	71.764	12.600	18.354	23.100	-	-	26%	24.500
PT	101.465	3.850	4.200	7.000	-	-	67%	9.450
SE	130.038	10.682	13.479	14.041	*12.249*	*1.792*	4%	17.500
SI	68.320	840	770	1.260	-	-	64%	1.400
SK	39.725	3.150	3.500	3.850	*3.465*	*385*	10%	4.200
UK	118.944	12.250	15.400	17.500	-	-	14%	21.000
SUM	9.771.471	813.553	990.918	1.110.329	-	-	12%	1.248.940



Figures for Germany

FRANKREICH – HÖHENFLUG DES MARKTS FÜR WÄRMEPUMPEN

Mit 53'510 im Jahr 2006 installierten Wärmepumpen ist Frankreich der zweitgrößte europäische Markt für dieses Heizungssystem geworden, dessen Prinzip darin besteht, die Wärme der äußeren Umwelt (Erde, Wasser, Luft) aufzufangen, um sie im Innern des Gebäudes zu nutzen.

Das Wachstum dieses Marktes ist spektakulär: Laut den Zahlen der AFPAC (Association Française pour les Pompes à Chaleur – Französische Vereinigung für Wärmepumpen), die soeben ihren Jahresabschluss für das Jahr 2006 veröffentlicht hat, beträgt es nicht weniger als 112%.

Von rund 1000 Installationen pro Jahr vor dem Jahr 1997 hat sich der französische Markt auf ungefähr 12'400 Wärmepumpen im Jahr 2002 gesteigert, Luft-Luft-Systeme nicht mitgerechnet. Das im Jahr 2002 erreichte Wachstum hat sich in den Jahren 2005 und 2006 noch einmal erhöht, und zwar dadurch, dass die öffentliche Hand einen Steuerkredit von 40% für das Jahr 2005 und von 50% für 2006 und 2007 zugunsten der Wärmepumpen einführte. Dank dieses Einsatzes der öffentlichen Hand hat sich Frankreich hinter Schweden zum Land mit dem zweitgrößten Marktvolumen Europas auf diesem Sektor entwickelt. Danach kommen Deutschland und dann die Schweiz mit 43'886 beziehungsweise 15'809 Einheiten.

Um diesem exponentiellen Wachstum gewachsen zu sein, müssen sich die Fachkreise organisieren. Die Hersteller erhöhen das Angebot und werden die Marke NF PAC auf den Markt bringen, während die Installateure durch eine „Qualifikationscharta für Wärmepumpen" neue Spielregeln für den Boom festlegen.

	2004 Cumulated power			2005 Cumulated power		
	On-grid	Off-grid	Total	On-grid	Off-grid	Total
Germany	908,000	26,000	934,000	1 508,000	29,000	1 537,000
Spain	23,900	13,400	37,300	37,600	14,200	51,800
Netherlands	44,310	4,769	49,079	45,857	4,919	50,776
Italy	18,700	12,000	30,700	25,200	12,300	37,500
France	8,000	18,300	26,300	12,967	20,076	33,043
Luxembourg	23,200	0,000	23,200	23,266	0,000	23,266
Austria	16,493	2,687	19,180	21,126	2,895	24,021
United Kingdom	7,386	0,778	8,164	9,786	0,878	10,664
Greece	1,257	3,288	4,544	1,412	4,032	5,444
Sweden	0,194	3,672	3,866	0,254	3,983	4,237
Finland	0,193	3,509	3,702	0,223	3,779	4,002
Portugal	0,500	2,200	2,700	0,600	2,700	3,300
Denmark	2,035	0,255	2,290	2,335	0,295	2,630
Belgium	1,210	0,053	1,263	1,712	0,053	1,765
Cyprus	0,255	0,090	0,345	0,490	0,135	0,625
Czech Republic	0,269	0,147	0,416	0,380	0,150	0,530
Poland	0,069	0,165	0,234	0,085	0,232	0,317
Ireland	0,000	0,100	0,100	0,000	0,300	0,300
Slovenia	0,006	0,094	0,100	0,118	0,098	0,216
Hungary	0,055	0,083	0,138	0,085	0,091	0,176
Slovakia	0,000	0,060	0,060	0,000	0,060	0,060
Lithuania	0,000	0,017	0,017	0,000	0,017	0,017
Malta	0,006	0,000	0,006	0,015	0,000	0,015
Latvia	0,000	0,004	0,004	0,000	0,005	0,005
Estonia	0,000	0,002	0,002	0,000	0,003	0,003
Total EU	**1 056,038**	**91,673**	**1 147,710**	**1 691,511**	**100,201**	**1 791,712**

Source: EurObserv'ER 2006

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