

Energy as a Service Market by Type (Energy Supply Services, Operational and Maintenance Services, and Energy Efficiency and Optimization Services) End-User (Commercial and Industrial) and Region - Global Forecast to 2027

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Abstracts

The energy as a service market is projected to reach USD 105.6 billion by 2027 from an estimated USD 64.7 billion in 2022, at a CAGR of 10.3% during the forecast period. Due to the manufacturing advances and various technological improvements, the costs of various renewables and storage systems such as solar PVs, fuel cells, grid-based energy storage, especially batteries, and combined heat and power declined significantly in the recent times. The decreasing costs of solar PV are encouraging users to install these resources for generating electricity. These decreasing prices of the renewables and storage solutions have positively promoted the energy as a service approach as it is helping the utilities implement the same and helping various end-users reduce their energy costs. Also, with the price volatility found in today's fossil fuels markets, unpredictable prices are costing the government substantially more than lower cost alternatives. For instance, solar power can be generated and used during peak times to offset the costly high-demand electricity mentioned above. The use of solar power can not only reduce the overall electricity usage but also helps avoid demand charges. Hence, all factors are making these options more viable and affordable.

The deployment of various renewable energy sources has its own technical and feasibility considerations. They also have some capacity constraints such as restricted supplies of basic raw material inputs, limitations on manufacturing capacity, competition for larger construction project management and equipment, and limited trained workforce. Environment clearances and land acquisition have been the major issues for the delay in project execution. For instance, if a customer has already deployed smart

lighting, an energy as a service provider could face trouble integrating the same with their platform for analyzing and automating the same using their proprietary platform. Hence, there is a need for a streamlined business process, effective controls, and transparency. In addition, several diverse and emerging technologies, such as connected devices and monitoring platforms, need to communicate . seamlessly with each other to achieve energy cost savings through constant monitoring and automation.

“The energy supply services segment, by type, is expected to be the fastest growing market from 2022 to 2027”

There are three types of services are considered in the report energy supply services, operational and maintenance services and energy efficiency and optimization services. Energy supply services refer to the idea where a building’s energy requirements are taken care of by an outside company, typically utilities or service providers. Energy supply services protect end-users from grid blackouts and weather extremes that would threaten the operations of a traditional grid connected commercial and industrial entities. In energy as a service operation, energy supply services are increasingly delivered through Energy Services Agreements (ESAs) that are performance-based contracts through which a service provider agrees to finance, develop, and deploy renewable energy projects for clients without any upfront capital expenditures. In addition to this, consumers do not have any responsibility to maintain and upgrade the equipment.

“The commercial segment, by end-user, is expected to be the largest market from 2022 to 2027”

The end-user segment have two types includes commercial and industrial end-users. The commercial segment includes establishments such as healthcare, educational institutions, airports, data centers, leisure centers, warehouses, hotels, and others. Electricity prices for the commercial sector are higher than the industrial sector. Hence, customers are looking for a solution that helps them implement energy-efficiency projects with no capital expenditure and validate energy savings. Therefore, increase in the energy consumption demand and commercial energy prices is expected to drive the segment.

“North America: The largest and the fastest growing region in the energy as a service market”

North America is expected to dominate the global energy as a service market and is

expected to grow at the highest CAGR between 2022–2027. One of the major drivers for the energy as a service business model in the region is the ability to incorporate technology, analytics, and personalized services for end users. North America’s electrical transmission infrastructure is not upgraded for modern threats and natural hazards. Energy as a service would provide the reliability and flexibility that would enable expanded use of electricity across the region without getting affected by threats and hazards.

Breakdown of Primaries:

In-depth interviews have been conducted with various key industry participants, subject-matter experts, C-level executives of key market players, and industry consultants, among other experts, to obtain and verify critical qualitative and quantitative information, as well as to assess future market prospects. The distribution of primary interviews is as follows:

By Company Type: Tier 1- 40%, Tier 2- 35%, and Tier 3- 25%

By Designation: C-Level- 30%, D-Level- 20%, and Others- 50%

By Region: Asia Pacific– 60%, North America – 10%, Europe – 18%, Middle East & Africa – 8%, and South America– 4%

Note: “Others” include sales managers, engineers, and regional managers

The tiers of the companies are defined based on their total revenue as of 2021: Tier 1: >USD 1 billion, Tier 2: USD 500 million–1 billion, and Tier 3:

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*Details on Business overview, Products/services/solutions offered, Recent Developments, MNM view might not be captured in case of unlisted companies.

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