

LBNL/NAESCO ESCO Database



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Overview of Presentation



- Intro to LBNL/NAESCO ESCO Database
- Types of reports available
- Upgrade database to EPARS
- Examples of data from ESCO industry survey
- Next survey
- Discussion of survey question for SEOs

LBL ESCO Database Project



Project partners

- 10+ year partnership between LBNL/NAESCO
- Voluntary agreement from ESCO industry and government agencies (some SEOs, FEMP) to provide project data
- Core funding currently provided by DOE OWIP and FEMP; other DOE offices (e.g., OE) have provided support.

Project objectives

- Track ESCO industry and market trends; project performance; market activity
 - Analyze trends in savings; investment levels; customer preferences; and market penetration of EE/DG technologies
 - Objective information resource on ESPC and ESCO industry.
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Database Content



- 4,100 projects in 49 states representing about \$10B in total investment (~ 20% of the total industry activity since 1990)
 - ~ 15% of the database came from publicly-available sources including state energy offices and FEMP (~300 projects are from state energy offices)
 - The NAESCO accreditation process (~85% of database) requires that ESCOs report over two dozen types of information for each project
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Available Reports



- **ESCO industry survey**
 - Every 2-3 years; Industry size, growth and trends
 - **Detailed analysis of ESCO database**
 - Every 3-4 years; Project-level performance, activity, and long-term trends
 - **Special projects and emerging topics**
 - US DOE benchmarking “one-pagers”; Research into the non-energy benefits of ESCO projects; Studies of market penetration and potential
 - **Response to *ad hoc* questions**
 - 1-2 per week from a variety of public and private stakeholders
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ESCO Project Analysis and Reporting System (E-PARS)



Project Objectives

- Deliver reporting that users need
- Provide *easier* access to ESCO database results
- Standardize collection of ESPC performance data
- Facilitate performance benchmarking between proposed ESPC projects and historic public sector project information – using normalized data
- Collaborate with State Energy Offices to assist their efforts to simplify collection and reporting of ESPC project information



LBNL Project Team

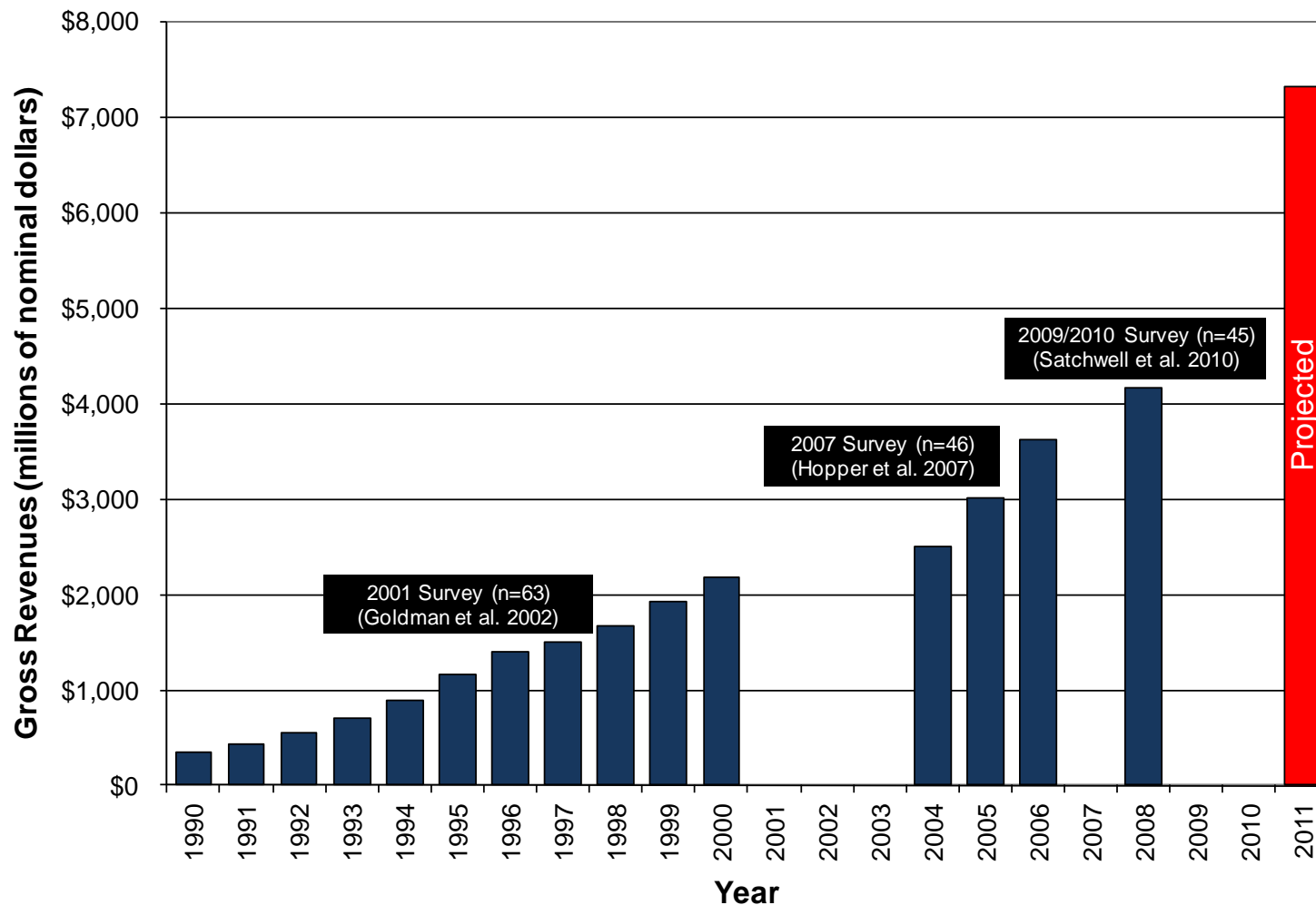
- Pete Larsen (Lead), Chuck Goldman, Phil Coleman, Liz Stuart, and staff from Computational Research Division

Sample Survey Report Data

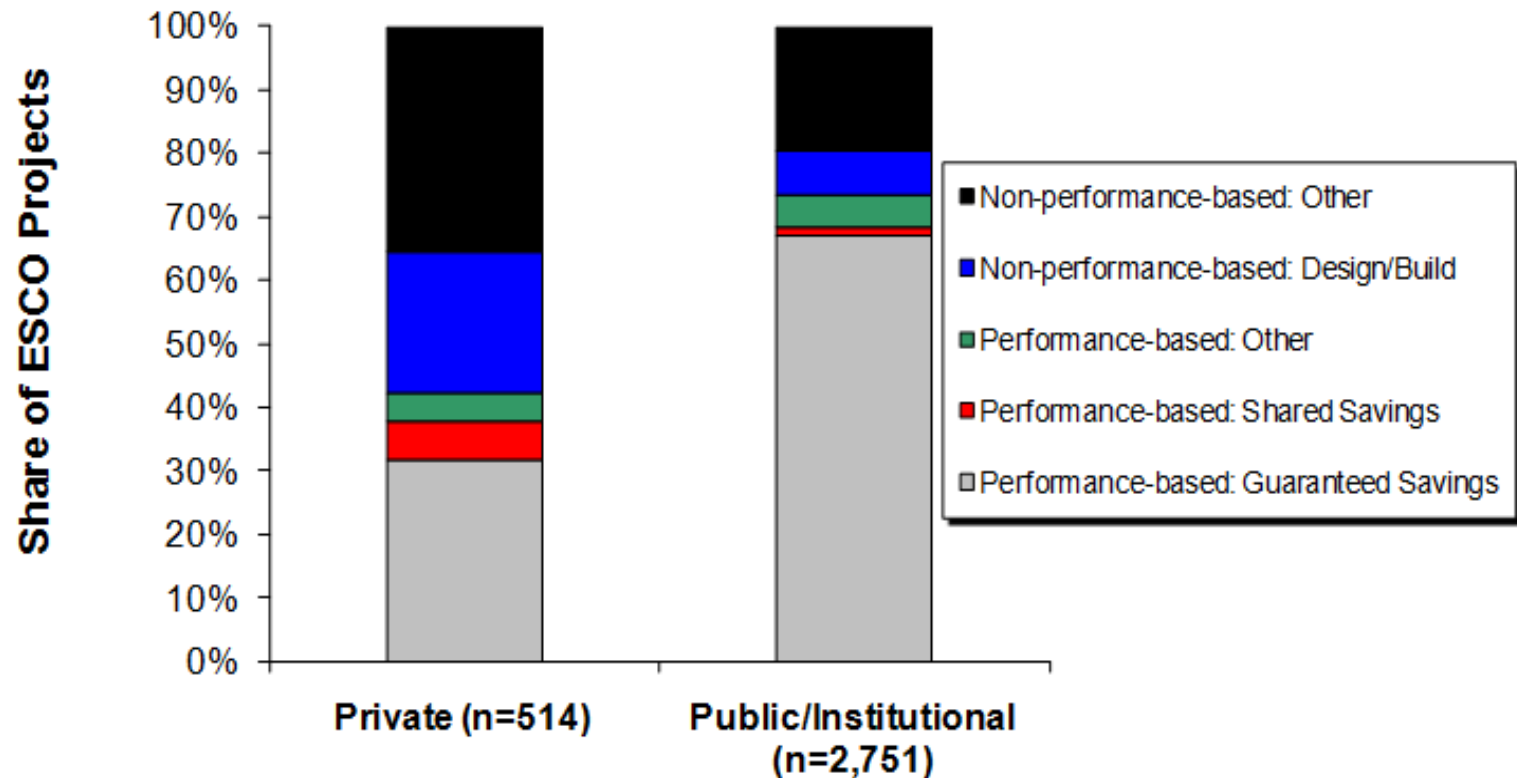


- Size and growth of ESCO industry
- Typical contract types
- Retrofit strategy trends

Size of U.S. ESCO Industry



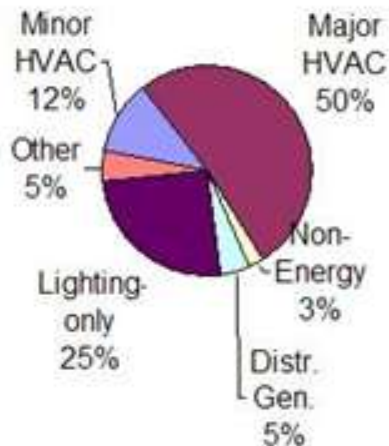
Typical Contract Types



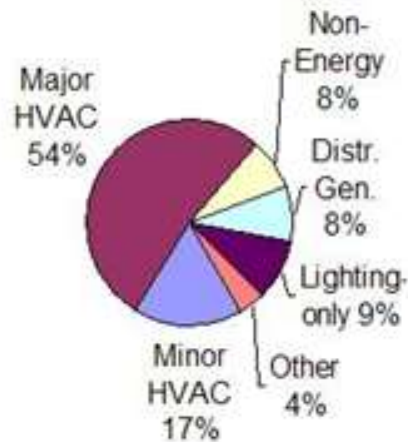
Retrofit Strategy Trends

- In public sector, major HVAC remains dominant strategy
- Share of lighting-only projects has declined significantly over time
- Share of projects with onsite generation increasing

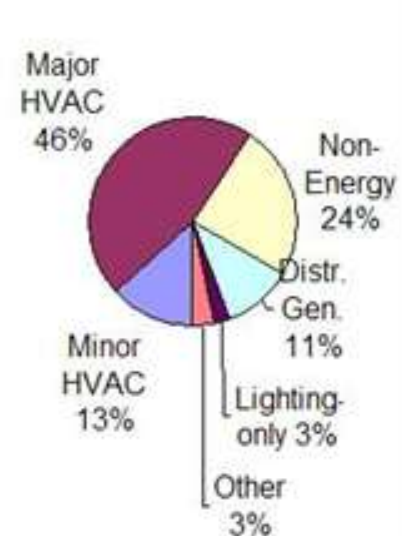
1990-1997 (n=464)



1998-2004 (n=1,467)



2005-2008 (n=656)



Survey Work This Fall



- 2012 ESCO industry survey
- One question for SEOs
 - US DOE request
- Estimate size of remaining market
 - Crowdsourcing methodology
- Discussion of draft question (handout)

Questions or Feedback?



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- Pete Larsen, LBNL

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- URL for reports

- http://google1.lbl.gov/search?q=naesco&site=ALL&btnG=LBNL+Google+Search&entqr=0&sort=date%3AAD%3AL%3Ad1&output=xml_no_dtd&lr=&client=default_frontend&numgm=5&ud=1&oe=UTF-8&ie=UTF-8&proxystylesheet=default_frontend