



COWI

Competitiveness of Corporate Sourcing of Renewable Energy

Kick-off workshop, CEPS - 31 May 2018

Outline of the presentation

- Objectives and scope of the Study
- Stakeholders' role
- Next steps

Objective and scope

Research questions

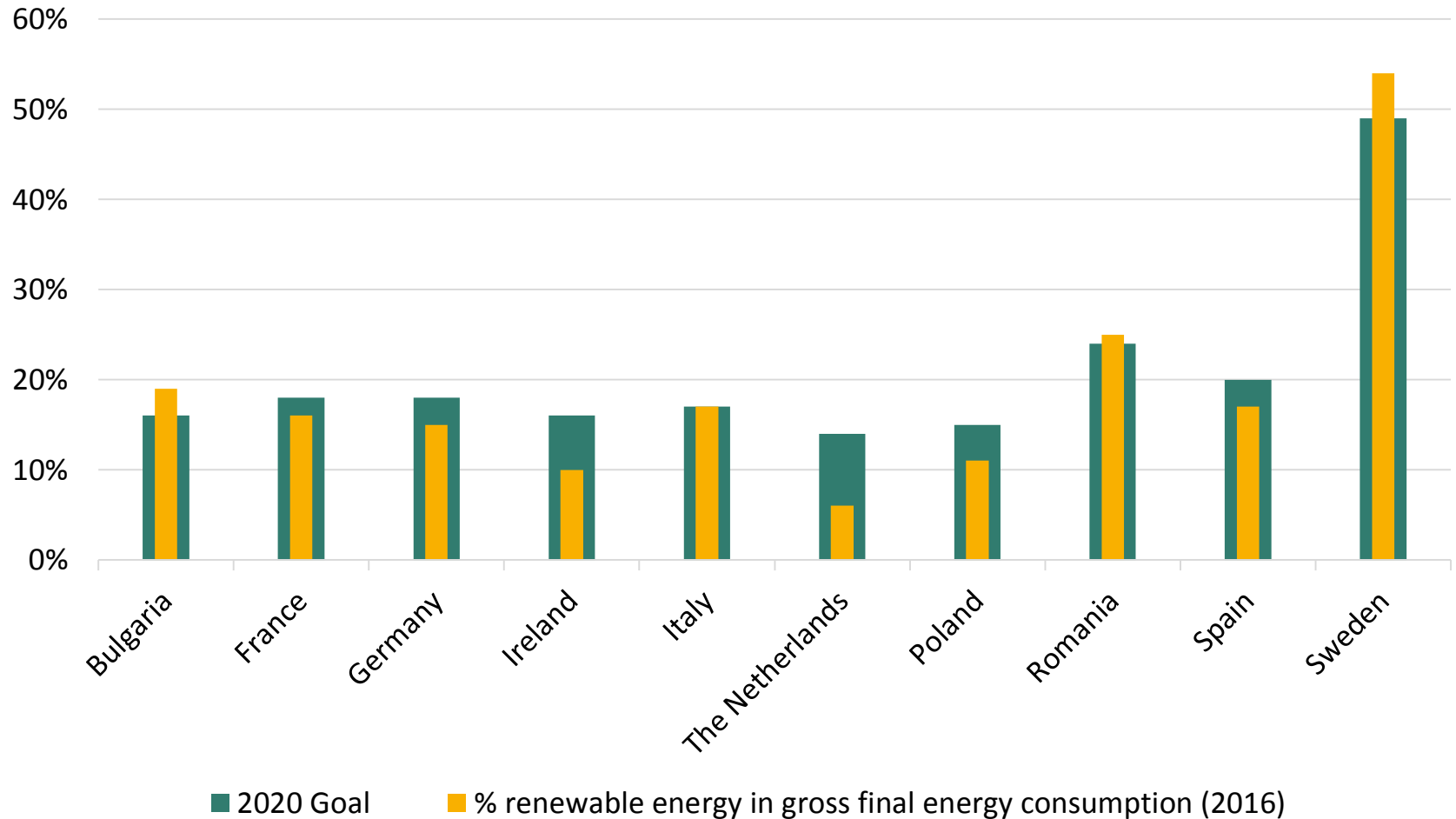
- What are the drivers of, and constraints to, corporate sector's transition to renewable energy?
- What is the impact of renewable energy on the competitiveness of EU companies?

Scope

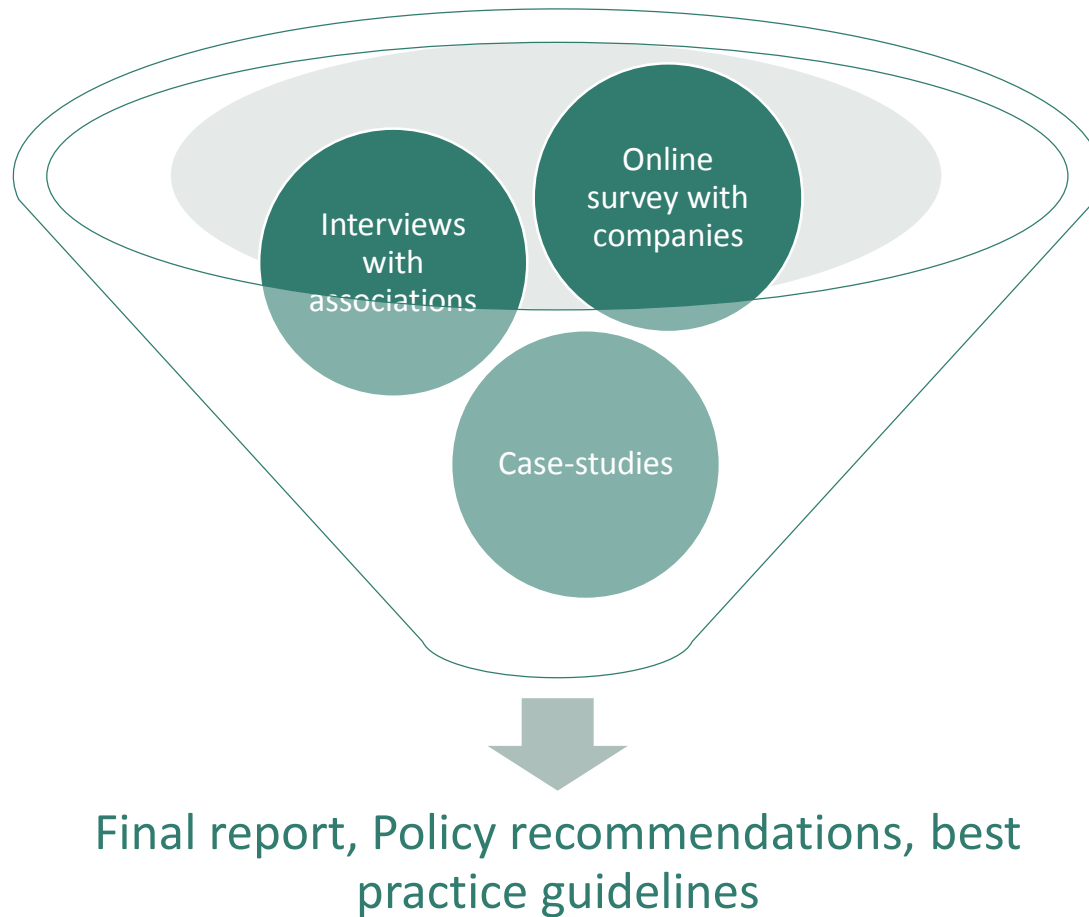
- Mainly RES-E but open to feedback on RES-HC
- Selected sectors (energy intensive industries, large electricity users with a low power intensity, other sectors attentive to CSR) but open to broaden the scope
- 10 Member States

Objective and scope

Member States



Stakeholder consultation



Stakeholder consultation Interviews

Target group

- EU associations
- National associations (10 Member States)

Tool

- Semi-structured interviews
 - Face-to-face (in Brussels) or via phone/web
 - Open-ended questions
 - Interview guidelines shared in advance (in English)
 - Interview can be held in other EU languages, upon request



June 2018

July 2018

Stakeholder consultation

Online survey

Target group

- Companies operating in the EU (ideally in the 10 Member States)
 - Companies sourcing RE, aspiring to source, not sourcing
 - Companies invited by CEPS/COWI and by associations

Tool

- Online survey (SurveyMonkey®)
 - 15 minutes
 - Closed-ended questions, use of Likert-type scale, optional comments
 - No sensitive information, data confidentiality protected
 - Translation upon request in selected EU languages
 - Help desk to provide guidance

July 2018

September 2018

Stakeholder consultation

Example – Opportunities

Impact on competitiveness (see competitive advantage, i.e. the ability to acquire and maintain a favourable position in the market thus outperforming competitors):

- Cost leadership (reducing energy expenses and cutting production costs)
- Resilience (price stability, predictability and security of energy inputs)
- Regulatory compliance (compliance with climate change and environmental legislation)
- Differentiation (corporate social responsibility, environmental sustainability, green consumers and investors)

Stakeholder consultation

Example – Challenges

Barriers depending on both internal and external factors:

- Limited in-house skills and expertise (especially for SMEs and for options other than green grid electricity)
- Company culture and corporate social responsibility (otherwise ROI below company targets)
- Financial barriers (especially for self-generation)
- Limited skills and expertise available on the market
- Lack of suitable projects (no on-site/near site projects and higher risk for financial PPAs with generators in other regions/countries)
- Infrastructural barriers (interconnection capacity between MS, investment for integrating decentralised RE installations in the grid)
- Regulatory barriers (permits for self-generation, rules for grid connection, legal restrictions to PPAs, restrictions to long-term contracts, regulated components of the electricity bill, limited options for GOs in some MS, etc.)
- Policy uncertainty (higher risk for long-term commitment)

Stakeholder consultation

Online survey - Pilot experiment

Target group

- Very small group of companies/associations
 - Different corporate sourcing methods
 - Different sectors
 - Different Member States

Objective

- Test the online survey (SurveyMonkey®)
 - No need to complete the survey but give feedback
 1. Questions are easy to understand
 2. Adequate coverage of the issue at stake
 3. Survey can be completed in a reasonable amount of time
 4. No confidentiality concerns



June 2018

Stakeholder consultation

Case studies

Target group

- 6 companies
 - Three leading companies, three SMEs
 - Three different types of renewable technologies
 - Different corporate sourcing methods
 - Different sectors
 - Different Member States
 - Cross-border dimension (possibly)

Tool

- Semi-structured interviews



September 2018

November 2018

Stakeholder consultation

Case studies

Outline

1. Introduction – Why this case study
2. Sector – Understanding of the sector where the company operates
3. Country – Brief country background analysis
4. Company - Description of the company under analysis
5. RE procurement method – Selected approach to source RE
6. RE technology – Selected RE technology to generate RE
7. Drivers of the company decision to source RE – Why/how they have decided to source RE
8. Benefits – Expected/actual impact on business competitiveness
9. Barriers – Obstacles to overcome in order to source RE, including regulatory barriers and costs
10. Policy recommendations – How to reduce barriers to/maximise benefits of corporate sourcing of RE

Next steps

Associations

- Bilateral meetings (June 2018)
- Companies for the pilot experiment (June 2018)
- Companies for the online survey (June 2018)
- Interviews (June-July 2018)

Companies

- Pilot experiment (June 2018)
- Online survey (July-September 2018)
- Case-studies (September-November 2018)

Validation Workshop (September-October 2018)

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Thank you for your attention.



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