

BeFASTER

Deliverable 1: Identification of Target Markets, Defining the Value Chain and Route to Market Partner Assessment

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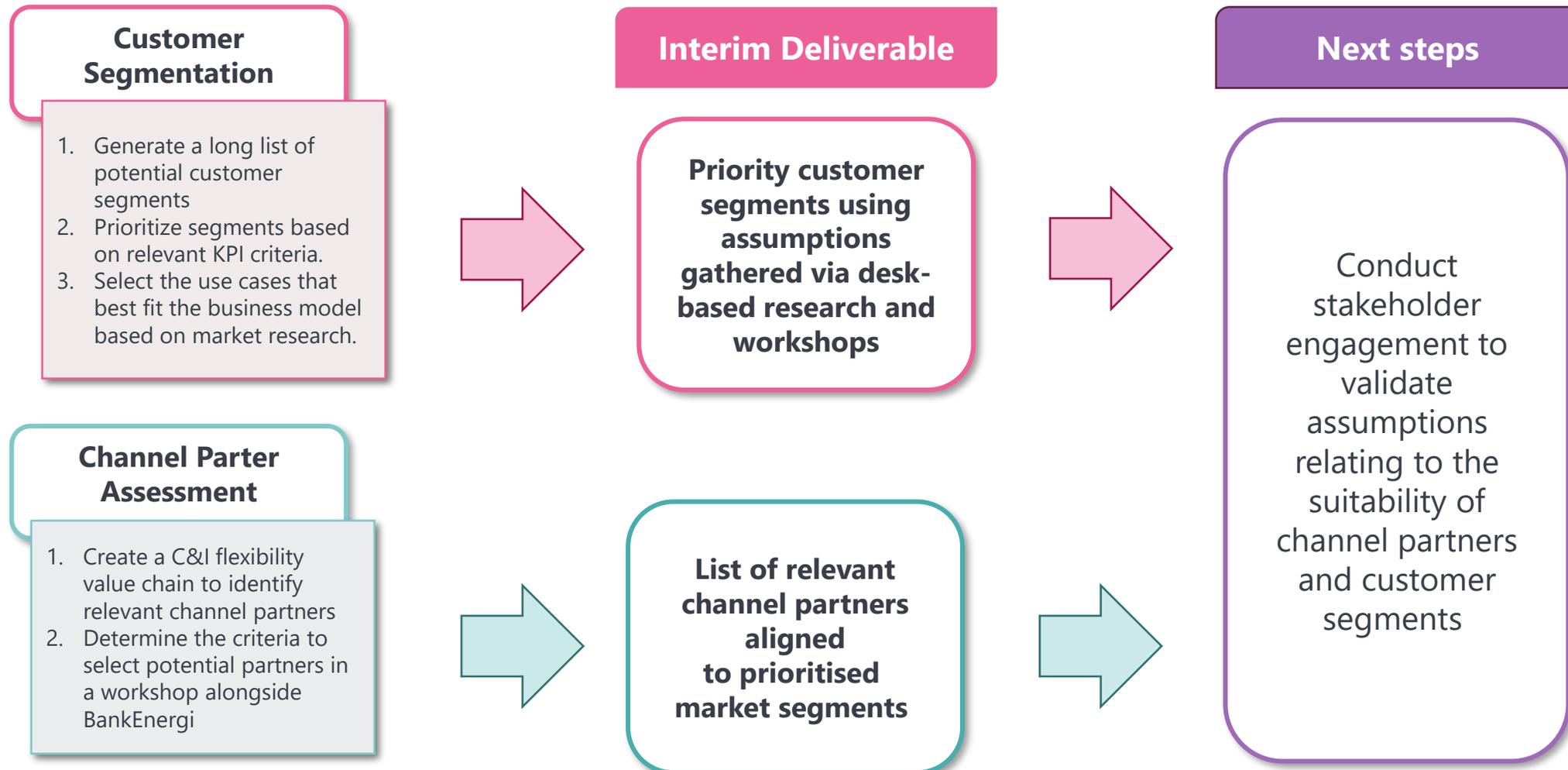
Contents

- 1 Executive summary
- 2 Identification of customer segments
- 3 Value chain mapping & role identification
- 4 Channel partner assessment
- 5 Next steps
- 6 Appendices
 - Appendix 1: Customer segments score criteria
 - Appendix 2: Channel partners score criteria

Executive summary

This report provides an overview of the process for shortlisting customer segments and channel partners

The two parallel strands of work involved detailed literature reviews, UK commercial sector energy data analysis and client workshops to select the most suitable channel partners and customer segments.



Four priority customer segments have been identified for further engagement by the project team



Colleges & Universities

Larger colleges and universities have a network of buildings with varied assets. This sector has strong internal incentives to decarbonise, alongside relatively predictable energy usage patterns driven by term times.

The sector is also highly diverse with many different universities and colleges to target. BankEnergi also has strong relationships in this sector with some early case studies making it an attractive early market.



New Build Commercial Offices

New build commercial offices face considerable incentives to decarbonise. This is driven by stringent existing and future policies that are aimed at reducing building emissions and meeting stretching EPC ratings.

This highly fragmented sector is competitive, with predictable energy use that peaks on weekdays. It also meets resilience criteria, as electrical loads can be shifted—primarily outside of occupied hours.

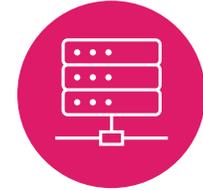


Leisure Centres

Leisure centres consume considerable amounts of energy as a % of OPEX so reducing energy costs is key to remaining financially viable.

They also meet market-competitiveness criteria, with numerous major and independent multi-club operators.

Their energy use is highly predictable, driven by set operating hours and seasonal or temperature variations. Many facilities with pools also have the potential to provide resilience via on-site thermal storage capability



Data Centres

Data centres are a rapidly growing sector and are highly attractive given their predictable energy use with stable energy profiles. This can make demand forecasting and automated response more straightforward vs other sectors.

In addition, the sector faces significant pressure to decarbonise due to its rapidly growing energy footprint and corporate net-zero commitments with new data centres being built with flexibility in mind.

The priority channel partners selected have the best access to customers and & align with the BankEnergi value proposition



BMS Platform Providers

BMS Platform Providers were deemed a key route to market partner for BankEnergi's solution. The team believe they have significant influence over the customer with early business models in the market indicating flexibility trading companies often partner with BMS Providers¹.

Research suggests many BMS Platform Providers don't possess the internal capability or understanding of energy trading / flexibility to deliver the service in house, so need credible partners to enable this. Providing commercial customers flexibility revenues could also be a differentiator in a highly competitive and concentrated market.



Facilities Management Companies

With direct access to customers and significant influence over a commercial landlord's energy consumption, facilities management companies were identified as another important channel partners

Many facilities management companies are seeking to extend their service beyond maintaining buildings, with many offering landlords' advisory services to achieve net zero at minimum cost. A key part of this could be to offer flexibility services in partnership with a trading company.



Energy Consultancy / Procurement / ESCOs

This channel partner group is a broad category that catches many different services in the commercial space. It consists of: firms who advise on energy management; brokers who procure energy on behalf of commercial entities; and energy service companies who finance and manage renewable assets in commercial buildings.

All these channel partners are closely involved in the management of energy in commercial buildings so have complementary value propositions. Many lack the specific expertise to engage in flexibility trading with many aligned to carbon reduction goals of the BankEnergi platform.

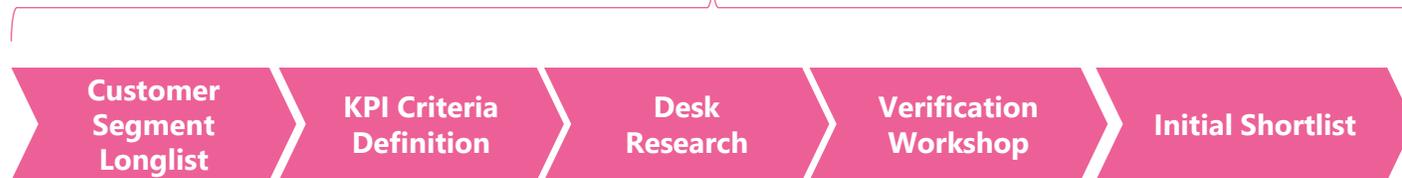
¹Schneider Electric partners with Equiwatt to enable residential flexibility (see [here](#)).

Identification of Customer Segments

A long list of potential customer segments was narrowed down to a manageable number of beachhead markets

- An extensive literature review and workshops with BankEnergi considered many sub-sectors across manufacturing, public and private offices, hospitality and retail sectors with an initial long list of **8** potential customer segments.
- Internal Energy Systems Catapult experts, literature reviews and workshops identified **12** relevant evaluation criteria and were used to score the long list of market segments.
- Five metrics were given additional weighting based on the importance to BankEnergi

Outputs covered in this report

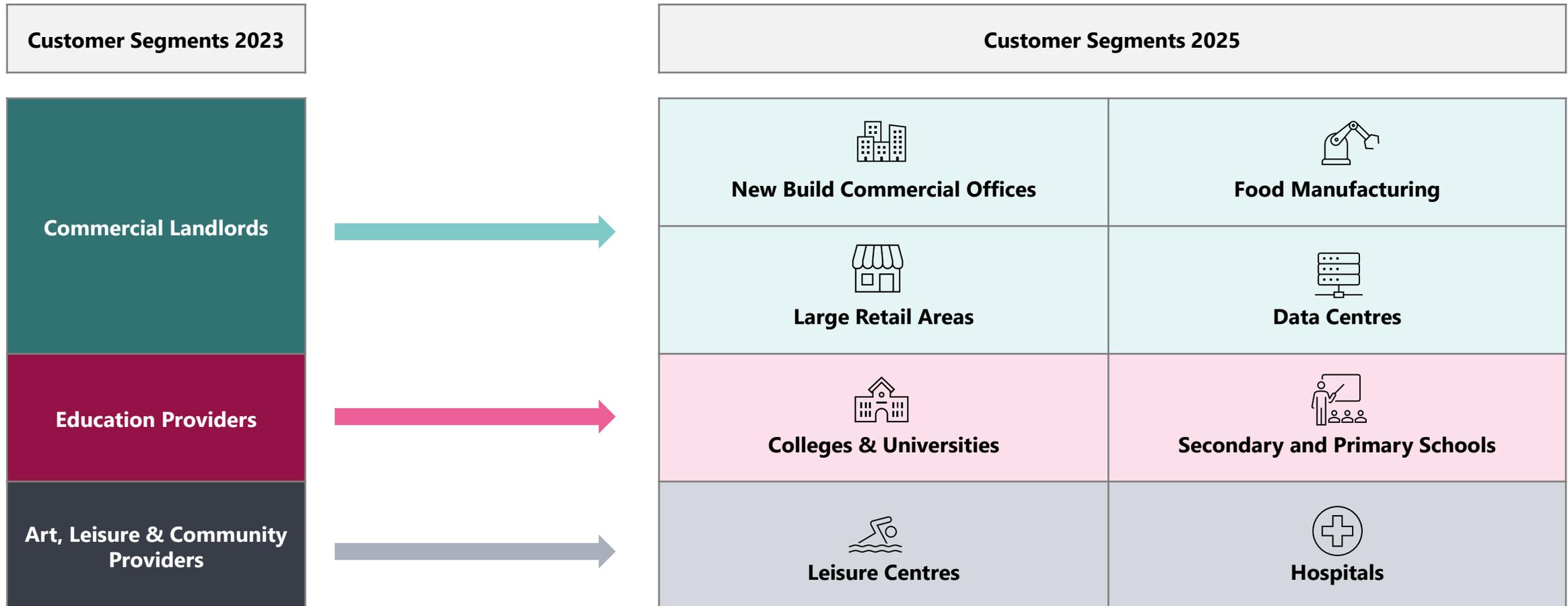


Outputs covered in future reports



Eight potential customer segments were identified for ESC team to score based off previous work

A previous value proposition study conducted by the ESC in 2023 identified three broad customer segments. Desk based research and two follow up workshops with BankEnergi resulted in more specific customer segments.



Twelve metrics were selected to rank the customer segments with five priority metrics chosen by BankEnergi

A detailed literature review & workshops with BankEnergi led to a longlist of 12 relevant metrics. Five priority metrics were chosen by BankEnergi, with their scores doubled to highlight their importance. The priority metrics are highlighted **in bold text** with shading.

Metrics		Description of Metric
Energy Profile	Energy Density	How energy dense, measured in kWh/m ² /year, a sector is which serves as an indicator of flexibility potential.
	Energy Profile Predictability	Measures how predictable energy use is which helps assess the sectors certainty of delivering flex.
	% of Energy as OPEX	Measures the proportion of operational expenditure attributed to energy costs.
Operational	Resilience	The degree to which a sector can shift loads while maintaining an acceptable level of operation.
	Asset Tenure	Ranks a sector on the estimated lifespan of a building and how often maintenance is performed.
	Digital Readiness	How feasible it is to integrate modern digital monitoring and control technologies into a sector.
Market	Ability to Pay	A qualitative measure that broadly assesses how much a sector is willing or able to invest in flexibility services.
	Market Concentration	Scores how concentrated or diverse an industry is, concentrated industries with few large entities would be harder for a start-up to enter.
	Level of Sector Electrification	The prevalence of electrification in the sector score determines the UK market potential for BankEnergi.
Strategic	Incentive to Decarbonise	The level of internal & external pressures to decarbonize via ESG commitments or mandated via government policies.
	Appetite to Risk	Measures how willing a sector is to adopt new technologies, business models, or operational changes to decarbonise.
	Existing Relationships	Ranks the strength of relationship BankEnergi already has with a sector.

All the metrics have a rationale for what constitutes a score of 1, 2 or 3.

Category	Energy Use			Operational			Market			Strategic Alignment		
KPI	Energy Density	Energy Profile Predictability	% of OPEX from Energy	Resilience	Asset Tenure	Digital Readiness	Ability to Pay	Level of Sector Electrification	Market Competitiveness	Existing Relationships	Incentive to Decarbonise	Appetite for Risk
Unit	kWh/m ² /year	N/A	%	N/A	N/A	N/A	N/A	% total energy use	N/A	N/A	N/A	N/A
What is a Score of 1?	<100	Irregular and unpredictable energy usage	>5.0	Low resilience, low ability to shift demand	Low asset lifetime and low likelihood of maintenance	Minimal digital infrastructure	Very low ability to invest	Less than 50% total energy consumption is electricity	Highly consolidated, few dominant players	Few or weak existing relationships with the market	Weak or unclear drivers to decarbonise	Risk-averse, conservative sector
What is a Score of 2?	100-200	Regular cycles of usage	5.0 – 10.0	Medium resilience, some ability to shift demand	Low asset lifetime but high likelihood of maintenance or high asset lifetime but low likelihood of maintenance	Some digital systems in place	Some ability to invest, may with strong business case	50-74% of electricity consumption is electricity	Moderate number of players	Moderate number or strength of existing relationships with the market	Some drivers, but not urgent or consistent	Willing to take calculated risks
What is a Score of 3?	>200	Steady, predictable usage	>10.0	High resilience, a lot of ability to shift demand	High asset lifetime and a high likelihood of maintenance	Advanced digital tools and data integration	Strong financial capacity, able to fund independently	Over 75% of electricity consumption is electricity	Highly fragmented, many players competing	Multiple or particularly strong existing relationships	Strong policy, cost and stakeholder pressure	Open to innovation and experimentation

The four priority sectors were chosen by a combination of the quantitative scoring and consensus workshops

		 Large Retail Areas	 Food Manufacturing	 Data Centres	 New Build Commercial Offices	 Leisure Centres	 Colleges & Universities	 Hospitals	 Primary & Secondary Education
Energy Profile	Energy Density	2	2	3	2	3	1	2	2
	Energy Profile Predictability	4	6	6	4	4	4	4	4
	% of Energy as OPEX	2	3	3	1	3	1	1	2
Operational	Resilience	6	2	4	4	4	4	2	2
	Asset Tenure	1	2	1	1	1	2	3	3
	Digital Readiness	2	1	3	3	2	2	1	1
Market	Ability to Pay	3	2	3	3	1	2	1	1
	Market Concentration	1	3	2	3	3	2	2	2
	Level of Sector Electrification	4	2	6	4	2	2	2	2
Strategic	Incentive to Decarbonise	6	4	4	6	6	4	4	2
	Appetite to Risk	2	2	3	2	2	3	1	1
	Existing Relationships	2	2	4	6	6	6	2	2
TOTAL		35	31	42	39	37	33	25	24

Pink boxes highlight the priority sectors chosen. BankEnergy's **existing relationships** with a sector was deemed a critically important criteria. This is why large retail areas were ruled out of scope despite a high total score.

Value Chain Mapping and Role Identification

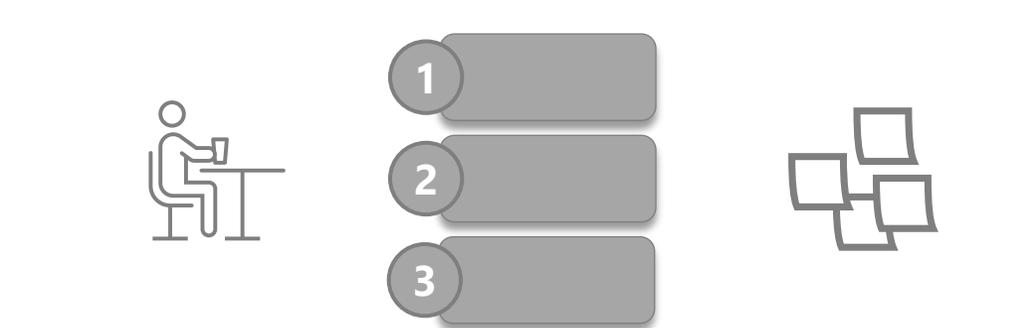
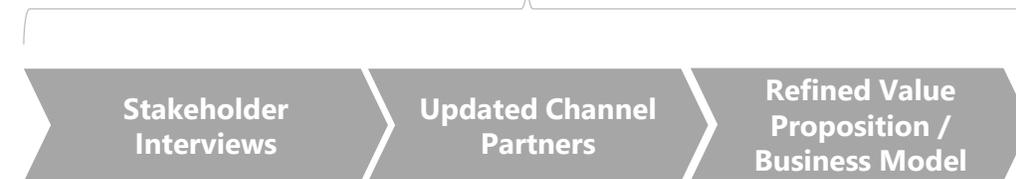
Extensive research has taken place to understand the value chain, BankEnergi's role in it and the most suitable channel partners

- To identify potential channel partners, defining the value chain was key to understanding the processes, participants and roles in the industry. This enables the team to define which routes to market approach would maximise access to each customer segment.
- To identify the most suitable routes to market for BankEnergi, the team identified and scored channel partner types using key selection criteria to narrow down the list.
- A final verification workshop was conducted to seek buy in on the final channel partners and ratify the scoring. A long list of potential companies for each channel partner segment was also identified.

Outputs covered in this report



Outputs covered in future reports



Mapping out the key activities BankEnergi perform from across the typical flexibility life cycle

	Flexibility Capacitation	Integration / Enablement	Aggregation	Negotiation Preparation	Market Operation	Activation & Settlement
Summary of Activity	Asset provision, installation and retrofit	Register on BankEnergi Platform & integrate with customer BMS	Ongoing operation of the digital platform to respond to flex requests.	BankEnergi analytics to compute optimal flexibility bids	Flexibility market operator co-ordinates and allocates flexibility bids	BankEnergi confirms activation & consumer-end balance & settlement
Main Activities (Performed Once)	<ul style="list-style-type: none"> Identification & prequalification of ability to install 	<ul style="list-style-type: none"> Register with FMAR Estimation of customer's ability to provide flexibility. 	<ul style="list-style-type: none"> Relevant registration of aggregators to operate in certain flexibility markets (i.e. Piclo) 	<ul style="list-style-type: none"> DSO / TSO pre-qualification 	<ul style="list-style-type: none"> DSO / TSO pre-qualification Contracting support 	<ul style="list-style-type: none"> N/A
Main Activities (Regularly Performed)	<ul style="list-style-type: none"> Asset maintenance 	<ul style="list-style-type: none"> Integration and alignment with BMS Processing of metering / sub-metering data to track consumption / production 	<ul style="list-style-type: none"> Ongoing evolution and maintenance of digital platform to optimize portfolio Baselining customers energy consumption to determine flexibility provision / payments 	<ul style="list-style-type: none"> Processing request of the flexibility needs from procurers Identification of flexibility zones for the aggregation process Optimal bids prepared & submitted 	<ul style="list-style-type: none"> DSO analysis on asset flexibility on local grid constraint Collection and ranking of flexibility bids Formalisation of contracts buyers and sellers 	<ul style="list-style-type: none"> Verify turn up / down event on pre-agreed baseline (activation) DSO / TSO settle with aggregator Aggregator settles with consumer / DER Manager Payment received from DNO to aggregator and passed on to customer
Supporting Activities	<ul style="list-style-type: none"> Financing Energy services: asset sizing, efficiency diagnostic, energy usage assessment, optimal aggregation market analysis. 	<ul style="list-style-type: none"> Integration with other services (health, surveillance, mobility) Online form / portal to assess flexibility potential (carbon & monetary) 	<ul style="list-style-type: none"> N/A 	<ul style="list-style-type: none"> Market analytics Market prediction Bidding strategies Forecasting (i.e., weather) Grid analysis 	<ul style="list-style-type: none"> N/A 	<ul style="list-style-type: none"> Post settlement analytics & reporting (carbon and financial)

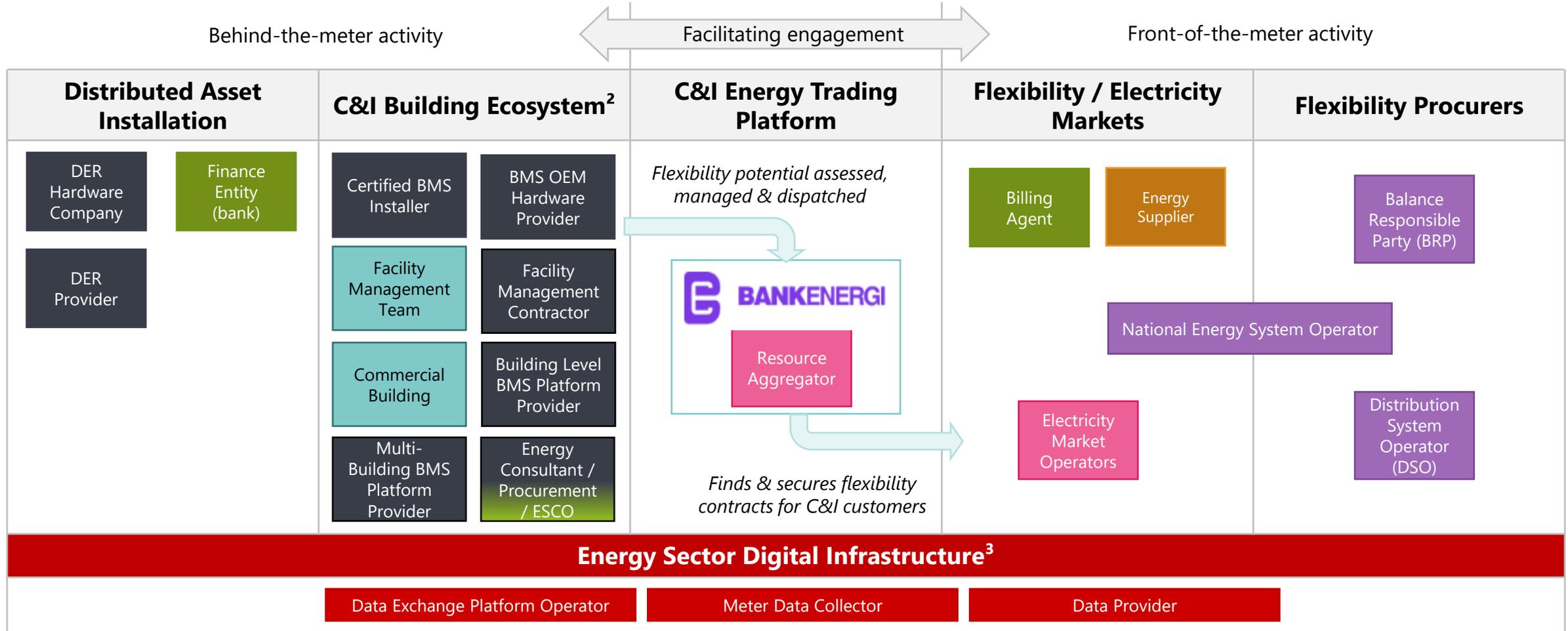
An extensive list of roles were identified across the UK flexibility value chain to identify potential channel partners

	Role	Role Description
Financial Services	Finance Entity	Bank or financial institution that provides capital to consumers
	Billing Agent	Responsible for invoicing a concerned party and providing details of an energy bill
Service / Asset Provider	DER Hardware Company	Manufactures distributed energy resources which are later supplied to vendors
	DER Provider	Responsible for installing and/or maintaining assets related with distributed energy resources.
	Certified BMS Installer	Designs, installs & maintains Building Management Systems (BMS) in commercial buildings
	BMS OEM Hardware Provider	Designs and assembles BMS units
	Energy Consultant / Procurement / ESCO	A broad term that incorporates third party intermediaries, ESCOs who finance and install assets and multi-building energy management integrators.
	Facilities Management Contractor	A company that provides services to manage a building's facilities on behalf of the occupants
	BMS Platform Provider	A company that provides an online platform for consumers to manage their building's energy.
Consumer	Commercial Building	The customers building where the distributed energy assets are providing a service / flexibility
	Facilities Management Team	The customer's team responsible for managing the building and facilities management contractors.

	Role	Role Description
Financial Services	Data Exchange Platform Operator	Owns and operates a communication system to transfer data.
	Meter Data Collector	Responsible for meter reading and quality control of the reading
	Data Provider	Has a mandate to provide data to other parties
Energy Retail		Supplies or takes electricity from a party connected to the grid
Flexibility Intermediary	Resource Aggregator	Aggregates (i.e., collects and combines) multiple distributed energy resources for usage by a service provider for energy market services.
	Electricity Market Operators	A party that provides a service between buyers and sellers to facilitate the procurement of capacity and/or energy bids.
Flexibility Procurer	Balance Responsible Party	An energy market participant responsible for ensuring their portfolio of energy injections and withdrawals remains balanced.
	National Energy System Operator	The independent, publicly owned body responsible for managing and planning the UK's electricity and gas networks.
	Distribution System Operator (DSO)	Local grid operator responsible for the security of supply and reliability of the distribution network.

A high-level value chain was created articulating where BankEnergi operate alongside other potential channel partners

Flexibility Value Chain Software, Digital Services & Analytics¹



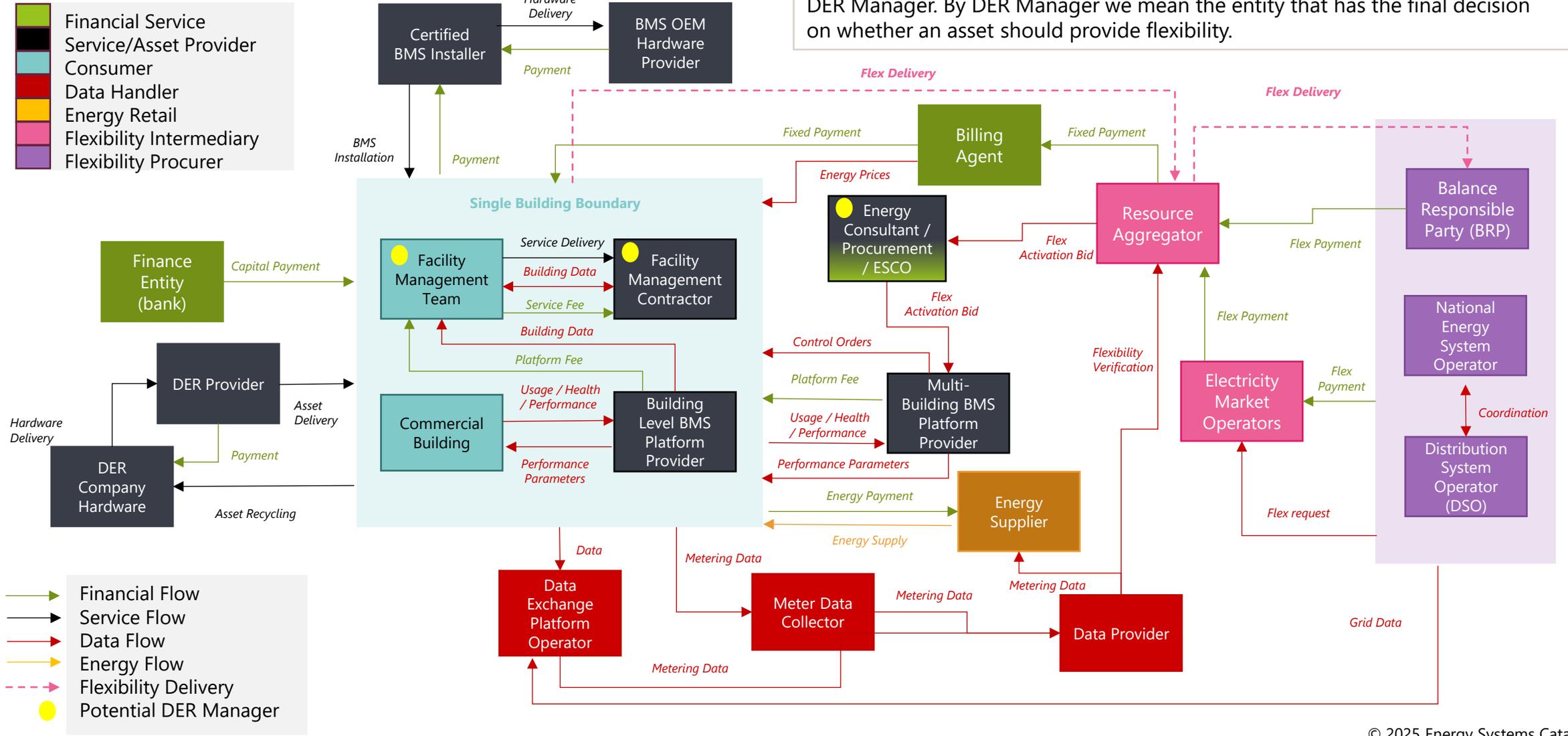
¹Applies across the value chain from future price forecasting, building energy optimisation, future grid price forecasting and other supporting services

²Energy Suppliers and Billing Agents should also be included in the C&I Buildings Ecosystem section

³The digital systems in place that securely transfer data across the energy value chain that enables flexibility to occur

A more complex mapping highlighted the flows & relationships between actors to identify the most relevant channel partners

In this scenario, an Energy Management Consultant is performing the role of a DER Manager. By DER Manager we mean the entity that has the final decision on whether an asset should provide flexibility.



Channel Partner Assessment

A long list of eight channel partner criteria were identified, with customer longevity & ESG goals added by BankEnergi

Energy Systems Catapult have a pre-set list of criteria when selecting channel partners. During a consensus workshop. BankEnergi added a few metrics to arrive at 8 factors, with the top 5 used to select suitable channel partners.

Ranking	Attribute	Explanation	Justification
1	Influence Over Customer	The partner has a close, trusted relationship with the customer, enabling them to guide decisions in our favour and support the adoption of new solutions	Convincing commercial customers to trust flexibility is key, so influence over customers is of paramount importance.
2	Complementary Value Proposition	Allows both parties to offer a more complete and compelling solution to customers. By combining strengths and resources, the partnership can address a broader range of customer needs, enhance market appeal and differentiate from competitors	The proposition must compliment and improves the channel partner's offer to the end customer
3	Regularity of Interaction	The strength of the relationship with the customer, whether it is a long-term part partnership rather than punctual projects	Regular touch points with the customer increase the likelihood to adopt flexibility
4	Ease of Access	Partners that promptly address customers challenges, boost customer satisfaction, and simplify logistics, ensuring customers receive timely and smooth support throughout their journey	Smooth support to customers increases retention and trust.
5	ESG Goals Alignment	Among its corporate objectives is the reduction of carbon emissions and their commitment to sustainability	It is aligned with BankEnergi's value proposition to reduce carbon emissions.
6	Market Competition	An ideal partner does not have conflicting relationships with direct competitors, but instead helps us gain a competitive edge through differentiated offerings, strategic positioning, or access to key customer segments	Very concentrated market in some places so overlap of services / propositions is expected.
7	Accustomed to Upselling	The partner is experienced and skilled at identifying opportunities to offer customers higher-value or additional products and services beyond the basic solution.	Upselling not a massive feature in this market
8	Market Size	A higher position in the market may provide greater leverage for partnerships. However, this is a fast-changing market, and potential is also an important aspect.	The early stage of BankEnergi means a small market size isn't of much importance currently.

Green shaded rows signify attributes added in by BankEnergi as being worthwhile to include.

Four channel partners were shortlisted with the ESCOs and energy consultancy / deemed similar in nature and brought together

Channel Partner	Influence over Customer	Complementary Value Proposition	Regularity of Interaction	Ease of Access	ESG Goals	Total
BMS Platform Providers	3	3	3	3	3	15
Facility Management Companies	3	3	3	3	3	15
Energy Service Company (ESCO)*	3	3	3	2	3	14
Energy Consultancy / Procurement*	2	3	2	2	3	12
BMS Installers	2	2	2	2	2	10
DER Providers	2	2	2	2	3	11

*Energy Service Companies (ESCOs) and Energy Consultancy /Procurement were deemed similar so grouped into one broad channel partner group

Note: The criteria for assigning a score to each segment are detailed in the [Appendix 2](#).

To help inform the interviews, a long-list of potential stakeholders have been identified for outreach

BMS Platform Provider	Facilities Management Company	Energy Consultancy / Procurement / ESCOs*

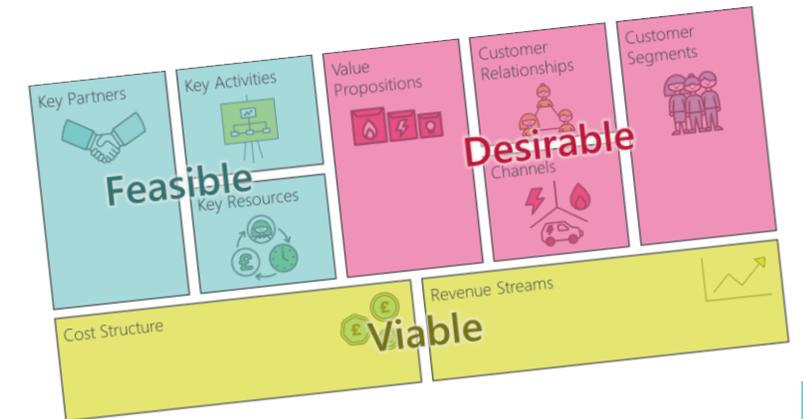
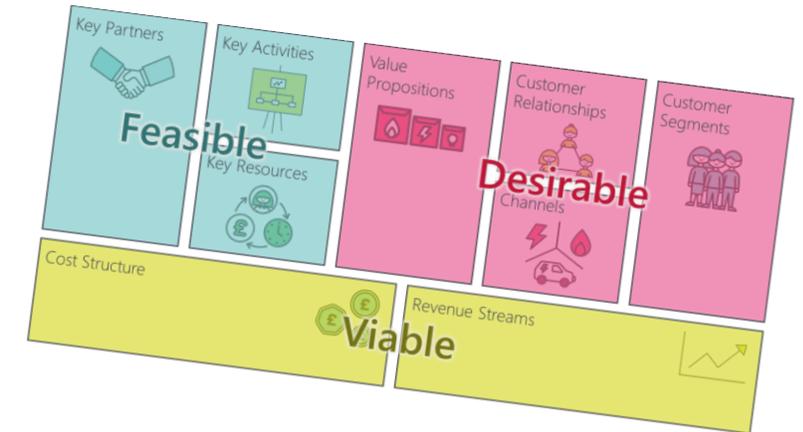
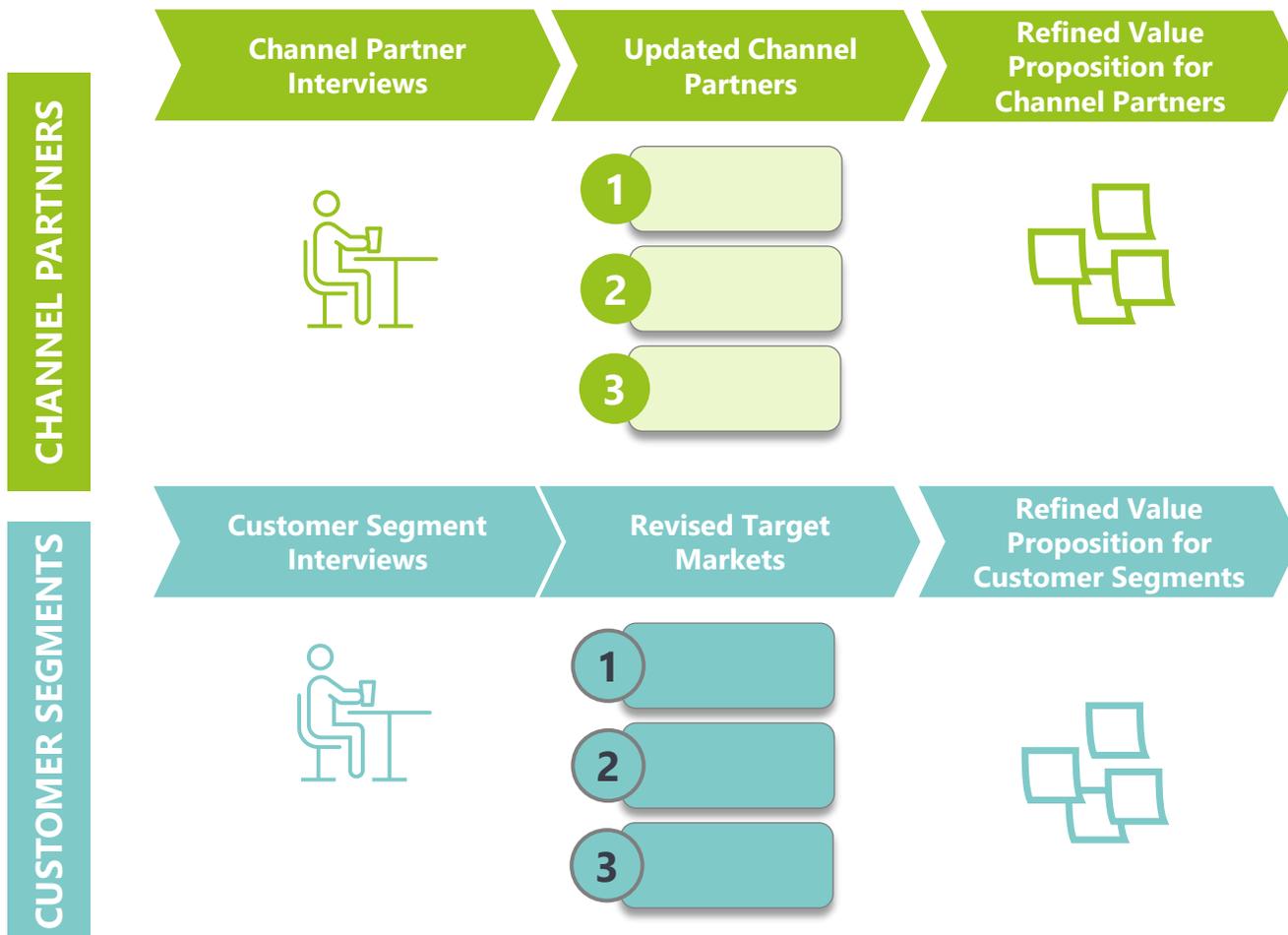
*Energy Consultancy / Advisory, Third Party Intermediaries and ESCOs have been bundled into one broad category for the purpose of this work.

Next Steps

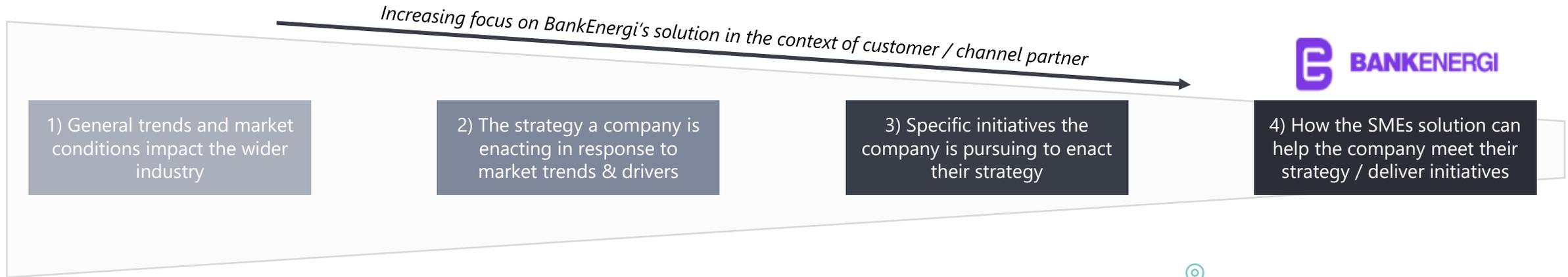
The stakeholder engagement process will test the literature review assumptions and help generate focused business model canvases

Conduct stakeholder engagement to test assumptions and refine the BankEnergi value proposition

Generate 1 to 2 business model canvases based on the new value propositions



The interview format tests the literature review assumptions & to better understand the customer's / channel partner's motives



Customer Segments Assumptions*

- Energy costs drive customer behaviour more than carbon in leisure centres and new build commercial offices
- All customer segments trust their facilities management companies and BMS companies to provide them energy insights / advice
- Despite lower levels of electrification, leisure centres still have enough flex capacity to be an attractive market for BankEnergi
- Data centres could get involved in flexibility to reduce their carbon footprint



Channel Partners Assumptions*

- All the channel partners see flexibility trading as something value add to their current business model
- All the channel partners don't have the capability to conduct flexibility trading
- All channel partners don't have the inclination to develop the capability to conduct flexibility trading
- BMS providers will allow third parties access to the data being generated

Appendices

Appendix 1: Customer segments score criteria

ESC augmented the customer segments using desk research and previous market segmentation work conducted in 2023

Customer Segments 2023	Customer Segment	Key Criteria for Engagement	Reasoning
Commercial Landlords	Commercial Offices	<ul style="list-style-type: none"> • Purpose-built only • Both public and private 	A large and fragmented sector with a strong digital infrastructure and consistent energy use, offering significant potential for scalable flexibility solutions.
	Large Retail Areas	<ul style="list-style-type: none"> • Includes food and nonfood retail • Also includes retail parks with multiple shops 	A wide-ranging sector covering food retail, non-food retail and large retail parks with multiple shops. High energy demand and prevalence of electrification.
	Food Manufacturing	<ul style="list-style-type: none"> • Batch manufacturing only 	A major contribution to the UK's manufacturing sector (around 20% of output), this sector's batch processing operations and high energy density offer strong potential for flexibility energy use.
	Data Centres	<ul style="list-style-type: none"> • Purpose built data centres only, 	With an extremely high energy density, digital maturity and rapid market growth, data centres are well positioned for advanced flexibility interventions, could have predictable and flexible loads.
Education Providers	Further and Higher Education	<ul style="list-style-type: none"> • Both colleges and universities • Primarily those with large campuses 	An innovation friendly sector with a strong track record of piloting flexibility services and a diverse estate that supports scalable deployment
	Secondary and Primary Schools	<ul style="list-style-type: none"> • Primarily looking at state schools 	A widespread and structured sector with a predictable energy use, as well as a growing interest in sustainability and digital upgrades. A renewed focus on school energy generation via GB Energy funding.
Art, Leisure & Community Providers	Leisure Centres	<ul style="list-style-type: none"> • Only those that have swimming pools 	More flexible loads (especially swimming pools) and allows the targeting of local authorities as a larger target market.
	Hospitals	<ul style="list-style-type: none"> • Only NHS hospitals, not private 	Despite some assets being critical, hospitals also have substantial non-critical energy loads that can be flexed. Their long asset lifespans and public service role can make them a valuable sector to explore.

Each KPI had a set definition for a scoring of 1-3

Category	Energy Use			Operational			Market			Strategic Alignment		
KPI	Energy Density	Energy Profile Predictability	% of OPEX from Energy	Resilience	Asset Tenure	Digital Readiness	Ability to Pay	Level of Sector Electrification	Market Competitiveness	Existing Relationships	Incentive to Decarbonise	Appetite for Risk
Unit	kWh/m ² /year	N/A	%	N/A	N/A	N/A	N/A	% total energy use	N/A	N/A	N/A	N/A
What is a Score of 1?	<100	Irregular and unpredictable energy usage	>5.0	Low resilience, low ability to shift demand	Low asset lifetime and low likelihood of maintenance	Minimal digital infrastructure	Very low CAPEX to invest	Less than 50% total energy consumption is electricity	Highly consolidated, few dominant players	Few or weak existing relationships with the market	Weak or unclear drivers to decarbonise	Risk-averse, conservative sector
What is a Score of 2?	100-200	Regular cycles of usage	5.0 – 10.0	Medium resilience, some ability to shift demand	Low asset lifetime but high likelihood of maintenance or high asset lifetime but low likelihood of maintenance	Some digital systems in place	Some CAPEX, may invest with strong business case	50-74% of electricity consumption is electricity	Moderate number of players	Moderate number or strength of existing relationships with the market	Some drivers, but not urgent or consistent	Willing to take calculated risks
What is a Score of 3?	>200	Steady, predictable usage	>10.0	High resilience, a lot of ability to shift demand	High asset lifetime and a high likelihood of maintenance	Advanced digital tools and data integration	Strong financial capacity, able to fund independently	Over 75% of electricity consumption is electricity	Highly fragmented, many players competing	Multiple or particularly strong existing relationships	Strong policy, cost and stakeholder pressure	Open to innovation and experimentation

Energy Density

Description

- Energy density, measured in kWh/m²/year, serves as a strong indicator of flexibility potential.

Motivation

- Higher energy density implies greater opportunity for demand-side management and load shifting, as these assets typically have larger energy loads that can respond to grid signals or operational adjustments.

Key Insights

- Data centres have an incredibly high energy density, almost 7 times greater than the next highest market, Leisure Centres.

Market	Score	Value (kWh/m ² /year)	Sources
Commercial Offices	2	140	(1)
Large Retail Areas	2	200	(1)
Food and Drink Batch Manufacturing	2	200	(1)
Universities & Colleges	1	66	(2)
Data Centres	3	2477	(3)
Hospitals	2	200	(4)
Secondary and Primary Schools	2	133	(5)
Leisure Centres	3	360	(6)

Energy Profile Predictability

Description

- Predictability measures how consistently a sector's energy demand follows known patterns based on time, occupancy, or operational schedules.

Motivation

- Markets with predictable energy profiles are better suited for demand-side management and flexibility services. Consistent patterns allow for more reliable interventions and easier integration of energy-saving technologies.

Key Insights

- Data centres, with servers and cooling systems operating 24/7 with minimum fluctuation, were deemed as having a very predictable energy profile

Market	Score	Explanation	Source
Commercial Offices	2	Demand profile has clear peaks during weekdays and troughs during weekends/nights following consistent, predictable occupancy rates.	(7)
Large Retail Areas	2	Demand from refrigeration, lighting and HVAC is generally uniform but overall still varies somewhat due to ambient temperature, customer traffic and stocking cycles.	(8)
Food & Drink Manufacturing	3	Demand climbs sharply during production runs (especially with heating / freezing) and then drops back to a stable baseline. This highlights that there may be scope for flexibility work, especially as the energy demand over time can easily be predicted.	(9)
Colleges & Universities	2	Although demand fluctuates with term times, building usage, and seasonal heating/cooling, the variability is cyclical and predictable.	(10)
Data Centres	3	Servers and cooling systems operate 24/7 with minimal fluctuation.	(11)
Hospitals	2	Continuous operation of critical systems ensures a predictable, steady energy demand although HVAC energy requirements change with ambient temperature and weather.	(12)
Secondary and Primary Schools	2	Demand profile follows school hours and terms, with reductions in non-term times, so there is structured, predictable fluctuation	(14)
Leisure Centres	2	Leisure centres operate on structured schedules with their demand profiles also fluctuating based on seasonal demand and ambient temperature.	(15)

% of OPEX from Energy

Description

- This metric measures the proportion of operational expenditure attributed to energy costs.

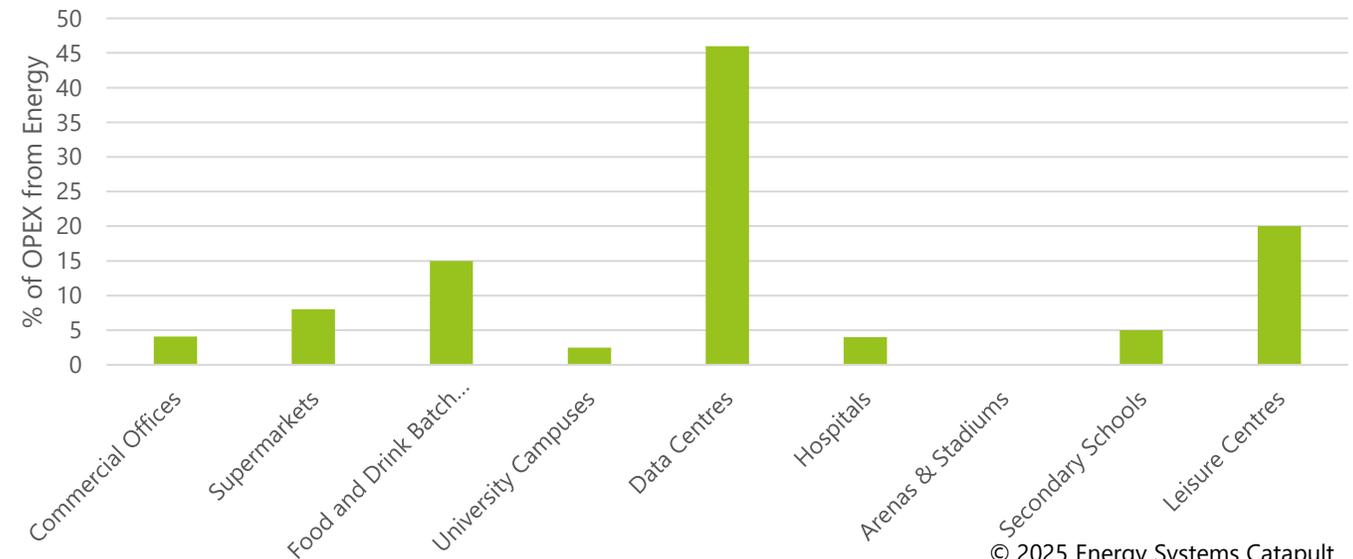
Motivation

- Assets whose energy use is responsible for a larger percentage of OPEX are more incentivized to actively manage their energy consumption and pursue efficiency or flexibility measures to reduce costs and improve financial performance.

Key Insights

- As seen below, energy accounts for an exceptionally high share of operating costs in data centres, up to 46%, making energy management a critical financial priority for the sector

Market	Score	Value (%)	Sources
Commercial Offices	1	4.1	(16)
Large Retail Areas	2	8.0	(17)
Food and Drink Batch Manufacturing	3	15.0	(18)
Universities & Colleges	1	2.5	(19)
Data Centres	3	46.0	(20)
Hospitals	1	4.0	(17)
Secondary and Primary Schools	2	5.0	(17)
Leisure Centres	3	20.0	(21)



Description

- Resilience measures the ability of a target market's building stock and operations to reliably maintain essential services while being able to flex part of their energy load.

Motivation

- The more resilient a market, the more they will be able to provide flexibility, both in terms of volume and regularity.

Key Insights

- Large retail areas, in particular supermarkets, are highly resilient, with the ability to flex large refrigeration loads and other systems. Their capacity to turn energy on and off is among the highest of all sectors.

Market	Score	Explanation	Source
Commercial Offices	2	Loads such as HVAC and lighting can easily be flexed but only fully outside of occupied hours. Other loads, such as IT and security, require constant power.	(22)
Large Retail Areas	3	A large portion of electricity demand is used for refrigeration which can easily be flexed while remaining within thermal constraints. Additionally, most other systems can be turned on or off freely.	(23)
Food & Drink Manufacturing	1	Site operators are highly sensitive to any risk of lost power, downtime, or compromised food quality and few sites have backup generation or energy storage.	(24)
Universities & Colleges	2	Limited amount of flexibility in residential buildings but more flexibility is available for	
Data Centres	2	Being newer, data centres are typically engineered for high resilience through separation of their critical and non-critical loads - like cooling and backup systems - which allows for some degree of flexibility.	(25)
Hospitals	1	While critical care in UK hospitals must remain powered, non-clinical areas (offices, laundry, some wards) can participate in flexibility but there's reticence from hospital management to	(26)
Secondary and Primary Schools	1	Whilst some systems such as HVAC and lighting can be flexed, safeguarding and operational requirements limit flexibility during occupied hours.	
Leisure Centres	2	Pools allow for massive energy storage with an ability to flex their load however when occupied they must ensure safe water temperatures and air quality.	(28)

Asset Tenure

Description

- Asset tenure describes the overall lifetime of the key assets associated with the market. This depends on both the estimated physical lifespan of a typical asset and the likelihood of continued maintenance.
- The given score represents a combination of these two aspects, with more weight given to the physical lifespan due to its quantitative nature.
- A higher operational score is assigned where assets are likely to receive ongoing investment and remain in use (e.g., hospitals), while lower scores reflect uncertainty in long-term viability (e.g., commercial offices, due to evolving workplace trends).

Motivation

- Assets with long lifespans and a high likelihood of being maintained or refurbished are more attractive for long-term energy flexibility solutions. They offer a stable platform for investment and operational optimisation.

Key Insights

- Hospitals and Secondary and Primary Schools received the highest score due to their long asset lifetimes and strong likelihood of continued use and refurbishment.

Market	Score	Typical Lifespan (years)	Refurbishment Likelihood	Sources
Commercial Offices	1	50	High (+1)	(35)
Large Retail Areas	1	50	Low (0)	(35)
Food & Drink Manufacturing	2	20-30	High (+1)	(36)
Universities & Colleges	2	50	High (+1)	(35)
Data Centres	1	12.5	High (+1)	(37)
Hospitals	3	75	Low (0)	(38)
Secondary and Primary Schools	3	80	Low (0)	(40)
Leisure Centres	1	40	Low (0)	(41)

Description

- Assesses how feasible it is to deploy and integrate modern digital monitoring and control technologies, including sensors, Building Management Systems (BMS), IoT devices, and data platforms which are essential for flexibility services.
- A score of 3 reflects a seamless integration of sensor technologies, while a score of 1 reflects a large difficulty in integrating infrastructure.

Motivation

- Sectors with advanced digital infrastructure can more easily adopt energy flexibility solutions and optimise performance.

Key Insights

- Although, hospitals and schools were scored as a 1, as typically, older buildings in these sectors lack modern digital infrastructure, making upgrades and integration more challenging

Market	Score	Explanation	Sources
New Build Commercial Offices	3	Modern buildings typically feature building management systems that can fairly easily be upgraded (target for	(29)
Large Retail Areas	2	Many supermarkets already have smart refrigeration systems with sensor technology, allowing for easier implementation of BankEnergi’s technology. However other retail areas are less sophisticated.	(30)
Food & Drink Manufacturing	1	Only a small number of factories currently have the capability for digitalisation with many surveys indicated the poor level of digitisation in UK manufacturing.	(31)
Universities & Colleges	2	Further and Higher Education tend to be a mix of newer buildings, with already built-in systems/sensors, and older buildings, with little technology and retrofitting issues.	(29)
Data Centres	3	Datacentres are a new technology and so are typically built with advanced sensor ecosystems from day one making the integration of Bank Energi’s technology particularly viable.	(32)
Hospitals	1	Many hospitals tend to be older buildings without BMS systems, making it difficult to implement sensor technology. Additionally, it can be very difficult to close down wards for retrofitting, especially with the overall lack of hospital beds	(33)
Secondary & Primary Schools	1	Few schools seem to have building management systems or existing sensor technology and typically have older buildings.	(34)
Leisure Centres	2	Some leisure centres have building management services although some older and less developed both lack them and may not be easily retrofitted.	

Description

- This metric reflects the financial capacity of organisations or asset owners to invest in energy-related improvements.
- It considers factors such as typical access to capital, cash flow, ownership structure, and historical behaviour around capital expenditure for infrastructure and sustainability projects.
- A higher score reflects greater ability and willingness to fund energy upgrades and flexibility-enabling technologies.

Motivation

- The higher the ability of a market to pay, the less they are impacted by barriers relating to cost.

Key Insights

- Data centres, scored as a 3, have substantial capital expenditure budgets and strong financial backing, enabling significant investment in energy solutions.
- Although, schools scored as a 1, face declining capital expenditure year-on-year, limiting their ability to invest in energy improvements

Market	Score	Explanation	Source
Commercial Offices	3	Institutional investors, REITs, and large property owners dominate this space and generally have strong access to capital as well as active interest in maintaining asset value.	(42)
Large Retail Areas	3	Generally, large retail areas are very able to pay, as the dominant large corporate players have access to capital, strong cash flows and can benefit from economies of scale.	(43)
Food and Drink Batch Manufacturing	2	Whilst the size, scale and potential of the market are large, research found that 41% of food and drink manufacturers are scaling back long-term investment due to cost pressures.	(44)
Universities & Colleges	2	Despite the scale of capital expenditure by UK universities, ~£4bn in 2021/2022, their non-profit nature and general funding crises temper their ability to pay.	(45)
Data Centres	3	Data centres are typically owned by specialist infrastructure firms or tech giants, with a strong balance sheet. Research also indicates record amounts of capital are being invested into data centres due to the rapid growth of AI.	(46)
Hospitals	1	Despite NHS annual capital expenditure being ~£11.7bn in 2022/2023, this is prioritised .	(47)
Secondary and Primary Schools	1	Capital expenditure in Secondary and Primary Schools has massively dipped, and constantly faces cuts, with a drop of 50% from the peak in 2010.	(48)
Leisure Centres	1	The sector has limited financial capacity to invest in energy related upgrades, as evidenced by their reliance on grant funds such as Sport England's £60m fund to help leisure centres with pools become more energy efficient.	(49)

Level of Sector Electrification

Description

- This metric measures a sector’s typical level of electrification, primarily using electricity as a % of total energy consumption.

Motivation

- Markets with a high level of electrification have a higher electricity demand per unit of energy density than markets that use other fuel sources.
- The higher the electricity demand, the more potential for flexibility.

Key Insights

- Data Centres have the highest prevalence of electrification with nearly all energy consumption being electricity.
- Large retail areas and new build commercial offices also score. Both sectors have over 50% of their energy consumption being electricity.

Market	Score	Rationale	Source
New Build Commercial Offices	2	51% of total energy use is electricity according to UK energy consumption table 2024.	<u>90</u>
Large Retail Areas	2	65% of total energy use is electricity according to UK energy consumption table 2024.	<u>90</u>
Food & Drink Manufacturing	1	35% of total energy use is electricity according to UK energy consumption table 2024.	<u>90</u>
University & Colleges	1	27% of total energy use (for universities) is electricity according to UK energy consumption table 2024.	<u>90</u>
Data Centres	3	A major user of electricity with reports highlighting that almost all energy use is electricity (with some needing CCGTs for electricity generation)	<u>91</u>
Hospitals	1	25% of total energy use is electricity according to UK energy consumption table 2024.	<u>90</u>
Secondary and Primary Schools	1	14% & 22% of primary & secondary schools total energy use respectively is electricity according to UK energy consumption table 2024.	<u>90</u>
Leisure Centres	1	16% of total energy use is electricity according to UK energy consumption table 2024.	<u>90</u>

Market Competitiveness

Description

- Market competitiveness measures how intensely organisations within a sector compete for market share, contracts, or customers.
- A score of 3 reflects a highly competitive market with many players and strong pressure to differentiate or innovate, while a score of 1 reflects a low-competition environment with few players, high barriers to entry, or limited customer choice.

Motivation

- The more competitive a market, the more incentivised individual players are to innovate and differentiate themselves.

Key Insights

- Food and drink manufacturing was measured as the most competitive and fragmented market, with over 12,500 manufacturers in the UK, offering many routes to market and opportunities for differentiation.

Market	Score	Explanation	Sources
New Build Commercial Offices	3	The market is highly fragmented, with there being over 22,000 property management business in the commercial office space as of 2023.	(59)
Large Retail Areas	1	The UK supermarket sector is highly oligopolistic, with the top four players owning 65% of the market. Non-food retail is more fragmented but still less so than other sectors.	(43)
Food & Drink Manufacturing	3	The UK is home to 12,515 food and drink manufacturers, implying the market is very fragmented, implying it is a good market to target with many different RtM opportunities	(60)
Universities & Colleges	2	As of 2022, there are 260 Universities in the UK all operated individually and 256 independent colleges also individually operated meaning the market is fragmented.	(61)
Data Centres	2	Research suggests that while the UK data centre market is relatively competitive and somewhat fragmented, it is also somewhat dominated by global technology giants.	(62)
Hospitals	2	As of 2024, there were 215 NHS trusts and 218 private hospitals across the UK which, combined with siloed procurement makes for a relatively fragmented market.	(63)
Secondary and Primary Schools	2	As of 22/23, there are 1091 Multi Academy Trusts operating in the UK, with each one being individually responsible for procurement.	(65)
Leisure Centres	3	There are over 30 major operators and thousands of independent and multi-club operators managing 2,882 leisure sites with swimming pools across the UK, indicating a highly fragmented market.	(66)

Incentive to Decarbonise

Description

- This metric captures the strength of regulatory, financial, and reputational drivers pushing a sector to reduce emissions.
- A score of 3 reflects strong incentives such as legal mandates, cost savings, and stakeholder pressure, while a score of 1 reflects weak or unclear drivers for decarbonisation.

Motivation

- The higher the incentive to decarbonise, the more likely organisations are to prioritise time and resources for decarbonisation.

Key Insights

- Commercial offices & leisure centres were deemed as having the strongest incentive to decarbonise, driven by recent legislation and market pressures to reduce energy costs and

Market	Score	Explanation	Sources
New Build Commercial Offices	3	Commercial offices have a high incentive to decarbonise as all commercial offices must have a minimum EPC rating of E, increasing to C by 2028. There is also a growing demand for sustainable office spaces leading to higher rental/sale prices.	(67), (76)
Large Retail Areas	3	Retail spaces must have a minimum EPC rating of B by 2030. Additionally, customers are increasingly demanding sustainability and leadership in this space can improve access to Environmental, Social and Governance (ESG) loans.	(68), (77)
Food & Drink Manufacturing	2	The government's clean energy industries sector plan sets out a plan to decarbonise the UK's industry, with food and drink being a priority. Not only this, major retailers and international buyers require a low carbon source of food and drink (i.e. low carbon supply chain), causing food and drink manufacturers to set clear climate targets.	(69), (78)
Universities & Colleges	2	Universities face growing pressures to decarbonise, less from regulation than from strategic drivers such as student expectations - in 2022, 79% prioritised environmental action - and the need to lead in research, operations, and reputation, reinforced by rankings against the UN Sustainable Development Goals.	(70), (79)
Data Centres	2	Data centres are major energy users and eligible for Climate Change Levy discounts tied to efficiency targets, but their decarbonisation is only incentivised, not mandated, as firms can technically opt out despite strategic risks.	(71), (80)
Hospitals	2	NHS England have an internal Net Zero target of 2040 (earlier than the UK), and are part of the public sector, so they face growing expectations to decarbonise. However, their decarbonisation is driven more by internal strategy and funding availability than a strict legal mandate.	(72)
Secondary and Primary Schools	1	Schools have access to public funding for energy efficiency, but no legal decarbonisation requirements and a £13.8bn repair backlog mean sustainability is a low priority.	(74)
Leisure Centres	3	Leisure centres face strong decarbonisation incentives due to rising energy costs, with government support such as the £60m Swimming Pool Support Fund.	(75)

Existing Relationships

Description

- This KPI attempts to quantify the overall quality of the existing relationships that Bank Energi have with entities within each market.
- As the KPI is naturally highly qualitative and relies more on information from BankEnergi than from our own research, the scores serve more as a general indication.

Motivation

- The stronger or more numerous the existing relationships, the easier / more efficient it should be for BankEnergi to engage with and target the market.

Key Insights

- BankEnergi have existing case studies in Universities and Colleges as well as Commercial Offices.

Market	Score	Explanation	Sources
Commercial Offices	3	All scores for this KPI have been provided by or synthesised from discussions with BankEnergi.	
Large Retail Areas	1		
Food and Drink Batch Manufacturing	1		
Further and Higher Education	3		
Data Centres	2		
Hospitals	1		
Secondary and Primary Schools	1		
Leisure Centres	2		

Appetite for Risk

Description

- Appetite for risk measures how willing a sector is to adopt new technologies, business models, or operational changes to decarbonise.
- A score of 3 reflects a high tolerance for innovation and experimentation, while a score of 1 reflects a cautious or conservative approach due to operational, financial, or reputational constraints.

Motivation

- A high risk appetite supports innovation and experimentation, making sectors more open to new energy solutions.

Key Insights

- Further and Higher Education were scored as a 3, as they are typically trailblazers with a high appetite for innovation and willingness to trial new approaches.

Market	Score	Explanation	Sources
Commercial Offices	2	Innovation is embraced strategically, not aggressively. Companies tend to cautiously roll out innovation but only when the ROI and business case are clear.	
Large Retail Areas	2		
Food & Drink Manufacturing	2	Organisations would likely only be open to innovation if it makes financial and strategic sense as inflation, regulation, and cost-of-living pressures have led to financial constraints in the sector.	(81)
Universities & Colleges	3	UK universities are generally very open to innovation, especially relating to decarbonisation. Examples include UoBirmingham deploying 23,000 IoT sensors from Siemens, UoEdinburgh testing digital twins on campus buildings, and UoWarwick using Wilmott Dixon's Energy Synergy to decode how their buildings are used.	(82), (89)
Data Centres	3	Industry research suggests that data centres are always exploring new and innovative ways to run.	(83)
Hospitals	1	The NHS has a reputation for being unwilling to try innovative products or new ways of working, with regulation and 'poor alignment' halting innovation.	(84), (87)
Secondary and Primary Schools	1	Safeguarding requirements and privacy obligations significantly prevent schools from securing new innovation in technology. The public sector also often demonstrates a more conservative, slower pace of innovation compared to the private sector	(85), (88)
Leisure Centres	2	Leisure centres show a moderate appetite to risk. While there is open to innovation, including looking into innovative ways to decarbonise/reduce their energy usage, upgrading systems is constrained by tight LA budgets and staffing pressures.	(86)

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Appendix 2: Channel partners score criteria

Channel partner scoring - BMS

Criteria	Score	Explanation	Source
Influence over customer	3	BMS (Building Management System) customer relationships are typically structured around ongoing support, engagement, and value delivery, extending far beyond the initial system installation.	[1]
Complementary Value Proposition	3	BMS offer Higher operational performance which aligns with Befaster value proposition to optimise assets through flex energy loads	[2]
Regularity of Interaction	3	BMS vendors and service providers engage customers—such as facilities managers, building owners, or operators—through continuous service, proactive maintenance, training, and regular communication.	[3]
Ease of Access	3	BMS continuously tracks temperatures, equipment status, energy use, and can issue instant alarms for faults (e.g., HVAC failure, water leak). Remote diagnostics allow service teams or facility managers to respond quickly—often before occupants even notice a problem.	[4]
ESG goals Alignment	3	BMS have a high incentive to decarbonise as all commercial offices must have a minimum EPC rating of E, increasing to C by 2028.	[5]

Channel partner scoring - Facilities Managers

Criteria	Score	Explanation	Source
Influence over customer	3	Facility managers hold considerable influence over customers—both building users and, in many settings, the decision-makers within client organizations—due to their control over operational performance, user experience, and the adoption of systems like BMS.	[6]
Complementary Value Proposition	3	The Facilities Manager (FM) provides operational control and decision-making at the site level, enabling the physical implementation of energy and efficiency measures. BeFaster complements this by acting as the digital enabler—offering the data insights, automation tools, and market access required to optimize and monetize those measures.	[2]
Regularity of Interaction	3	Facilities managers frequently have long-term relationships with their customers, with service contracts ranging from short-term (2–3 years for simple services) to complex, integrated solutions lasting 5–10 years or more, and major public-private contracts occasionally extending 25–30 years.	[7]
Ease of Access	3	Facility managers score high on ease of access, because rapid, reliable support is core to their role.	[8]
ESG goals Alignment	3	Their responsibilities also include driving initiatives in energy management, sustainability, and corporate social responsibility, including waste reduction and green certifications. The SFMI measures the ESG performance of the Facilities Management sector.	[9],[10]

Channel partner scoring - ESCO

Criteria	Score	Explanation	Source
Influence over customer	3	They have an energy performance contract with the client to provide energy solutions , focused on provide energy efficiency and deliver guaranteed savings, Customers often rely on the ESCO's financial model to justify projects to boards or investors.	[11]
Complementary Value Proposition	3	By providing a financing mechanism for energy efficiency improvements, BeFaster strengthens its value proposition through the optimisation of renewable assets and energy loads within the flexibility market—ensuring that efficiency gains are not only implemented but also monetised and sustained	[2]
Regularity of Interaction	3	The duration of an EPC usually ranges from 5 to 10 years for a simple project, but it can extend to 20 or even 30 years or more for large projects	[11]
Ease of Access	2	Depending on contract conditions, ESCOs typically meet delivering timely, smooth support and simplifying the customer journey	[12]
ESG goals Alignment	3	A crucial aspect of ESCO work involves identifying energy savings, which aligns with ESG goals	[13]

Channel partner scoring – Energy Consultant

Criteria	Score	Explanation	Source
Influence over customer	2	Their influence is mostly strategic and advisory rather than operational	[14]
Complementary Value Proposition	3	They facilitate net zero planning, working alongside clients to maximize engagement, adoption, and strategic benefits from flexible energy assets and services	[2]
Regularity of Interaction	2	Customer engagement is one-off, potentially not recurring.	[2]
Ease of Access	2	Limited points of contact, consultants recommend and manage projects, but don't always implement directly—some operational follow-through depends on contractors or the FM team.	[15]
ESG goals Alignment	3	Energy consultancies help organizations reduce energy consumption, directly supporting their environmental, social, and governance (ESG) objectives.	[16]

Channel partner scoring – BMS Installers

Criteria	Score	Explanation	Source
Influence over customer	2	They physically install BMS Platforms but can offer innovation in low-carbon technologies for implementation by the customer.	[17]
Complementary Value Proposition	2	Designs & supplies BMS software/hardware equipment, they can incorporate the necessary technology to be compatible with BeFaster	[18]
Regularity of Interaction	2	As systems are managed by a third party, implementation is subject to the installation lead times	[2]
Ease of Access	2	Limited customer interaction – managed through FM	[2]
ESG goals Alignment	3	New Service line for Customers – added to existing Energy / Low Carbon Services	[2]

Channel partner scoring – DER Providers

Criteria	Score	Explanation	Source
Influence over customer	2	DER providers generally have significant influence on their customers, especially those who enter into long-term operational or service relationships, given operation dependence.	[19]
Complementary Value Proposition	2	Both serve roles in enabling distributed assets to deliver operational, financial, and system-level value through participation in flexibility and grid services markets. Some DER Providers aggregate, monitor, and control these assets, ensuring readiness and responsiveness for grid services.	[20]
Regularity of Interaction	2	Long-term relationships seen as the norm due to the nature of asset lifecycles and service contracts.	[21]
Ease of Access	2	DER providers increasingly offer constant monitoring and customer assistance in an accessible and user-friendly way, driven by advances in real-time digital monitoring, automated controls, and customer-facing platforms.	[22]
ESG goals Alignment	3	DER providers goals are strongly aligned with ESG goals. The fundamental aims of DERs—decarbonization, distributed energy access, enhanced grid resilience, and proactive community participation—directly support the three pillars of ESG.	[23]

Appendix 2: References

Number	Link
1	https://www.abmireland.com/perspectives/implementing-a-bms-analytics-package-to-deliver-optimised-energy-management
2	BankEnergi Value Proposition and Route to Market development, 2023.
3	https://www.abmireland.com/perspectives/implementing-a-bms-analytics-package-to-deliver-optimised-energy-management
4	https://www.cim.io/blog/what-is-a-building-management-system#how%20bms%20works
5	https://energyadvicehub.org/mees-regulations-for-commercial-properties-delayed-to-2028/
6	https://ffservices.co.in/blog/data-driven-decision-making-in-facility-management.php
7	https://www.cambridgenetwork.co.uk/news/deciding-duration-facilities-management-contract
8	https://limblecmms.com/learn/metrics/facility-kpis/?utm_source=chatgpt.com
9	https://www.acclaro-advisory.com/sfmi/about-the-sfmi/
10	https://comparesoft.com/facilities-management-software/facilities-manager/
11	https://beflexible.eu/wp-content/uploads/2024/04/BeFlexible-D1.2-Framework-for-Flexibility-Centric-Energy.pdf
12	https://www.iea.org/reports/energy-service-companies-escos-2/esco-contracts?utm_source=chatgpt.com
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22	https://enode.com/blog/guide/distributed-energy-resources#how-can-my-company-engage-customers-with-der-apps-and-service
23	https://senecaesg.com/insights/decentralized-energy-production-esg-value-in-2025/