



Department
of Energy &
Climate Change

Research into businesses that were not certified Green Deal suppliers

Research instruments

December 2014

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Any enquiries regarding this publication should be sent to us at HouseholdEnergyEfficiencyResearch@decc.gsi.gov.uk.

The views expressed in this report are those of the authors, not necessarily those of the Department of Energy and Climate Change (nor do they reflect Government policy).

1. Quantitative survey of suppliers

Type	
Assessor	1
Installer	2

Email sent	
Yes	1
No	2

Source of contact	
Domestic Energy Performance Certificate Register	1
Microgeneration Certification Scheme	2
Gas Safe Register	3

ASK TO SPEAK TO NAMED CONTACT IF GIVEN, OR

ASK TO SPEAK TO OWNER/PROPRIETOR

Good morning/afternoon, my name is XXX and I am calling from BMG Research, an independent research organisation. We are undertaking a survey on behalf of the Department of Energy and Climate Change (DECC) to research the wider energy efficiency market. This research is part of an independent evaluation of the Green Deal (GD) and Energy Companies Obligation (ECO).

[ADD IF EMAIL SENT: You should have received an email introducing the evaluation and asking for your participation in this survey of (IF TYPE = 1, domestic energy assessors; IF TYPE = 2, installers of energy efficiency and renewable energy measures) that are not already Green Deal certified]

[ADD IF EMAIL NOT SENT: This is a survey of (IF TYPE = 1, domestic energy assessors; IF TYPE = 2, installers of energy efficiency and renewable energy measures) that are not already Green Deal certified.

The purpose of the survey is to understand the energy efficiency market in Great Britain, including views of government policies such as Green Deal and ECO, and to establish steps that can be taken to improve the operation of the market and ensure policies and programmes are working effectively. We will also be asking your views on proposed changes to the Green Deal

and Energy Companies Obligation announced by the Chancellor recently. These proposed changes are subject to consultation, so you can also express your views by responding to the consultation.

This survey takes the form of a telephone interview lasting approximately 15-20 minutes. Any information you provide will be treated in strictest confidence, and the answers you give will not be attributed to you or your business.

REASSURANCES TO USE AS NEEDED

- **We work strictly within the Market Research Society Code of Conduct.**
- **Your contact details have been sourced from the [SOURCE OF CONTACT]**
- **The Government department responsible for commissioning this work is DECC.**

OUTCOME CODES

CONTINUE	1
TRANSFER TO APPROPRIATE RESPONDENT	2
NOT AN ENERGY ASSESSOR/INSTALLER	3
GD CERTIFIED ALREADY	4
REFUSED	5
HARD APPOINTMENT	6
SOFT APPOINTMENT	7
UNOBTAINABLE NUMBER (DEAD LINE)	8
OTHER (SPECIFY)	9

Section A: Confirming lack of involvement with Green Deal

ASK ALL

A1. **Firstly, for which types of building do you carry out** (IF TYPE 1: **assessments or surveys**; IF TYPE 2; **installations**)? MULTICODE. READ OUT.

1. **Domestic**
2. **Non-domestic**
3. **Other** (SPECIFY)
4. Don't know

IF NON-DOMESTIC ONLY (CODE 2 AND NO OTHER), THANK AND CLOSE

A2. **Before this interview, had you ever heard of the Green Deal?**

1. Yes
2. No
3. Don't know

A3. **And had you heard about the Energy Companies Obligation, also known as ECO?**

1. Yes
2. No
3. Don't know

ASK IF HEARD OF GD (A2 '1'). OTHERS GO TO FILTER BEFORE A11

A4. **Can I ask whether you are currently certified to provide** (IF TYPE 1: **assessments**; IF TYPE 2; **installations**) **under the Green Deal?**

1. Yes – GD certified
2. No – not GD certified
3. Don't know

IF GD CERTIFIED (A4 '1'), THANK AND CLOSE

A5. **Is your organisation certified to provide any of these other services under the Green Deal?**
READ OUT. MULTICODE OK 1-3

1. (TYPE 1 ONLY) **Certified Green Deal Installer**
2. (TYPE 2 ONLY) **Certified Green Deal Assessor Organisation**
3. **Certified Green Deal Provider**
4. None of these
5. Don't know

IF OTHER GD SUPPLIER (A5 '1-3'), THANK AND CLOSE

A6. **Are you currently applying to become a Green Deal certified (IF TYPE 1: assessor organisation or advisor; IF TYPE 2; installer), or have you been a Green Deal certified (IF TYPE 1: assessor organisation or advisor; IF TYPE 2; installer) in the past? SINGLE CODE ONLY**

1. Currently becoming GD certified
2. Used to be GD certified
3. Neither of these
4. Don't know

ASK IF A PREVIOUS GD SUPPLIER (A6 '2'). OTHERS GO TO A9 FILTER

A7. **When did you become certified as a Green Deal (IF TYPE 1: assessor organisation or advisor; IF TYPE 2; installer)?**

1. Within the last month
2. 1-2 months ago
3. 2-3 months ago
4. 3-6 months ago
5. 6-12 months ago
6. More than 12 months ago
7. Don't know

A8. **Why do you no longer provide Green Deal (IF TYPE 1: assessments; IF TYPE 2; installations)? WRITE IN**

Don't know X
Refused Y

ASK IF NEVER BEEN GD CERTIFIED (A6 = 3-4). OTHERS GO TO FILTER BEFORE A11

A9. **Have you ever tried to become a Green Deal certified (IF TYPE 1: assessor organisation or advisor; IF TYPE 2; installer)? TYPE 1 = M/C OK, TYPE 2 = S/C ONLY**

1. (TYPE 1) Yes, GD Assessor Organisation
2. (TYPE 1) Yes, GD Advisor
3. (TYPE 2) Yes, GD installer
4. No
5. Don't know

ASK IF EVER TRIED TO BE GD CERTIFIED (A9=1-3). OTHERS GO TO FILTER BEFORE A11

A10. **Why didn't you become an authorised (IF A9/1 SINGLE CODE: assessor organisation; IF A9/2 SINGLE CODE: advisor; IF A9/1 AND 2: assessor organisation and advisor; IF A9/3: installer)? DO NOT PROMPT. M/C 1-3**

1. Withdrew application
2. (ASSESSORS/ ADVISORS) Could not meet the standards required
3. (INSTALLERS) Could not gain PAS 2030 certification
4. Other (SPECIFY)
5. Don't know
6. Refused

ASK INSTALLERS (TYPE 2) ONLY. OTHERS GO TO FILTER BEFORE A12

A11. Are you currently certified or applying for certification to PAS 2030?

1. Yes
2. No
3. Don't know
4. Refused

ASK IF HEARD OF ECO (A3 '1'). OTHERS GO TO FILTER BEFORE A13

A12. Do you [or your business] (TYPE 1: undertake any property surveys or energy assessments for; TYPE 2: install measures under) the Energy Companies Obligation (ECO)?

1. Yes
2. Not yet but intend to
3. No but may consider
4. No
5. Don't know
6. Don't know what ECO is

ASK INSTALLERS (TYPE 2) ONLY. OTHERS GO TO B1

A13. Were you involved in delivering services under the CERT / CESP programmes?

1. Yes
2. No
3. Don't know

Section B: Business Profiles

I would now like to ask some questions about your business

ASK ALL

B1. **How many people, approximately, including yourself are employed by your business in Great Britain?**

PROMPT: **Do not include sub-contractors**

PROMPT: **Include both full-time and part-time staff**

PROMPT: **Partners and co-owners should be included**

WRITE IN EXACT NUMBER 0-9,999

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Don't know X

ASK IF DK/REF AT B1. OTHERS GO TO FILTER BEFORE B2

B1a. **Can I check, does your business employ more than one person, including yourself?**

1. Yes
2. No

ASK ASSESSORS IF B1>1 OR B1A/1. OTHERS GO TO B3

B2. **And how many energy assessors, if any, does your company employ?**

WRITE IN EXACT NUMBER 0-9,999

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Don't know X

Refused Y

ASK ALL

B3. **Do you use sub-contractors to (TYPE 1: undertake any property surveys or energy assessments; TYPE 2: install measures) for your business?**

- 1 Yes
- 2 No
- 3 Don't know
- 4 Refused

ASK ALL

B4. **When was your business established? WRITE IN YEAR**

Year:	
-------	--

Don't know X

Refused Y

ASK ALL

- B5. **What, approximately, was your annual turnover in the last financial year (2012/13)?** IF NOT WILLING TO PROVIDE EXACT FIGURE, READ OUT RANGES UNTIL ANSWER GIVEN. SINGLE CODE ONLY.

Less than £35,000	1
£35,000 to £72,999	2
£73,000 to £249,999	3
£250,000 to £499,999	4
£500,000 to £999,999	5
£1 million to £1.99 million	6
£2 million to £4.99 million	7
£5 million to £9.99 million	8
£10 million to £24.99 million	9
£25 million or more	10
Don't know	11
Refused	12

- B6. **Can you please tell me the postcode of the office or site you normally work from?** WRITE IN (TRY TO COLLECT FIRST PART OF POSTCODE OR LOCATION IF UNKNOWN OR REFUSE FULL POSTCODE)

Don't know X
Refused Y

- B7. (ASSESSORS) **In which of the following regions are you willing to carry out energy surveys?** READ OUT. MULTICODE OK 1-12

(INSTALLERS) **In which of the following regions are you willing to carry out installations?** READ OUT. MULTICODE OK 1-12

1. North East
2. North West
3. Yorkshire and the Humber
4. East Midlands
5. West Midlands
6. East of England
7. London
8. South East
9. South West
10. Scotland
11. Wales
12. Other (SPECIFY)
13. Don't know

ASK INSTALLERS ONLY. ASSESSORS GO TO B10

B8. **I would now like to ask a few details about your business' work as an installer. Which of the following measures does your business install?** READ OUT. ROTATE ORDER OF MEASURES EXCEPT 'OTHER' IS ALWAYS LAST. MULTICODE OK 1-11

1. **Internal solid wall insulation**
2. **External solid wall insulation**
3. **Cavity wall insulation**
4. **Loft insulation**
5. **Boilers – gas**
6. **Boilers – oil**
7. **Solar PV**
8. **Solar thermal**
9. **Air source heat pumps**
10. **Ground source heat pumps**
11. **Biomass boilers**
12. **Other measures**
13. All measures
14. No measures/Not applicable
15. Don't know

ASK INSTALLERS IF A12=1 (DELIVERING ECO INSTALLATIONS). OTHERS GO TO B10

B9. **And, which of these measures has your business installed for the Energy Companies Obligation (ECO)?** READ OUT 1-7. MULTICODE OK 1-7

1. **Internal solid wall insulation**
2. **External solid wall insulation**
3. **Hard-to-treat cavity wall insulation**
4. **Regular cavity wall insulation**
5. **Loft insulation**
6. **Boilers**
7. **Other measures**
8. No measures/Not applicable
9. Don't know

ASK ALL

B10. (ASSESSORS) **I would now like to ask a few details about [IF B1=1 OR B1A/2: your work / IF B1>1 OR B1A/1: your business' work] as an Energy Assessor. In what year did [IF B1=1 OR B1A/2: you / IF B1>1 OR B1A/1: your business] first start doing energy assessments?**
WRITE IN YEAR

(INSTALLERS) **In what year did your business first start doing [IF B8=1-6 ONLY: energy efficiency / IF B8 =7-11 ONLY: renewable energy / IF B8 =1-6 AND 7-11 OR B8 =12: energy efficiency or renewable energy] installations?** WRITE IN YEAR

Year:	
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Don't know X

Refused Y

B11. Do you help arrange credit or finance options for your customers to finance installations?

- 1 Yes
- 2 No
- 3 Don't know

ASK IF B11=1. OTHERS GO TO FILTER BEFORE B17

B12. What credit or finance options do you offer your customers? READ OUT. MULTICODE OK 1-5.

- 1. **Your company's own finance or loan**
- 2. **Finance from other companies**
- 3. **Help them to get cashback**
- 4. **Advise them of subsidies or schemes available to them**
- 5. **(ONLY ASK INSTALLERS IF B8=7-11) Finance related to the installation of renewable heat**
- 6. **Any other? (SPECIFY)**
- 7. Don't know
- 8. Refused

ASK IF ANSWER B12=4. OTHERS GO TO B14

B13. What Government subsidies or schemes do you advise customers on? WRITE IN.

Don't know X
Refused Y

ASK IF B11=1. OTHERS GO TO FILTER BEFORE B17

B14. Do you ever advise customers about combining more than one type of finance to help pay for installations?

- 1. Yes
- 2. No
- 3. Don't know

ASK INSTALLERS ONLY. ASSESSORS GO TO B18

B17. Do you offer any follow up advice or services after the installation has been completed? MULTICODE. DO NOT READ OUT. IF YES, PROBE FOR TYPE OF ADVICE / SERVICES

- 1. Annual servicing
- 2. Advice and guidance on how to use
- 3. Provide contact details
- 4. Other (SPECIFY)
- 5. No follow-up advice or services offered
- 6. Don't know

FILTER AS B17

B17a. Do you belong to any other certification schemes? DO NOT READ OUT. MULTICODE 1-3.

1. Trustmark
2. Competent Persons Scheme
3. Microgeneration Certification Scheme (MCS)
4. Other (SPECIFY)
5. None
6. Don't know
7. Refused

ASK ALL

B18. I would like to ask about your relationships, if any, with other businesses.

Is your business sub-contracted to provide (IF TYPE 1: domestic energy assessments; IF TYPE 2: installations) for any other organisations as part of their supply chain?

1. Yes
2. No
3. Don't know

ASK IF B18=1. OTHERS GO TO C1

B19. (ASSESSORS) Do you undertake domestic energy assessments on behalf of any of the following? READ OUT. MULTICODE 1-8. ROTATE.

(INSTALLERS) Do you undertake [IF B8 =1-6 ONLY: energy efficiency / IF B8 = 7-11 ONLY: renewable energy / IF B8 =1-6 AND 7-11 OR B8=12: energy efficiency and renewable energy] installations on behalf of any of the following? READ OUT. MULTICODE 1-8. ROTATE.

1. (ASSESSORS ONLY) **Installers of energy efficiency measures, heating systems or renewable energy technologies**
2. (INSTALLERS ONLY) **Other installers**
3. **Local authorities**
4. **Energy companies**
5. **Property firms or house builders**
6. **Letting agents/landlords**
7. **Green Deal Providers**
8. **Green Deal Assessor Organisations**
9. (ADD IF ASSESSOR: **Other**) **energy assessor companies**
10. **Other (SPECIFY)**
11. None of these
12. Don't know
13. Refused

B20. Do you undertake (IF TYPE 1: energy assessments; IF TYPE 2: installations) for ECO on behalf of any of these organisations?

1. Yes
2. No
3. Don't know

Section C: Non-participation in the Green Deal (and ECO) market

ASK ALL HEARD OF GD (A2 '1'). OTHERS GO TO FILTER BEFORE C8

C1. **I would now like to ask a few questions about your views on the Green Deal. How did you first hear about the Green Deal programme? DO NOT READ OUT. MULTICODE**

1. My customers
2. Companies that I work for
3. (ASSESSORS ONLY) Other assessors / industry contacts
4. (INSTALLERS ONLY) Other installers/industry contacts
5. Trade associations
6. Trade magazine
7. Newspaper article
8. Internet
9. Television (news/advert)
10. Radio (news/advert)
11. DECC website
12. Through training
13. Other (SPECIFY)
14. Can't remember

C2. (ASSESSORS) **Which of these are reasons for NOT becoming a Green Deal [IF B1=1 OR B1A/2: Advisor OR IF B1>1 OR B1A/1: Assessor Organisation] so far? READ OUT. MULTICODE OK 1-10.**

(INSTALLERS) **What are your reasons for NOT becoming a Green Deal Installer so far? READ OUT. MULTICODE OK 1-10.**

1. **Too much work or time to become certified**
2. **Costs of certification**
3. **Training costs**
4. **Low demand for Green Deal**
5. **Market is too competitive**
6. **Uncertainty associated with the policy**
7. **Too complicated to become certified**
8. **Need more information / Don't know enough**
9. **Satisfied with existing work**
10. **Any other reason (SPECIFY)**
11. Don't know
12. Refused

ASK IF MENTIONED MORE THAN ONE REASON IN C2. OTHERS GO TO C4

- C3. (ASSESSORS) **Of all the reasons you have mentioned, what is the main reason for you NOT yet becoming a Green Deal** [IF B1=1 OR B1A/2: **Advisor** OR IF B1>1 OR B1A/1: **Assessor Organisation**]? READ OUT THOSE MENTIONED IN C2. SINGLE CODE ONLY.

(INSTALLERS) **Of all the reasons you have mentioned, what is the main reason for you NOT yet becoming a Green Deal Installer?** READ OUT THOSE MENTIONED IN C2. SINGLE CODE ONLY.

1. Too much work or time to become certified
2. Costs of certification
3. Training costs
4. Low demand for Green Deal
5. Market is too competitive
6. Uncertainty associated with the policy
7. Too complicated to become certified
8. Need more information / Don't know enough
9. Satisfied with existing work
10. 'Others' specified above
11. Don't know

NB: C3a DELETED

ASK ALL HEARD OF GD

- C4. (ASSESSORS) **While you are currently not registered as a Green Deal** [IF B1=1 OR B1A/2: **Advisor** OR IF B1>1 OR B1A/1: **Assessor Organisation**], **would you consider becoming one in the future?**

(INSTALLERS) **While you are currently not registered as a Green Deal Installer, would you consider becoming one in the future?**

1. Yes
2. No
3. Don't know

- C5. (ASSESSORS) **What do you consider would be the benefits of becoming a Green Deal** [IF B1=1 OR B1A/2: **Advisor** OR IF B1>1 OR B1A/1: **Assessor Organisation**]? DO NOT READ OUT. MULTICODE OK 1-8. PROMPT: **Any other?**

(INSTALLERS) **What do you consider would be the benefits of becoming a Green Deal Installer?** DO NOT READ OUT. MULTICODE OK 1-8. PROMPT: **Any other?**

1. Diversify/enter new markets
2. Improve offer
3. Increase revenue
4. Improve reputation
5. Secure work under ECO
6. Access customers for Renewable Heat Incentive (RHI)
7. Other (SPECIFY)
8. Don't know
9. Refused

ASK IF MORE THAN ONE MENTIONED AT C5 (1-8). OTHERS GO TO C6
C5a. **And what would be the main benefit?** SINGLE CODE ONLY.

- 1. Diversify/enter new markets
- 2. Improve offer
- 3. Increase revenue
- 4. Improve reputation
- 5. Secure work under ECO
- 6. Access customers for Renewable Heat Incentive (RHI)
- 7. Other (SPECIFY)
- 8. Don't know
- 9. Refused

ASK ALL HEARD OF GD

C6. (ASSESSORS) **What if anything might help you to [IF C4=1, become] [IF C4=2-3, consider becoming] a Green Deal [IF B1=1 OR B1A/2: Advisor OR IF B1>1 OR B1A/1: Assessor Organisation]?** WRITE IN

(INSTALLERS) **What if anything might help you to [IF C4=1, become] [IF C4=2-3, consider becoming] a Green Deal Installer?**

Nothing would make me consider becoming GD certified W
Don't know X
Refused Y

ASK ALL HEARD OF GD EXCEPT C6/W, OTHERS GO TO FILTER BEFORE C7a

C6a. (ASSESSOR) **Would it be useful to receive more information or support on becoming a Green Deal [IF B1=1 OR B1A/2: Advisor OR IF B1>1 OR B1A/1: Assessor Organisation]?**

(INSTALLER) **Would it be useful to receive more information or support on becoming a Green Deal Installer?**

- 1. Yes
- 2. No
- 3. Don't know

ASK IF C6a=1. OTHERS GO TO FILTER BEFORE C7a

C7. **What type of support or information would you find useful?** WRITE IN

Don't know X
Refused Y

ASK ALL INSTALLERS HEARD OF GD ONLY. ASSESSORS GO TO C7b

C7a. **Would you be more or less likely to become a Green Deal Installer if the certification standard, PAS 2030 covered all installation work you undertook?** SINGLE CODE.

INTERVIEWER PROMPT if NECESSARY: **By that I mean, if PAS 2030 covered non-Green Deal work.**

1. More likely
2. Less likely
3. No impact / Not more or less likely
4. Don't know
5. Refused

ASK ALL HEARD OF GD

C7b. **Did you hear the announcements related to the Green Deal and ECO that were made by the Chancellor in the autumn statement?**

1. Yes
2. No
3. Don't know

ASK IF HEARD ANNOUNCEMENTS (C7b '1'). OTHERS GO TO FILTER BEFORE C8

C7c. (ASSESSORS) **Have the announcements made you more or less likely to become a Green Deal** [IF B1=1 OR B1A/2: **Advisor** OR IF B1>1 OR B1A/1: **Assessor Organisation**]? SINGLE CODE.

(INSTALLERS) **Have the announcements made you more or less likely to become a Green Deal Installer?** SINGLE CODE

1. More likely
2. Less likely
3. No impact / Not more or less likely
4. Don't know
5. Refused

ASK if C7c=2. OTHERS GO TO C7e

C7d. **And why is that?** WRITE IN

Don't know	X
Refused	Y

ASK ALL THAT HEARD THE ANNOUNCEMENTS (C7b '1')

C7e. **And, do you think the announcements will have an impact on your business in any other way?** SINGLE CODE. DON'T READ OUT

1. Yes
2. No
3. Don't know

ASK IF THEY THINK IT WILL HAVE AN IMPACT (ASK IF C7e=1). OTHERS GO TO FILTER BEFORE C8

C7f. **How do you think the announcements will impact on your business?** WRITE IN

Don't know X
Refused Y

ASK IF HEARD OF ECO (A3=1). OTHERS GO TO D1

C8. **I would now like to ask you a number of questions about the Energy Companies Obligation. How did you first hear about ECO?** DO NOT READ. MULTICODE OK 1-11

1. My customers
2. Companies that I work for
3. (ASSESSORS ONLY) Other assessors / industry contacts
4. (INSTALLERS ONLY) Other installers/industry contacts
5. Trade associations
6. Trade magazine
7. Newspaper article
8. Internet
9. Television (news/advert)
10. Radio (news/advert)
11. DECC website
12. Through training
13. Other (SPECIFY)

ASK IF HEARD OF ECO BUT NOT DELIVERED SERVICES (A12 =2-6). OTHERS GO TO C13

C9 **What have been the reasons for you NOT doing** (IF TYPE 1: **energy assessments**; IF TYPE 2: **installations**) **under ECO?** READ OUT. MULTICODE OK 1-6

1. (INSTALLERS ONLY) **The measures I install are not covered by the ECO**
2. **I cannot find ECO work**
3. **Lack of demand for ECO**
4. **Lack of understanding/information about ECO**
5. (INSTALLERS ONLY) **I don't have the skills**
6. **Can't make a profit**
7. **I already have sufficient work**
8. **Other** (SPECIFY)
9. Don't know
10. Refused

ASK IF MENTIONED MORE THAN ONE REASON IN C9. OTHERS GO TO FILTER BEFORE C10a

C10. **Of all the reasons you have mentioned, what is the main reason for you NOT doing (IF TYPE 1: energy assessments; IF TYPE 2: installations) under the ECO? SHOW REASONS GIVEN AT C9. SINGLE CODE ONLY. PROMPT IF NECESSARY**

1. (INSTALLERS ONLY) The measures I install are not covered by the ECO
2. I cannot find ECO work
3. (INSTALLERS ONLY) I don't have the skills
4. Can't make a profit
5. I already have sufficient work
6. Other at C9
7. Don't know
8. Refused

ASK INSTALLERS ONLY IF C9=1. OTHERS GO TO C11.

C10a. **You said the measures you install are not covered under the ECO scheme. Have you considered expanding your business to include some of these ECO measures?**

1. Yes
2. No
3. Don't know

ASK IF HEARD OF ECO BUT NOT DELIVERED SERVICES (A12 =2-6). OTHERS GO TO FILTER BEFORE C13

C11. **Would you consider doing (TYPE 1 = surveys; TYPE 2 = installations) under the ECO in the future?**

1. Yes
2. No
3. Don't know

C12. **What if anything might help you to [IF C11=1, do] [IF C11=2-3, consider doing] (IF TYPE 1: surveys; IF TYPE 2: installations) under ECO? WRITE IN**

Nothing would make me consider doing surveys/installations under the ECO	W
Don't know	X
Refused	Y

ASK IF A12 =1 (THOSE WHO HAVE DELIVERED ECO INSTALLATIONS). OTHERS GO TO D1

C13. **Do you feel you have missed out on any ECO work because you are not Green Deal authorised? SINGLE CODE ONLY**

1. Yes
2. No
3. Don't know

Section D: Nature of the energy efficiency demand and supply outside the Green Deal (and ECO) market

ASK ALL

- D1. (ASSESSORS) **I would now like to ask some questions about the volume of your current energy assessment activity. Who is responsible for generating leads for this work?** IF NECESSARY: PROMPT: **Who is responsible for finding customers?** DO NOT READ OUT. MULTICODE OK 1-10. PROMPT: **Any others?**

(INSTALLERS) **I would now like to ask some questions about your current-installation activity. Who is responsible for generating leads for this work?** IF NECESSARY, PROMPT: **Who is responsible for finding customers?** DO NOT READ OUT. MULTICODE OK 1-10. PROMPT: **Any others?**

1. You / your company
2. (Other) Energy Assessors
3. (ASSESSORS ONLY) Estate agents
4. (Other) Installers
5. Other third party suppliers
6. Local authorities
7. Registered social landlords
8. Energy companies
9. Respond to direct enquiries from public
10. Lead generation company
11. Others (SPECIFY)
12. Don't know
13. Refused

ASK IF THEY ARE RESPONSIBLE FOR GENERATING LEADS (D1=1). OTHERS GO TO FILTER BEFORE D2

- D1a. **How does your business first contact potential customers?** DO NOT PROMPT. MULTICODE OK 1-7

1. Door-to-door sales
2. Telesales / texting
3. Print marketing
4. TV/radio advertising
5. Email/e-newsletter
6. Internet / website /social media
7. Lead generation company
8. Previous customers revisited
9. Other (SPECIFY)
10. Don't, consumers contact the business
11. Don't know
12. Refused

ASK IF MULTIPLE RESPONSES TO D1a SHOWING ONLY OPTIONS CHOSEN AT D1a.
OTHERS GO TO D1c

D1b. **What do you find to be the most effective way of first contacting potential customers?**
SINGLE CODE ONLY. DO NOT PROMPT

1. Door-to-door sales
2. Telesales / texting
3. Print marketing
4. TV/radio advertising
5. Email/e-newsletter
6. Internet /website /social media
7. Lead generation company
8. Previous customers revisited
9. (OTHER RESPONSE FROM D1a)
10. Consumers contacting the business
11. Other (SPECIFY)
12. Don't know
13. Refused

ASK IF THEY OR THEIR BUSINESS ARE RESPONSIBLE FOR GENERATING GD LEADS
(D1=1).

D1c. **Do you target specific types of customers?** IF YES: **What type of customer or property do you target?** WRITE IN

Don not target specific customers	W
Don't know	X
Refused	Y

ASK ALL HEARD OF GD (A2 '1'). OTHERS GO TO D4

D2. **Have you changed the way you generate work since the introduction of the Green Deal in January 2013?**

1. Yes
2. No
3. Don't know

ASK IF D2=1. OTHERS GO TO D4

D3. **How have you changed the way you generate work since the introduction of the Green Deal?** WRITE IN

Don't know	X
Refused	Y

ASK ALL

D4. (ASSESSORS) **Roughly how many domestic energy assessments did [IF B2=1 you; IF B1>1 OR B1A/1 your business] carry out in the last six months? WRITE IN**

(INSTALLERS) **Roughly how many domestic installations did your business carry out in the last six months? WRITE IN**

ASK IF DELIVERED ECO (A12 '1') AND IF D4>0. DO NOT ASK IF D4=DK. OTHERS GO TO D6

D5. (ASSESSORS) **And how many of those domestic energy assessments were for ECO? WRITE IN**

(INSTALLERS) **And how many of those domestic installations were funded solely by ECO? WRITE IN**

ASK ALL INSTALLERS THAT HAVE DELIVERED ECO (A12 '1') AND D4>0. DO NOT ASK IF D4=DK. ASSESSORS GO TO D6

D5a **And how many of those domestic installations were funded from a combination of ECO and other sources?**

	Total	Don't know
(D4) Domestic – last 6 months		X
(D5) ECO – last 6 months		X
(D5a) ECO/other sources – last 6 months		X

ASK ALL

D6. (ASSESSORS) **Compared to 2012, was the total number of assessments [IF B1=1 OR B1A/2: you completed / IF B1>1 OR B1A/1: your business completed] in 2013 higher, lower or about the same? SINGLE CODE ONLY**

(INSTALLERS) **Compared to 2012, was the total number of installations your business completed in 2013 higher, lower or about the same? SINGLE CODE ONLY**

1. Higher
2. Lower
3. About the same
4. Don't know
5. Refused

ASK IF HIGHER AT D6 (D6=1). OTHERS GO TO FILTER BEFORE D7a

D7. **Why do you think it is higher?** MULTICODE OK. DO NOT READ OUT

1. Improved housing market
2. Improved consumer awareness of energy efficiency
3. Introduction of the Green Deal
4. Introduction of the ECO
5. Increase in energy bills is increasing demand
6. Introduction of the domestic renewable heat incentive (RHI)
7. Changes to our own business processes
8. Other (SPECIFY)
9. Don't know
10. Refused

ASK IF LOWER AT D6 (D6=2). OTHERS GO TO FILTER BEFORE D10

D8. **Why do you think it is lower?** MULTICODE OK. DO NOT READ OUT

1. Introduction of the Green Deal
2. Introduction of the ECO
3. Recession
4. Introduction of the domestic renewable heat incentive (RHI)
5. Increased competition
6. Lower feed-in tariff
7. Other (SPECIFY)
8. Don't know
9. Refused

NO D9

ASK IF D6=1, (IF DEMAND HAS INCREASED). OTHERS GO TO D11

D10. (ASSESSORS) **In which of these ways have you managed to cope with the extra demand for energy assessments?** READ OUT 1-7. MULTICODE OK

(INSTALLERS) **In which of these ways have you managed to cope with the extra demand for installations?** READ OUT 1-7. MULTICODE OK

1. **Worked longer hours**
2. **Used new technology to do (TYPE 1: assessments; TYPE 2: installations) faster**
3. **Used more experienced staff**
4. **Recruited new staff or expanded your business**
5. **Put in place extra sub-contracting arrangements**
6. **Been more selective over the (TYPE 1: energy assessments; TYPE 2: installations)/work you take on**
7. Other (SPECIFY)
8. None of these
9. Don't know

ASK IF D6=2 (DEMAND HAS DECREASED). OTHERS GO TO D12a

D11. **Why do you think there is reduced demand for (TYPE 1: energy assessments; TYPE 2: installations)? DO NOT PROMPT. MULTICODE OK 1-5**

1. Consumers preferring to use Green Deal (TYPE 1: assessors; TYPE 2: installers)
2. Increased competition as new (TYPE 1: assessors; TYPE 2: installers) enter the market
3. Can't get ECO work
4. (INSTALLERS ONLY) Measures I install are not funded under ECO
5. Other Government schemes that have finished (e.g. CERT/CESP)
6. Fewer house sales
7. Lower feed-in tariff
8. Other (SPECIFY)
9. Don't know
10. Refused

D12. **What effect, if any, has this had on your business? DO NOT READ OUT. MULTICODE OK 1-4.**

1. Had to reduce the size of the workforce
2. Had to increase resources for business development / marketing activities
3. Had to move out of the market
4. Other (SPECIFY)
5. No consequences to date
6. Don't know
7. Refused

ASK ALL ASSESSORS. INSTALLERS GO TO D12c

D12a. **What proportion of the domestic energy assessments conducted by [IF B1=1 OR B1A/2: you / IF B1>1 OR B1A/1: your business] in the last 6 months do you estimate were related to people moving or selling their property? WRITE IN PERCENTAGE 0-100**

			%
--	--	--	---

Don't know X
Refused Y

ASK IF D12a NOT 100%, OTHERS GO TO FILTER BEFORE D12c

D12b. **And what proportion of these domestic energy assessments in the last 6 months, do you estimate were commissioned to understand the energy efficiency of their home, excluding moving and selling? WRITE IN PERCENTAGE 0-100**

			%
--	--	--	---

Don't know X
Refused Y

ASK ALL INSTALLERS, ASSESSORS GO TO FILTER BEFORE D13

D12c. **Have you undertaken any installations for customers with a Green Deal Advice Report?**

1. Yes
2. No
3. Don't know

ASK ALL WHO HAVE UNDERTAKEN INSTALLATIONS FOR ECO AND WITH A GDAR (ASK IF A12 =1 AND D12c=1). OTHERS GO TO D13

D12d. **What proportion of the installations you've undertaken for customers with a GD Advice Report were for ECO?** WRITE IN PERCENTAGE 0-100

			%
--	--	--	---

Don't know X
Refused Y

ASK ALL ASSESSORS AND INSTALLERS IF DELIVER PRIORITY MEASURES (B8 =1-3 OR 7-11 OR 13). OTHERS GO TO D13a

D13. (INSTALLERS) **Do you think there are sufficient installers of [INSERT ONE TECHNOLOGY FROM LIST AT RANDOM FROM B8 (1-3 OR 7-11) THAT HAS BEEN MENTIONED] to meet current demand?** SINGLE CODE ONLY.

(ASSESSORS) **Do you think there are sufficient energy assessors in the areas you work in to meet current demand?**

1. Yes
2. No
3. Don't know

ASK IF D13=2. OTHERS GO TO D17.

D14. **What impact does this under capacity have on your business?** WRITE IN

--

Don't know X
Refused Y

NB: NO D15-D16

IF NOT HEARD OF GD (A2/2-3) READ OUT:

“The Green Deal is a Government initiative to support the uptake of energy-efficiency measures, through a unique finance mechanism that avoids the need to pay upfront or take out a conventional loan. Instead these measures are financed through a loan secured against the property which is paid off through savings in the property’s electricity bills. Green Deal assessors and installers must meet standards and comply with a code of practice in order to become certified to deliver Green Deal assessments and installations. This approach aims to achieve consistent, high standards and provide consumers with confidence that the scheme is properly regulated and will provide them with real benefits.”

ASK ALL

D17. (ASSESSORS) **I am going to read out some statements about the potential impacts of the Green Deal on the wider energy assessment market. Can you tell me how much you agree or disagree with each statement?** READ OUT EACH STATEMENT, PROBE FOR (DIS) AGREE STRONGLY OR TEND TO (DIS) AGREE. ROTATE STATEMENTS.

(INSTALLERS) **I am going to read out some statements about the potential impacts of the Green Deal on the wider [IF B8=1-6 ONLY: energy efficiency / IF B8=7-11 ONLY: renewable energy / IF B8=1-6 AND 7-11 OR B8=12: energy efficiency and renewable energy] installation market. Can you tell me how much you agree or disagree with each statement?** READ OUT EACH STATEMENT, PROBE FOR (DIS) AGREE STRONGLY OR TEND TO (DIS) AGREE. ROTATE STATEMENTS.

	Strongly disagree	Tend to disagree	Neither agree nor disagree	Tend to agree	Strongly agree	Don't know
Improves standards amongst fellow (TYPE 1 = assessors; TYPE 2 = installers)	1	2	3	4	5	X
Drives innovation in the market	1	2	3	4	5	X
Increases consumer awareness	1	2	3	4	5	X

ASK ASSESSORS ONLY. INSTALLERS GO TO D24

D18. **I would now like to ask some questions about the fees you charge. Do you charge a fee to the home occupier for your domestic energy assessments?**
SINGLE CODE ONLY

1. Yes
2. No
3. Depends / sometimes
4. Don't know

ASK IF NOT CHARGING A FEE (IF D18=2) OR SOMETIMES CHARGE A FEE (IF D18=3). OTHERS GO TO FILTER BEFORE D21

D19. **Why do you not charge a fee for** (ADD IF D18=3: **some**) **energy assessments?** MULTICODE OK 1-3. DO NOT PROMPT

1. Loss-leader to generate new business
2. Assessments are paid for by someone else
3. Other (SPECIFY)
4. Don't know
5. Refused

ASK IF PAID FOR BY SOMEONE ELSE (IF D19=2). OTHERS GO TO D21

D20. **And, who pays for the assessment?** MULTI-CODE. DO NOT PROMPT/READ OUT

1. Energy company
2. Local Authority
3. Housing Estate
4. Landlord
5. Estate agency
6. Other (Specify)
7. Don't know
8. Refused

ASK IF CHARGING A FEE (IF D18=1) OR SOMETIMES CHARGE A FEE (IF D18=3). OTHERS GO TO D24

D21. (ADD IF D18=3: **When you do charge,)** **How much do you charge for energy assessments?** PROMPT WITH RANGES IF NECESSARY. SINGLE CODE ONLY.

1. £0-49
2. £50-99
3. £100-149
4. £150-199
5. £200-249
6. £250-299
7. £300-349
8. £350-399
9. £400+
10. Don't know
11. Refused
12. Not applicable

D22. **Is the fee ever reimbursed?**

1. Yes
2. No
3. Don't know

ASK IF EVER REIMBURSED (IF D22=1). OTHERS GO TO D24

D23. **In what instances is the fee reimbursed?** DO NOT READ OUT. MULTI-CODE 1-2.

1. Customer goes ahead with an installation
2. Others (SPECIFY)
3. Don't know

ASK ALL

D24. (ADD IF INSTALLER: **I would now like to ask some questions about the fees you charge.**) **In light of the Green Deal being introduced, have your fees increased, decreased or stayed about the same?** SINGLE CODE ONLY.

1. Increased
2. Decreased
3. Stayed the same
4. Don't know
5. Refused

ASK IF D24=1-2. OTHERS GO TO FILTER BEFORE E3

D25. **Why have they** [INCREASED OR DECREASED from D24]? WRITE IN

Don't know	X
Refused	Y

Section E: Experiences of Green Deal processes: certification and compliance

NB: NO E1-E2

ASK IF HAVE EXPERIENCE OF GD (A6/1-2 OR A9/1-3). OTHERS GO TO FILTER BEFORE E7

E3. **I would now like to ask you about your experience of the Green Deal Certification processes.**

Overall, thinking about the process of becoming a Green Deal (IF TYPE 1 AND B1=1 OR B1A/2: **Advisor**; IF TYPE 1 AND B1>1 OR B1A/1: **Assessor Organisation**; IF TYPE 2: **installer**), **how would you rate your experience?** READ OUT. SINGLE CODE

1. **Very good**
2. **Good**
3. **Neither good nor poor**
4. **Poor**
5. **Very poor**
6. Don't know

ASK IF E3=4-5. OTHERS GO TO FILTER BEFORE E5

E4. **Why do you say the process was poor?** DO NOT READ OUT. MULTICODE.

1. My Certification Body didn't keep me informed of progress
2. There was insufficient guidance / information
3. I found the application process too complicated
4. Other (SPECIFY)
5. Don't know
6. Refused

ASK IF TRIED TO REGISTER WITHOUT BECOMING CERTIFIED (A9 '1-3'). OTHERS GO TO E7

E5. **Why did you choose not to go ahead with Green Deal certification?** DO NOT READ OUT.
MULTI-CODE 1-11.

1. Inadequate information provided by the Certification Body
2. Too costly to apply
3. Too long / time consuming to apply
4. (INSTALLERS ONLY) Unable to get PAS 2030 certification
5. (ASSESSORS ONLY) Unable to satisfy certification standards
6. Additional training was required
7. Demand for Green Deal was low
8. Costs of maintaining Green Deal certification
9. Increased responsibility of complying with Green Deal standards
10. Already had another certification
11. Other (SPECIFY)
12. Don't know
13. Refused

E6. **What do you believe would be the annual costs of maintaining the Green Deal certification?**
WRITE IN

--

Don't know	X
Refused	Y

ASK ALL AWARE OF GREEN DEAL (A2 '1'). OTHERS GO TO FILTER BEFORE E9

E7. **Are you aware of the Green Deal Quality Mark?**

1. Yes
2. No
3. Don't know

ASK IF E7=1. OTHERS GO TO FILTER BEFORE E9

E8. I am now going to read out a few statements about the potential benefits of the Green Deal Quality Mark. For each item, please say whether you agree or disagree with it. WHERE AGREE/DISAGREE PROBE WHETHER STRONGLY/TEND TO READ OUT EACH STATEMENT. ONE CODE PER STATEMENT. ROTATE STATEMENTS.

	Strongly disagree	Tend to disagree	Neither agree nor disagree	Tend to agree	Strongly agree	DO NOT READ OUT: Don't know
It would improve your firm's reputation as an (TYPE 1: Assessor; TYPE 2: Installer)	1	2	3	4	5	X
It would offer reassurances to customers	1	2	3	4	5	X
It would help you to secure non-Green Deal work	1	2	3	4	5	X

ASK INSTALLERS IF A11=1. OTHERS GO TO FILTER BEFORE F1

E9. You said you are certified, or in the process of applying to be certified, to PAS 2030. Do you think this standard is fit for purpose?

1. Yes
2. No
3. Don't know

ASK IF E9=2. OTHERS GO TO F1

E11. Why don't you think the PAS 2030 standard is fit for purpose? WRITE IN

Don't know X
 Refused Y

Section F: Intentions of becoming a GD Provider

ASK ALL INSTALLERS WHO HAVE HEARD OF GD, OTHERS GO TO G1

- F1. **Has your business considered becoming a Green Deal Provider?** SINGLE CODE ONLY.
INTERVIEWER PROMPT IF NECESSARY: **A provider is a certified Green Deal supplier that can provide finance to customers.**

1. Yes
2. No
3. May consider in the future
4. Don't know

ASK IF HAS CONSIDERED BECOMING A GD PROVIDER (F1=1). OTHERS GO TO F3.

- F2. **Why have you not yet become a Green Deal Provider?** WRITE IN

1. Don't know
2. Refused

ASK IF HAS NOT CONSIDERED BECOMING A GD PROVIDER (F1=2-3). OTHERS GO TO G1

- F3. **What would make your business seriously consider becoming a Green Deal Provider?**
WRITE IN

1. Nothing
2. Don't know
3. Refused

Section G: Other DECC policies

ASK ALL

- G1. **The next few questions are about other DECC policies. Are you aware of these other DECC policies?** READ OUT.

	Yes	No	Don't know
a) Feed-in Tariff (FiT)	1	2	X
b) Renewable Heat Incentive (RHI)	1	2	X

ASK ALL ASSESSORS. INSTALLERS GO TO G3

- G2. **Would you say that you have enough knowledge about renewable heat technologies, such as heat pumps, to recommend these technologies to customers?**

1. Yes
2. No
3. Don't know

ASK IF AWARE OF RHI POLICY (G1b=1). OTHERS GO TO G6

- G3. **Are you planning to integrate the RHI into your service offer?**

1. Yes
2. No
3. Don't know

G4 DELETED

ASK IF AWARE OF RHI (G1b=1). OTHERS GO TO G6.

- G5. **Are you integrating the RHI into your service offer in any of these ways?** READ OUT.
MULTICODE OK 1-5.

1. **GD marketing/promotion**
2. **Other marketing/promotion**
3. **Advice on energy efficiency**
4. **When giving sales advice**
5. **Other ways (SPECIFY)**
6. Not integrating RHI into service offer
7. Don't know
8. Refused

ASK INSTALLERS ONLY IF THE B8 RESPONSE DID NOT INCLUDE ANY 8-11 (SOLAR THERMAL, AIR SOURCE HEAT PUMPS, GROUND SOURCE HEAT PUMPS BIOMASS BOLIERS) or 13 (ALL MEASURES). OTHERS GO TO H1

G6. **You said you don't install** [INSERT ONE OF THE ABOVE TECHNOLOGIES AT RANDOM, B8 (8-11)], **Can you tell me which of the following are reasons for this?** MULTICODE 1-14. RANDOMISE 1-13. READ OUT.

1. **Don't know enough about it**
2. **Not competent to design it**
3. **Not competent to install it**
4. **Don't have the qualifications to demonstrate competence**
5. **Not MCS certified to install that technology**
6. **Lack of confidence with that technology**
7. **Lack of access to the technology/product**
8. **Lack of experience installing it**
9. **Sufficient business installing other systems**
10. **RHI tariff is not high enough**
11. **Not interested**
12. **Too much hassle to diversify**
13. **Not enough customer demand**
14. **Too expensive to enter the market**
15. **Other (SPECIFY)**
16. Don't know
17. Refused

ASK IF PROVIDE MORE THAN ONE RESPONSE TO G6. OTHERS GO TO H1

G7. **What is the most important reason for not installing** [INSERT SAME TECHNOLOGY B8 (8-11) AS INCLUDED IN G6]?

1. Don't know enough about it
2. Not competent to design it
3. Not competent to install it
4. Don't have the qualifications to demonstrate competence
5. Not MCS certified to install that technology
6. Lack of confidence with that technology
7. Lack of access to the technology/product
8. Lack of experience installing it
9. Sufficient business installing other systems
10. RHI tariff is not high enough
11. Not interested
12. Too much hassle to diversify
13. Not enough customer demand
18. **Too expensive to enter the market**
14. (Other from G6)
15. Don't know
16. Refused

Section H: Follow-up interviews

ASK ALL

H1. **Thank you for participating in this survey. Your participation in this research is extremely valuable and helps to ensure that the programmes are able to meet your needs. Would you be willing to be contacted again in the future?** SINGLE CODE ONLY

1. Yes
2. No
3. Maybe

ASK MCS/EPC SAMPLE SOURCE ONLY (TYPES 1-2). OTHERS GO TO H3

H2. **It is sometimes possible by using unique certification numbers to link the data we have collected today with other Government surveys or datasets held by the government for the purposes of statistical analysis. Would you be happy for your responses to be passed to DECC for this purpose?**

IF NECESSARY: Your confidentiality will be maintained, and linked data will only be used for statistical purposes by researchers authorised by, and analysts working for, DECC.

1. Yes - willing
2. No – unwilling

ASK ALL

H3. **Finally, this has been the pilot stage of a larger study. Do you have any comments or views on the survey, e.g. whether the questions and terminology were clear, and how the survey could be improved generally?** WRITE IN

It could not be improved X
Can't think of anything Y

CLOSE

This survey has been commissioned by the Department for Energy and Climate Change. On behalf of them and BMG Research, thank you very much for your time. The results of the survey will be published in 2014.

2. EWI and HTT CWI installer topic guide

Introduction (2-3 minutes)

Thank interviewee for their time

Introduce self and BMG Research, as an independent research company.

Explain purpose of the research: we are carrying out an evaluation of the Green Deal (GD) and ECO programme on behalf of the Department for Energy and Climate Change (DECC). We are in the process of speaking to 30 businesses that could have participated in the GD supply chain as GD Advisors, Assessors, Providers or Installers, but have chosen not to.

Confirm that the business is not currently certified to deliver GD services as a GD Advisor, Assessor Organisation, Provider, and/or Installer. If currently certified as any of these, thank and close.

Also confirm that the business installs External Wall Insulation (EWI) and/or Hard-to-Treat Cavity Wall Insulation (HTT CWI). If they install neither, thank and close.

Explain that this is an independent evaluation, and thus that the interviewee should feel free to be honest.

Explain the purpose of audio recording, which is to ensure an accurate transcript of discussions.

Reassure interviewee that the discussion and the audio recording will be treated in confidence. Audio recordings and any written transcripts of interviews will be stored securely, and will only be accessible to staff from ICF GHK and BMG Research who are working on this piece of research.

Provide the interviewee with an opportunity to opt out of the audio recording, in which case notes will be written up and sent to the interviewee for validation

The Department for Energy and Climate Change will not have access to audio recordings of interviews, or to any written material where it is possible to identify interviewees.

The results of these interviews will be analysed and presented in aggregated and anonymised form, in a way that ensures that it is not possible to identify any single interviewee/ company.

Explain that the interview should last for no more than 30 minutes.

Any questions?

Business background (5-10 minutes)

- Can you briefly describe the origins and operations of your company? Probe:
 - When was the company established? **[If 2011 or later]** What prompted you to enter this market?
 - What are its main business activities?
 - Would you say that your company currently specialises in any particular type(s) of energy efficiency measure? If so what? *Probe: if they do have a specialism, ask approximately what proportion of their installations consist of this measure. Also probe whether install External Wall Insulation (EWI) and/or Hard-to-Treat Cavity Wall Insulation (HTT CWI)*
 - Where within the country are you active (e.g. nationwide, regional, local etc.)? *Probe: regions covered*
- How many people, approximately, including yourself are employed by your business in Great Britain? *Prompt: Include partners, co-owners, full-time and part-time staff, but exclude sub-contractors. If not known exactly, which of the following categories would you estimate:*
 - 0-9 people
 - 10-49 people
 - 50-249 people
 - 250+ people
- Do you use sub-contractors? *If so, probe for how many businesses/ individuals, and what do they deliver for you? Why do you not have these functions in-house?*
- Was your company involved in the delivery of the CERT and/or CESP initiatives?
- Has your company been involved (or plans to be involved – clarify which) in the delivery of any other government-backed or led energy efficiency initiatives? *Probe: Feed-in Tariffs (FiTs), Renewable Heat Incentive (RHI), other? If yes, in what capacity?*
- Do you work for any larger companies, undertaking installations for them? *Probe: Landlords, Social housing, local authorities, energy companies, GD Providers? Any others?*
 - **[If they say social housing/local authorities]** What proportion of your company's installations are for social housing?
- Before this interview, had you heard of the Energy Company Obligation also known as ECO? **If no, go to Section 3.**
- **If yes**, how did you first become aware of ECO? *Probe: via customers, industry contacts, trade associations, advertising, etc. Approximately when would this have been (month/ year)?*
 - Please explain in your own words what you understand about ECO and how it works? *Probe: whether they have enough information to develop a business model under ECO; whether a lack of understanding has been a barrier to entry*
 - What aspects of the ECO are less clear?
 - Do you have concerns about the ECO? If so, what?
- Does your company undertake installations that fall under the Energy Company Obligation/ECO?
 - If **no**, why have you not delivered measures under ECO? Are you interested in working with energy companies to deliver ECO? Have you tried to enter the ECO market? *Also probe potential issues:*
 - *whether the measures that they deliver are covered by ECO – if not, which measures?;*
 - *pricing issues – are their prices are too high?;*
 - *nothing being delivered in their geographical area – how have they looked?;*
 - *whether they cannot find a company with access to ECO resources from an energy company – how have they tried to identify these companies?;*
 - *don't have the skills – if not, what skills and are different skills required for ECO?;*
 - *can't make a profit – if not, why not?;*

- *already have sufficient work*
- **[If relevant, based on response to previous question]** Would you consider delivering installations under ECO in the future?
 - If yes, under what conditions?
 - If no, why not? *Probe: installation prices available under ECO; paperwork/ compliance associated with ECO work (and how this compares to non-ECO)*
- **If yes:**
 - What do you think will happen to demand for ECO over the next 6 months? Why? Do you plan to continuing working in this area? If not, why not?
 - What Obligations have you been delivering under? *Probe: Carbon Emissions Reduction Obligation (CERO), Carbon Saving Community Obligation (CSCO) and/or Home Heating Cost Reduction Obligation (HHCRO)*
 - What was the contracting arrangement? *Probe: whether they had a contract with an energy supplier; whether they had a contract with another party (in which case who were they and how had they obtained a contract with an energy supplier); whether these contracts were commissioned via the ECO Brokerage platform or via bilateral contracts (i.e. between an energy supplier and a delivery party)*
 - Do your prices or costs for ECO installations differ to other standard installations of the same measures? If yes, why?
 - Have you had to undertake training or other requirements in order to install ECO for these energy suppliers or other organisations (e.g. GD Providers, local authorities, housing authorities)? What type of training? Do these organisations have any method for assessing the quality of your work? If so, what?
 - Are you aware of the proposed changes to the ECO programme? *Prompt if necessary: a reduction in the scale of SWI under the CERO Obligations; quotas for SWI installations. If yes, have you experienced any changes as a result of these changes to ECO? Probe changes to their business or their relationships with energy suppliers. Do you have any concerns that you are not protected from any changes to ECO?*

EWI and/or HTT CWI installation activities (5-10 minutes)

(We are now going to ask you more details about the EWI and HTT CWI market, [not just about ECO installations])

- How many EWI and/or HTT CWI installations has your business carried out in the last 12 months (i.e. number of properties)?
 - To your knowledge, were any of these funded by ECO? If so roughly what proportion?
- For which types of building do you carry out EWI installations? *Probe for whether this is domestic / non-domestic – and type of properties (i.e. social housing, tower blocks, urban or rural, etc.)*
- What certification schemes (for EWI/ HTT CWI) are you currently using or applying to use? *Probe:*
 - Certification to PAS 2030? Do you think the PAS 2030 standard is fit for purpose? *Probe why/ why not?* Do you think PAS 2030 raises the quality of installations across the market? *Probe why/why not?*
 - Other certification schemes? *Probe: which ones, and how do they compare to PAS 2030?*
- What are your views on current levels of demand for EWI/ HTT CWI installations?
 - Is demand for EWI / HTT CWI installations increasing or decreasing over time? What do you think will happen in the next 6 months?
 - What is driving these increases / decreases in demand? *Probe: increased awareness, increasing energy bills, introduction of GD / ECO, recession*
 - Has the introduction of the GD had any effect on the wider market for EWI / HTT CWI installations? If so, what? *Probe: increasing consumer awareness, improving standards, driving innovation. And what about the introduction of ECO? Probe effects of ECO*
 - **[If aware of the proposed changes to ECO]** What impact, if any, do you think that the proposed changes to ECO this will have on overall demand for EWI installations?
 - Is there sufficient capacity within your business to meet current demand for EWI / HTT CWI installations? And do you think there is sufficient capacity within the wider industry to meet demand? *Probe: over / under capacity and current / expected impacts*
 - How do you generate leads for EWI / HTT CWI installations? *Probe: enquiries from the public, door to door sales, telesales, print marketing, TV advertising, through lead generation companies, local authorities, energy companies, registered social landlords, energy assessors, other installers*
 - Do you target specific types of customers or properties? *Please explain what and why?*
- Has the introduction of the GD and ECO had any effect on the way you operate your EWI / HTT CWI business? If so, what changes have you made to your business practices since the introduction of the Green Deal in January 2013? *Probe: identifying customers / generating work, refocus resources, pricing, service offer*

Awareness of GD and Your interest in becoming a certified GD Installer (10-15 minutes)

- And, before this interview, had you ever heard of the Green Deal (GD)?
 - If yes, how did you first become aware of GD? *Probe: via customers, industry contacts, trade associations, advertising, etc.* Approximately when would this have been (month/ year)?
 - Please explain in your own words what you understand the Green Deal to be? *Probe: whether they have enough information to develop services under GD; whether a lack of understanding has been a barrier to entry*
 - What aspects of the Green Deal are less clear?
- Have you considered becoming a certified GD Installer?
 - **If no**, why have you not considered becoming a certified GD Installer? *Probe (in depth):*
 - *Any concerns about Green Deal;*
 - *Any other barriers to becoming certified;*
 - What do you perceive the costs of GD certification to be (in terms of financial cost and time)? And to what extent has this been a barrier to becoming certified?
 - What, if anything, might help you to consider becoming a GD Installer? Would it be useful to receive more information or support? If so, what type of information or support would you find useful? What sources of information would you trust most?
 - **If yes**, why have you considered becoming a certified GD Installer? What, if anything, have you done in response?
 - Have you ever applied to be certified as a GD installer? *If no*, why have you not applied to be certified as a GD Installer? What, if anything, might help you to consider becoming a GD Installer? *If yes*, probe:
 - What stage did you reach? Did you complete the process? If not why not? If yes, for how long were you certified, did you actively deliver GD services, did you deliver ECO services, and why are you no longer certified as a GD Installer?
 - Elapsed time and costs incurred by your business (staff time required, training needed, fees and other charges etc.)? Did you experience any delays, and if so what happened?
 - Do you think you had a good understanding of what was required of you? Did you access any advice/ support from the GD Oversight and Registration Body (ORB)? Did you access any other forms of advice/ support? If so how useful was this?
 - How satisfied were you with your experience of the GD Installer certification process? Why were you satisfied / dissatisfied?
 - How satisfied were you with the support provided by your Certification Body through the certification process? If dissatisfied, why do you say that?
 - Could the certification process be improved? If so how?
- What do you think are the **disadvantages** of becoming a certified GD Installer? *Probe: too much work or time to become certified, costs of gaining and maintaining certification; training costs; low demand for GD; market is too competitive; uncertainty associated with the policy; too complicated to become certified; need more information / don't know enough; satisfied with existing work. If mention costs, ask what they believe the annual costs of maintaining GD certification to be?*
- What do you think are the **advantages** of becoming a certified GD Installer?
 - Do you feel you have missed out on any work because you are not GD authorised? If yes, in what ways, and why is this?
 - **[For those know about ECO]** Do you feel you've missed out on any ECO work because you were not GD certified?

- Would you be more or less likely to become a GD Installer if the certification standard, PAS 2030 covered all installation work you undertook? *Prompt if necessary: i.e. If PAS 2030 covered non-Green Deal work.*
- Is there any pressure from those companies you are contracted with to become GD certified?

Brokering / recommending / offering finance (5 minutes)

- Do you hold a Consumer Credit Act licence?
- Do you currently provide loans to consumers to help them finance installations? If no, do you help consumers find finance or credit to fund their installations?
 - If **no**, why not? *Probe: whether they have sufficient skills/ capacity; whether they can access credit for on-lending?*
 - Would you ever consider providing finance? In what circumstances? Why or why not?
 - Do you think there is a market for loans to help consumers pay the up-front costs of SWI or HTTCWI? Why or why not?
 - *Then move to Section 6*
 - If **yes to either providing loans directly or helping broker credit/finance**, probe:
 - The brand name used for this loan / or the types of credit brokered/recommended (e.g. personal loan)
 - What the loan can be used for. Can they be used to fund energy efficiency installations?
 - How are these loans disbursed? Whether you are a broker for another company's loans, or whether this is your own capital?
 - How long is the loan typically for? Is the debt attached to the individual? Or to a mortgage?
 - Whether loans are secured, and if so what they are secured against?
 - What is the min/ max size of these loans? What are the min/max terms?
 - What are the typical interest rates (APR) and charges? Do these vary between customers?
 - What credit checks do you apply? What proportion of people fail these credit checks?
 - Is there any kind of warranty attached to the loan?
 - What is the default rate with your loans?
 - How long have you been offering this type of loan?
 - **[If brokering]**, do you offer different loans to different customers? Based on what? (e.g. credit rating, measures involved, etc.)
 - Are you aware that consumers can get a loan to finance installations under the Green Deal? *Prompt: as made available by the Green Deal Finance Company (GDFC)*
 - Do you think this could increase the demand for SWI / HTTCWI? Why/why not?
 - **[If aware of GDFC finance]** How does your finance compare to the GDFC's finance (e.g. APR, coverage, terms etc.). Does the GDFC's finance seem like an attractive offer to consumers?

Closing

Thank interviewee again for their time.

- Is there anything else you would like to discuss about GD, ECO or the wider market for EWI/ HTTCWI?
- Do you have any other comments on GD and ECO that you would like us to feed back to DECC.

Explain that there may be further research with GD suppliers and with suppliers that have chosen not to participate in GD and ask if the interviewee would be willing to be contacted again.

Explain that DECC will publish the first report on the GD and ECO evaluation in due course.

For those interested in ECO, also mention that DECC intends to publish its consultation on ECO in the near future.

3. EWI and HTT CWI installer topic guide

Introduction (2-3 minutes)

Thank interviewee for their time

Introduce self and ICF GHK, as an independent research company.

Explain purpose of the research: we are carrying out an evaluation of the Green Deal (GD) and ECO programme on behalf of the Department for Energy and Climate Change (DECC). We are in the process of speaking to 30 businesses that could have participated in the GD supply chain as GD Advisors, Assessors, Providers or Installers, but have chosen not to.

Confirm that the business is not currently certified to deliver GD services as a GD Advisor, Assessor Organisation, Provider, and/or Installer. If currently certified as any of these, thank and close.

Explain that this is an independent evaluation, and thus that the interviewee should feel free to be honest.

Explain the purpose of audio recording, which is to ensure an accurate transcript of discussions.

Reassure interviewee that the discussion and the audio recording will be treated in confidence. Audio recordings and any written transcripts of interviews will be stored securely, and will only be accessible to staff from ICF GHK who are working on this piece of research, and a contracted third party interview transcription company operating under a confidentiality agreement.

Provide the interviewee with an opportunity to opt out of the audio recording, in which case notes will be written up and sent to the interviewee for validation

The Department for Energy and Climate Change will not have access to audio recordings of interviews, or to any written material where it is possible to identify interviewees.

The results of these interviews will be analysed and presented in aggregated and anonymised form, in a way that ensures that it is not possible to identify any single interviewee/ company.

Explain that the interview should last for no more than 30 minutes.

Any questions?

Business background (5-10 minutes)

- Can you briefly describe the origins and operations of your company? Probe:
 - When was the company established?
 - What are its main business activities (e.g. retail, services, installer of home improvements)?
 - *Probe if have any experience of the market for energy efficiency measures*
 - If they provide installations, would you say that your company currently specialises in any particular type(s) of energy efficiency measure? If so what? *Probe: if they do have a specialism, ask approximately what proportion of their installations consist of this measure*
 - Where within the country are you active (e.g. nationwide, regional, local etc.)?
- How many people, approximately, including yourself are employed by your business in Great Britain? *Prompt: Include partners, co-owners, full-time and part-time staff, but exclude sub-contractors. If not known exactly, which of the following categories would you estimate:*
 - 0-9 people
 - 10-49 people
 - 50-249 people
 - 250+ people
- Do you currently have a Consumer Credit Act (CCA) licence? If yes, is it to provide loans or to broker finance?
- Before this interview, had you heard of the Energy Company Obligation, also known as ECO?
 - **If yes**, how did you first become aware of ECO? *Probe: via customers, industry contacts, trade associations, advertising, etc. Approximately when would this have been (month/year)? Was this in the context of researching a possible bid for contracts from energy co. or third parties?*
 - Please explain in your own words what you understand about ECO and how it works? *Probe: whether they have enough information to develop a business model under ECO; whether a lack of understanding has been a barrier to entry*
 - What aspects of the ECO are less clear?
 - Do you have concerns about the ECO as the basis of a business model? If so, what?
 - **[If an installer of energy efficiency measures]** Does your company undertake installations that fall under the Energy Company Obligation/ECO? **If no**, why not? Have you tried? Would you be interested in doing so in the future? **If yes:**
 - Approximately how many contracts have you had to deliver ECO funded measures? What proportion of your work is from ECO installations? What do you think demand will be over the next six months?
 - Did you find it difficult to access the ECO market? If yes, how so? How did you overcome it? How could it be improved?
 - What Obligations were you delivering under?
 - What was the contracting arrangement? *Probe: whether they had a contract with an energy supplier; whether they had a contract with another party (in which case who were they and how had they obtained a contract with an energy supplier); whether*

these contracts were commissioned via the ECO Brokerage platform or via bilateral contracts (i.e. between an energy supplier and a delivery party)

Did you have to undertake training or other requirements in order to install ECO under these contractors? What type of training? Is there any method for assessing quality of work?

- Before this interview, had you ever heard of the Green Deal?
 - **If yes**, how did you first become aware of GD? *Probe: via customers, industry contacts, trade associations, advertising, etc.* Approximately when would this have been (month/year)? Was this in the context of researching a possible service offer under GD?
 - Please explain in your own words what you understand the Green Deal to be? *Probe: whether they have enough information to develop services under GD; whether a lack of understanding has been a barrier to entry*
 - What aspects of the Green Deal are less clear?
 - Do you have concerns about the Green Deal? If so, what?
 - Why have you not considered participating to date?
- **[If an installer of energy efficiency measures]** Was your company involved in the delivery of the CERT and/or CESP initiatives? Has your company been involved (or plans to be involved – clarify which) in the delivery of any other government-backed or led energy efficiency initiatives? *Probe: Feed-in Tariffs (FITs), Renewable Heat Incentive (RHI), other? If yes, in what capacity?*
- **[Ask ALL]** What are your views on the market for energy efficiency products (e.g. boilers, loft/wall insulation, etc.)? *Probe:*
 - Do you think demand is increasing or decreasing over time? What do you think will happen in the next 6 months? And what do you think will happen over the next few years?
 - What is driving these increases / decreases in demand? *Probe: increased awareness, increasing energy bills, introduction of GD / ECO, recession*
 - **[If aware of GD or ECO]** Do you think the introduction of the GD had any effect on the overall market for energy efficiency measures? If so, what? *Probe: increasing consumer awareness, improving standards, increasing protection for consumers, driving innovation.* And what about the introduction of ECO? *Probe effects of ECO*

Finance background (5-10 minutes)

- Do you currently provide loans to consumers to help them finance improvements to their homes? Does this include energy efficiency measures, for example, boilers or wall insulation? If yes, do you lend your own capital ('on balance sheet') and/ or do you use special purpose vehicles to lend from other sources, and reduce liabilities ('off balance sheet')? Do you use a brand name under which lending is made?
- Do you help consumers find finance or credit to fund these improvements (e.g. broker finance)? If so, what types of loans are made (e.g. personal loans)
 - If **no to either providing loans directly or helping broker credit/finance**, why not?
Probe: whether they have sufficient skills/ capacity; whether they can access credit for on-lending?
 - Would you ever consider it? In what circumstances? Why or why not? Check they are not leasing home improvements?
 - Do you think there is a market for loans to help consumers pay the up-front costs of installing energy efficiency measures, like wall insulation or boilers? Why or why not?
 - Then move to **Section 5**
 - If **yes to either providing loans directly or helping broker credit/finance**, probe (noting that the questions will differ slightly depending on whether the respondent is providing or brokering finance):
 - Do you, or have you considered, leasing the home improvement measures, give examples?
 - What the loans can be used for. Can they be used to fund energy efficiency installations?
 - What is the min/ max size of these loans?
 - How long is the loan typically for?
 - Are loans usually unsecured; if secured loans, what are they typically secured against?
 - Is there usually any kind of warranty attached to the loan?
 - What are the min/max terms?
 - Do you offer / broker different terms for different customers? Based on what? (e.g. credit rating, measures involved, etc.)
 - What are the typical interest rates (APR) and charges? Do these vary between customers?
 - What credit checks do you apply? What proportion of people fail these credit checks?
 - What is the default rate with these loans?
 - How long have you been offering/ brokering this type of loan?
 - Have you ever offered a financial package in response to a GD Assessment? *If yes, probe:*
 - *Approximately how many?*
 - *Please describe the process through which these financial packages have been developed (i.e. who within your organisation is responsible; do you have a specific 'sales force'; where and when does the costing process take place; do you use*

any software to assist you in the costing process? If yes, what? Clarify: Stroma, eTech, or another)

- *Do you work with/ have relationships with GD Advisors and Assessor Organisations as a result of offering financial packages in response to GD assessments*

Your interest in becoming a GD Provider (10-15 minutes)

- Are you aware that consumers can get a loan to finance installations under the Green Deal?
Prompt: as made available by the Green Deal Finance Company (GDFC)
- Do you think this could increase the demand for energy efficiency measures? Why/why not?
- **[If aware of GDFC finance]** How does your finance compare to the GDFC's finance (e.g. APR, coverage, terms etc.). Does the GDFC's finance seem like an attractive offer to consumers?
- Are you aware of GD Providers and their role in delivering loans to finance improvements to the energy efficiency of consumers' homes?
 - **If not aware:**
 - Would you be interested in gaining access to other lines of credit for your energy efficiency loans? **If no**, why not?
 - **[Confirm]** Would you consider becoming a GD Provider?
 - If not aware of GD Providers and not interested in gaining access to credit, and would not consider becoming a GD Provider *then move to **Section 5***
 - **If aware:** explain in your own words the role of GD Providers? From where have you obtained your information about GD Providers? What aspects of the role of GD Providers are less clear?
 - **[for those already providing loans]** Would you be interested in potentially offering Green Deal Finance to consumers? Why/why not? Could this fit into your current business model? If so, how?
 - **[for those helping to broker finance]** Would you be interested in potentially providing Green Deal Finance as one of the options you broker for your customers? Why/why not? Could this fit into your current business model? If so, how?
 - **[Confirm]** Would you consider becoming a GD Provider?
- **If no, probe:**
 - Why have you decided not to consider becoming a GD Provider?
 - Did you establish that there was not a viable business model that could take advantage of the programme?
 - What do you think are the **disadvantages** of becoming a GD Provider? **Probe in depth:**
 - barriers to entry (e.g. registration with ORB; onboarding with the Green Deal Finance Company - GDFC);
 - risks associated with the GD provider model (e.g. liabilities when making a GD Plan);
 - costs associated with registration – [If mention costs, ask what they believe the annual costs of maintaining GD certification to be?];
 - any other disadvantages.
 - What could be done to overcome these issues, mitigate these risks and make it more attractive to become a GD Provider?
 - What do you think are the **advantages** of becoming a GD Provider? *Probe: new business opportunities; opportunity to secure work with energy companies through ECO Brokerage; opportunity to enter a new sector, raise profile, reputational benefits* [**Probe in depth**]

- If mention ECO brokerage, probe their level of interest in using the ECO brokerage and whether they see this as the main advantage of becoming a GD Provider.
- Would it be useful to receive more information or support on becoming a GD Provider? If so, what type of information or support would you find useful? From what sources?
- What, if anything, might help you to consider becoming a Green Deal Provider?
 - *Then move to **Section 5***
- **If yes, probe:**
 - Why have you considered becoming a GD Provider? What made you consider it in the first place?
 - Have you established how it would fit into your current business model? If so, how?
 - Have you established how you could generate sufficient revenues to make it viable? If so, how?
 - What do you think are the **advantages** of becoming a GD Provider? *Probe: new business opportunities; opportunity to secure work with energy companies through ECO Brokerage; opportunity to enter a new sector, raise profile, reputational benefits [**Probe in depth**]*
 - If mention ECO brokerage, probe their level of interest in using the ECO brokerage and the extent to which this influenced their likelihood of becoming a GD Provider?
 - What do you think are the **disadvantages** of becoming a GD Provider? *Probe: barriers to entry (e.g. registration with ORB; onboarding with the GDFC); risks associated with the GD provider model (e.g. liabilities when making a GD Plan); costs associated with registration [**Probe in depth**]*
 - Have you ever applied to register as a GD Provider with ORB?
 - If **no**, why have you not applied to register as a GD Provider? *Probe: was it because of the registration or certification processes/ costs, the GD and GD Provider model, the ability to generate sufficient revenues, or something else? [**Probe in depth**]*
 - If **yes**, probe:
 - What stage did you reach? Did you complete the pre-assessment questionnaire, did you also complete the Fitness Test, did you achieve GD certification?
 - Can you explain why you decided to drop out? *Probe: was it because of the registration or certification processes/ costs, the GD and GD Provider model, the ability to generate sufficient revenues, or something else? [**Probe in depth**]*
 - Elapsed time and costs incurred by your business (staff time required, training needed, fees and other charges etc.)? Did you experience any delays, and if so what happened?
 - Your understanding of what was required of you. Did you access any advice/ support from the GD Oversight and Registration Body (ORB)? Did you access any other forms of advice/ support? If so how useful was this? Were your expectations met? Why/why not?
 - Did you decide at any point that you no longer wanted to offer finance? Why?
 - How satisfied were you with your experience of the GD Provider registration process? Why were you satisfied / dissatisfied?
 - Could the registration process be improved? If so how?

- Did you hear the announcements related to the GD and ECO that were made by the Chancellor in the autumn statement? If **yes**, have the announcements made you any more or less likely to become a GD Provider? Why?

Closing

Thank interviewee again for their time.

- Is there anything else you would like to discuss about GD, ECO or becoming a GD Provider?
- Do you have any other comments on GD and ECO that you would like us to feed back to DECC.

Explain that there may be further research with GD suppliers and with suppliers that have chosen not to participate in GD and ask if the interviewee would be willing to be contacted again.

Explain that DECC will publish the first report on the GD and ECO evaluation in due course.

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