

PV Commercial & Industrial EPCMonitor[©] 2024

First-hand Insights from EPCs and Project Developers

Comprehensive analysis & Potentials of Top 6 EU markets

EUPD Research | June 2024



22+
YEARS
EUPD Research

Importance of the C&I Market

Segment Size

Industrial and commercial consumers account for nearly 40% of the EU's total energy consumption. Large volumes of new renewable energy capacity are on the anvil due to voluntary commitments and regulatory mandates to decarbonize.

Project Size

Higher consumption needs and possibilities of aggregating demand translate to larger and more profitable project sizes. This allows all stakeholders to benefit from economies of scale.

Sector Coupling

Corporate consumers often require more than just renewable electricity. ESG and net-zero mandates encompass transportation, supply chains, and non-electric processes. This broad scope provides further decarbonization opportunities and opens new business avenues.

Background

The commercial and industrial (C&I) segment stands at the forefront of the energy transition, actively adopting renewable energy technologies, particularly solar, to drive decarbonization efforts.

In Europe, favorable policies, mandatory regulations, and robust voluntary commitments have elevated the C&I segment to a position of paramount importance within the renewable energy industry.

Overview

In 2024, EUPD Research is closely examining the PV C&I market to thoroughly analyse its key requirements and its role in decarbonization. Through a comprehensive report and subsequent networking opportunities between buyers and sellers, the goal is to contribute to the acceleration of the C&I energy transition.

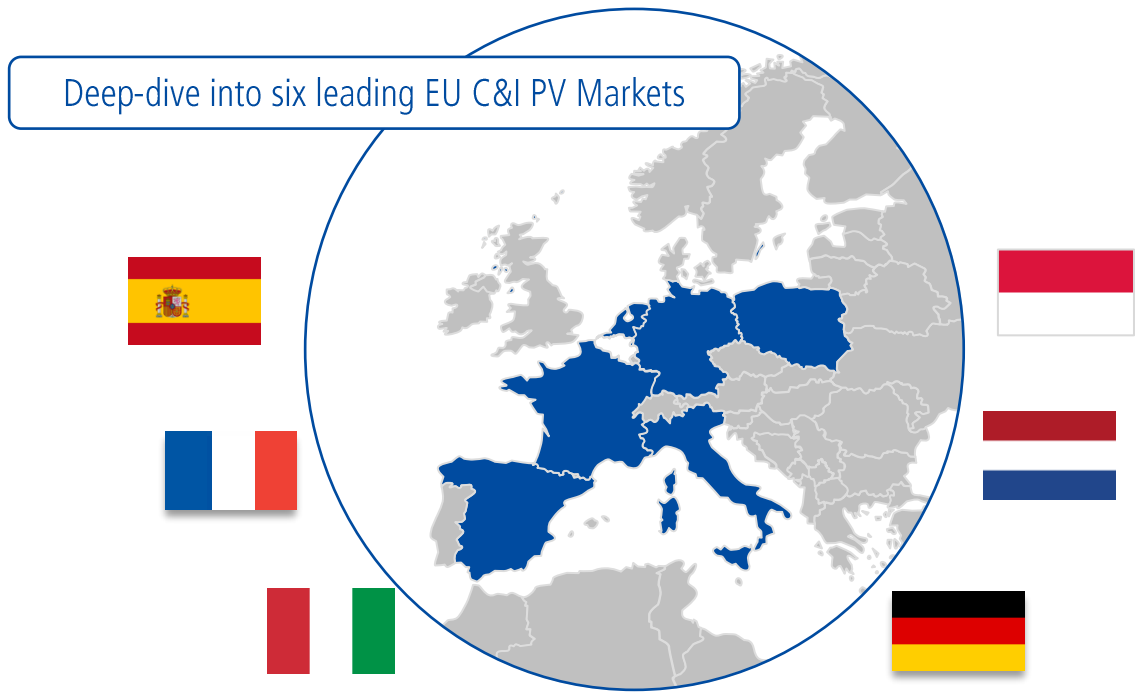
The **PV Commercial & Industrial EPCMonitor® 2024** report will support EPCs and project developers in estimating market size, analyzing competitive landscape, understanding consumer requirements and market trends, policy landscape and subsequently, adapting strategies and refining business models.

EUPD Research will also identify most impacting service providers through the **Top Brand© C&I - EPC/Project Developer Awards**, recognizing excellence and highlighting top performers to C&I consumers.

Additionally, EUPD Research will facilitate **networking opportunities**, fostering idea exchange and establishing connections between buyers and sellers enabling new business opportunities.

PV Commercial & Industrial EPCMonitor[©] Coverage

Germany, Spain, Poland, Italy, France and the Netherlands



Country specific deep-dives
Installed capacities and forecasts

Analytics on preferred brands and technologies

Competitive landscape showcase
Business models – current and evolving

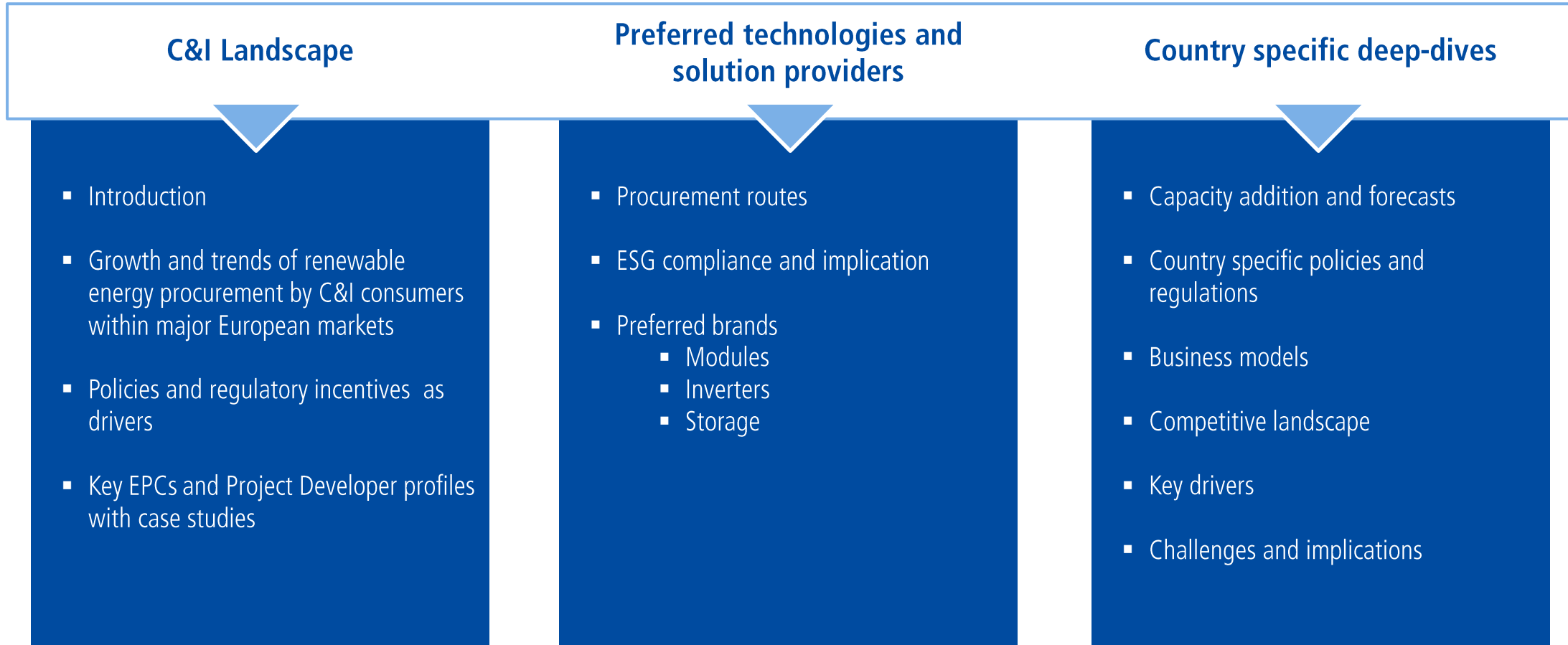
Profiles and analytics of leading EPCs
Innovative case studies

Policy and regulatory frameworks assessments

Key drivers, barriers and challenges
Implications for successful future business strategies

Focus of PV Commercial & Industrial EPCMonitor[©] 2024

The study will focus on specific understanding of needs and requirements of corporate (C&I) market based on first-hand primary data from EPCs and Project Developers as well as EUPD Research's extensive in-house policy and pricing databases



Benefits of the PV Commercial & Industrial EPCMonitor[©] for EPCs and Project Developers

- Market trends, outlook and analysis of potential C&I market size
- Competitive landscape – most impacting EPCs and Project Developers
- Key product and service offerings of peers
- Business models preferred by consumers
- Technology and brands preferred by consumers
- Policy landscape and economic implications for C&I capacity addition
- Decarbonization goals and trajectories of C&I consumers
- ESG mandates, clean supply chain needs and implications for equipment suppliers

Succeed in the C&I Segment's Energy Transition Story

EUPD Research's extensive C&I consumer network can further increase your brand's reach

Unlock the potential of EUPD Research's C&I consumer network!

With a 20+ year track record and expertise in the ESG and Corporate Health domain, EUPD Research boasts a strong C&I customer network and unparalleled access. Over 5,000 entities have already engaged with us through EUPD's internationally recognised Corporate Health and ESG awards.

The extensive database comprises over 25,000 C&I consumers, including their dedicated sustainability divisions tasked with making crucial decisions regarding renewable energy procurement.

Corporate Health Award



ESG Transparency Award



Showcase your expertise in the C&I market



An Extract of the PV Commercial & Industrial EPCMonitor[®] will be circulated to EUPD Research's C&I consumers database (with 25,000+ sustainability decision makers). Contents of the extract (40+ pages):

- EU-27 Solar PV Status and Outlook: capacity addition, market size and potential
- Country level overview for 6 countries
 - C&I Market share in capacity addition
 - Country level challenges, policies and opportunities
 - Country specific forecast and outlook

Your company's profile and/or best-practice case study can be a perfect fit with the Extract of the PV Commercial & Industrial EPCMonitor[®].

Attention EPCs or Project Developers:

You can showcase your unique service offerings or highlight an innovative best-practice example of a commissioned project. The accompanying international MarCom campaign ensures that your strength is effectively communicated to you future customers!

Interact with stakeholders across the C&I market spectrum

The European Sustainability Week is organized by EUPD Research/ EUPD ESG. This comprehensive three-day conference, award ceremony and C-suite business matchmaking event provides a unique platform to discuss the latest national and international sustainability developments

On Day 2 of the European Sustainability Week, the ESG Summit 2024 offers attendees a chance to expand their knowledge across the international value chain, make valuable contacts and learn from industry leaders.

A special highlight this year is the exhibition area for solution providers, which enables participating companies to discover innovative approaches and products in the field of sustainability.

ESG Summit 2024

Venue: Steigenberger ICON Grandhotel & Spa Petersberg

Date: 11 December 2024

Participate in the event

- Meet prospective C&I clients and highlight your business acumen
- Interact with peers to learn latest trends and outlooks



PV Commercial & Industrial EPCMonitor[©] 2024 – Special June-July 2024 Offer

Hereby we order (please tick):

Product and services	Price
<input type="checkbox"/> PV Commercial & Industrial EPCMonitor [©] 2024 Report	11,500 €
<input type="checkbox"/> Featured one-page profile in Executive Summary of the PV Commercial & Industrial EPCMonitor [©] 2024. Executive Summary will to be circulated, for free, directly to database of 25,000 C&I consumers*	6,000 €
<input type="checkbox"/> Combined offer – featured one-page profile in Executive Summary of the PV Commercial & Industrial EPCMonitor [©] 2024 + PV Commercial & Industrial EPCMonitor [©] 2024 (Full Report)	15,500 €
Please note: Payment terms: 100% upon order. All prices net – VAT may apply. *Limited spots available on first-come-first served basis	

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Phone: _____

E-Mail: _____

Tax-ID: _____

We accept the general terms and conditions (page 18-19)

Signature: _____

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Hereby we order (please tick):

Product and services
<input type="checkbox"/> We are interested in participating in ESG Summit 2024 <ul style="list-style-type: none">• Panellist/presenter slot at the conference• Exhibit space• Logo display• Access to delegate list• Attendee passes• And much more.
If you have selected this option, we will share the sponsorship packages available with you separately.
Please notice: Payment terms: 100% upon order. All prices plus VAT and travel expenses.

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About EUPD Research



>6,000
media contacts

>70
country markets

>10,000,000
analyzed data points

>500
events

>70
professionals employed

>400,000
interviews

>15
nationalities in the teams

>1,000
publications

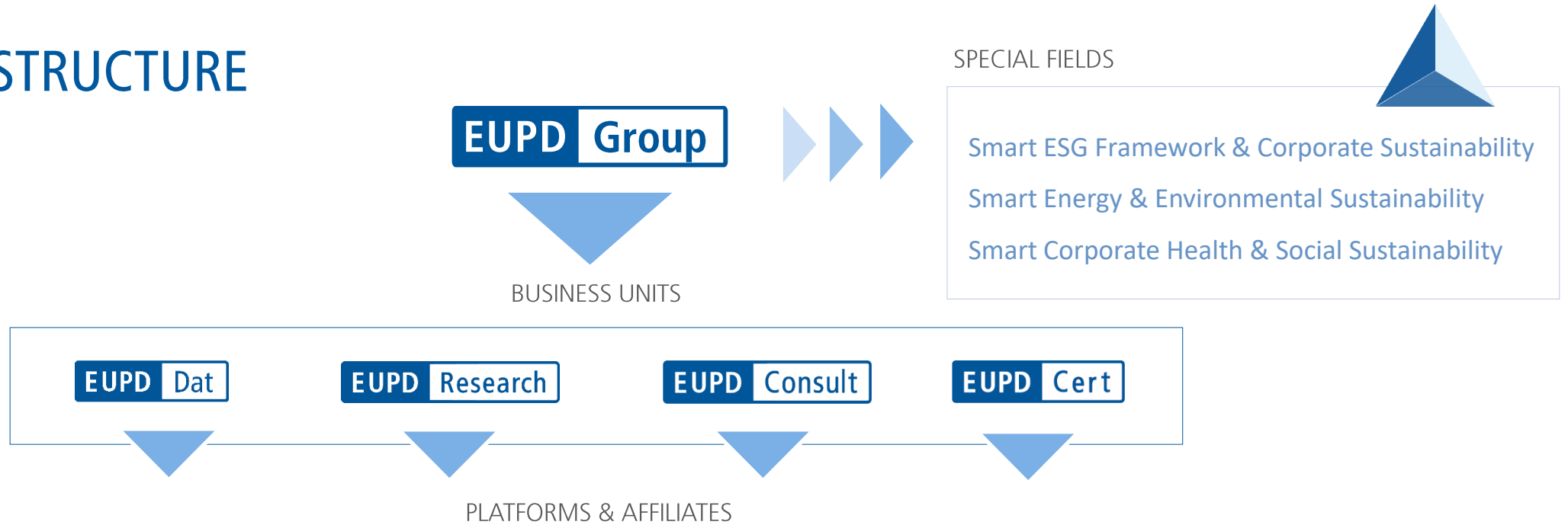
>23
years in the market

>10,000,000
media impressions

>200,000
qualified buying center

>25
industries handled

COMPANY STRUCTURE



EUPD Energy Portfolio

EUPD Research

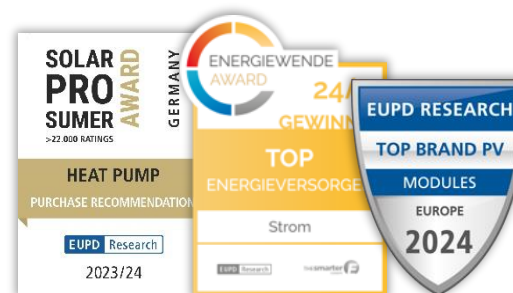
Reports

- [Global Energy Transition GET-MATRIX[©]](#)
- [Electrical Energy Storage Report Europe[©]](#)
- [PV InstallerMonitor[©] | EES InstallerMonitor[©]](#)
- [EV Charging Stations InstallerMonitor[©]](#)
- [Heat Pump InstallerMonitor[©]](#)
- [SolarProsumerAward[©]](#)
- [PV Commercial & Industrial EPCMonitor[©]](#)
- [PV Price & Inventory Tracker[©] | EES Price & Inventory Tracker[©]](#)
- [Market Leadership Study: EU[©]](#)
- [Market Leadership Study: The United States[©]](#)
- ...

EUPD Cert

Certification

- [Top Brand PV](#)
- [Top Brand PV - EPC & Project Developers](#)
- [Top Brand PV Installer Award](#)
- [Top Innovation Award](#)
- [Customer Satisfaction Seal](#)
- [Energy Transition Award](#)
- [SolarProsumerAward](#)



EUPD Consult

Exclusive Consulting

- Within the scope of strategic consulting projects, we focus on the review, further development or redevelopment of the company's orientation, we rethink concepts, measures or the positioning within the competitive environment and shape growth paths and business models
- Our future-oriented consulting services analyze both the corporate environment and the fundamental objectives of the client

REFERENCES (EXTRACT)

AEG

APsystems
ALTERNATIVE ENERGY POWER

DAHSolar

e-on

DMEGC
S O L A R

SMA

houmiles

ENERGY STORAGE
E3 DC

AIKO

IBC
S O L A R

Vaillant

Jinko Solar
We Build Your Trust in Sun

SUNTECH

qcells

Trina solar

ENPHASE

LONGI

SHARP

KOSTAL

VARTA

Enpal.

BayWa r.e.
renewable energy

JASOLAR

SUNGROW
Clean power for all

ASTROENERGY

LG

MENNEKES®

HUAWEI

SENEC

BYD

zolar

risen

krannich
Solar

GROWATT

memodo

sonnen

VIESSMANN

REC

SAMSUNG

**1KOM
MA5°**

SUNPOWER®

Heckert Solar
Die Energiekompetenz

SOLAX
POWER

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Imprint

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Website



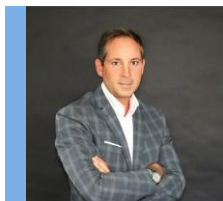
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General terms and conditions of business 1/2

1. Scope

1.1 All contracts between EUPD Research Sustainable Management GmbH (hereafter EUPD GmbH) - and the customer shall be subject to the following terms and conditions only. The customer's terms and conditions of business shall not be applicable and shall not put EUPD GmbH under any obligation to comply unless EUPD GmbH explicitly gives written acknowledgment and acceptance of such conditions.

1.2 Offers are aimed exclusively at commercial clients, that is, companies according to Article 14 BGB (German Civil Code). Private customers, that is, customers according to Article 13 BGB, are not permitted to place legally binding orders based on the aforementioned. Interested private customers should contact EUPD Research by telephone for information on how to place a non-commercial order. Furthermore, the legal right to return items as stated in consumer protection law does not apply to orders placed by commercial clients but does apply to orders placed by private customers.

2. Offer and Ordering Process

2.1 The presentation of the products together with the order form does not constitute a legally binding offer. Offers are subject to the written confirmation of EUPD GmbH. They are designated for the internal use of the customer only.

2.2 The purchaser places a binding offer for the product of choice when all relevant purchase details have been given and the general terms and conditions of business accepted. This will be confirmed immediately by email or fax sent to the address given by the customer. The contract to purchase between the purchaser and EUPD GmbH is valid from when the order is confirmed, or, the products are delivered either by mail or download.

3. Scope of Services, Remuneration and Prices

3.1 Services offered include but are not limited to the following:

a. Multi-Client-Services: client-independent studies for an indefinite number of customers.

b. Shared-Services: commissioned study on behalf of a limited number of customers for the exclusive purchase of those customers.

c. Exclusive-Services: assignments carried out on behalf of a single customer who will have the exclusive license to use the product but only for an individually negotiated period of time. This exclusive license will be for a period no longer than 12 months. After a period of no longer than 12 months it will become a non-exclusive license.

3.2 The prices are net prices in Euros. They do not include sales tax/VAT or delivery costs. Sales tax/VAT will be added to the net costs according to the legally defined percentage. The prices valid at the time of ordering are binding.

3.3 Travel expenses incurred for EUPD GmbH workshops either provided in combination with studies or booked separately are not included in the scope of the offer. Prices have to be paid separately by the customer. This does not apply if it is explicitly agreed that the workshop or the resulting travel expenses for the workshop are part of the negotiated contract and thus do not have to be paid separately.

3.4 Should circumstances arise beyond the control of EUPD GmbH which impose a temporary hindrance on the provision of services, then services and delivery appointments agreed on will be extended. Customers will be informed of any such event or other delay immediately

4. Terms of Payment and Delivery

4.1 Payment is to be made to the amount and method stated in the contract. Any addition and/ or aberration require the written confirmation of EUPD GmbH in order to be effective

4.2 Payment is generally to be made upon receipt of invoice. The products will be shipped as soon as full payment has been made to the account of EUPD GmbH.

The terms and conditions for payment and delivery of Shared- Services and Exclusive-Services are stipulated in the binding offer.

4.3 Delivery costs depend on the quantity of products ordered, their destination as well as type of delivery. There are no delivery costs for products which can be downloaded. The customer accepts that any fees or charges owed for customs or non-EU addresses will not be paid by EUPD GmbH nor is EUPD GmbH liable for them.

General terms and conditions of business 2/2

4.4 The method of delivery, route and company employed to deliver will be chosen by EUPD GmbH at their sole discretion. Once the purchaser has taken delivery of the item from the delivery service, the purchaser is responsible for the item. The company responsible for delivery is to be made aware of any damage sustained in transit immediately. These damages are also to be reported to EUPD GmbH immediately. Part deliveries are permissible where appropriate.

4.5 EUPD GmbH retains ownership of all goods and all licensing rights pertaining to the usage of data files as well as intellectual property until payment of invoice has been made in full. Intellectual property rights are lawfully retained by the author.

4.6 The purchaser is only able to offset counter claims if they are acknowledged by law, uncontested, or prior written consent has been granted by EUPD GmbH. Customers are only have the right of retention if counterclaims are based on the same contractual relationship. The customer is prohibited from transferring any claims of payment against EUPD GmbH to a third party.

4.7 The estimated costs for the services provided by EUPD Research are based on project calculations and experience. Estimations are optimized and customer-oriented so that lower deviations may not be assumed.

However, it cannot be fully excluded that additional effort maybe required in the completion phase of the project. Should the suggested amount be exceeded, EUPD Research will inform the client promptly. Such additional efforts will be calculated on the basis of man-day costs and these may vary according to the qualification of the staff involved.

Upon notification of these additional costs the client may choose whether the project shall continue in accordance with the original cost estimation as stated in the proposal although full completion of the project may no longer be possible or agree to the revised cost estimation thus enabling full completion of the project. Should the client agree to the latter, this shall be subject to a separate written agreement.

5. Copyright and Licenses

5.1 The products and their intellectual property are protected by copyright. It is only possible to purchase a license to use the product and not the product itself or its content. The author/ creator remains the owner of intellectual property.

5.2 The customer is granted a non-transferable and non-exclusive license to use the product and the results and content in the product (with the exception of Exclusive-Services) for personal use only. As far as the customer (for example an agency) exclusively acts as the purchaser for a user mentioned by name within the order, then the right of use applies solely for said user.

5.3 Permission to use the licensed product in the national and international affiliates of the company is subject to the written approval of EUPD GmbH.

5.4 Any use of the product not explicitly permitted under copyright law is prohibited without the prior written consent of EUPD GmbH as the licensor and/or the written consent of the author. This includes but is not limited to copying, distributing, publishing, translating, saving, processing and reproducing the work in databases. Non-compliance will be prosecuted

6. Liability

6.1 The products were prepared with the utmost care, using professional methodologies and taking relevant legislation into account with the aim of assuring the best possible accuracy of the studies and their results. The data contained in this product is based on surveys of sample populations, conducted using standard statistical methods to the best of our knowledge. As such the study is subject to a certain statistical error rate and is based exclusively on the facts which were available at the time of the survey. Due to the aforementioned, no guarantee can be given for the accuracy and completeness of the studies and the data made available in them.

6.2 The studies contain specific information, but explicitly do not contain any definite recommendations on investments or actions to be taken. Should the user, having taken the above mentioned into consideration, choose to use the studies to support their decision making process, EUPD GmbH shall not assume liability for the economic success of such investments or actions.

7. Jurisdiction

The court of jurisdiction is Bonn. German law will be applied in all legal proceedings.

8. Severability Clause

Should any of these terms and conditions, either in full or in part, be invalid or incomplete, it shall not affect the validity of the other terms and conditions. In that case, the terms and conditions, as stated in German law come into effect.

As of October 2020