ESOS Compliance:
A Roadmap for UK Organisations

For UK organisations that qualify for the Energy Savings Opportunity Scheme (ESOS), preparing for ESOS is no longer a simple compliance task. Bing's search data shows rising interest in "ESOS audits", "how to prepare for ESOS", and "ESOS Phase 4 requirements", reflecting the growing complexity of the scheme and the increased scrutiny from the Environment Agency.

This guide explains how to prepare for ESOS, what information you need, and how to ensure your organisation maximise the value of the process.

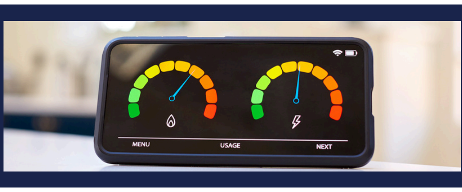
WHAT IS AN ESOS AUDIT?

An ESOS audit is an energy assessment required under UK law for large organisations. It evaluates energy consumption across:

- Buildings
- Industrial processes
- Transport

The purpose is to identify cost-effective energy-saving opportunities and support long-term energy reduction.

Your **8 Step Guide** to Compliance



1 Confirm Whether You Qualify

- 250+ employees, or
- Annual turnover above £44 million & balance sheet above £38 million, or
- Part of a corporate group that qualifies

2 Appoint an ESOS Lead Assessor Early

Look for assessors with sector experience, transparent pricing, and strong reporting standards.

3 Gather & Validate Energy Data

Assessor will collect data for:

- Electricity, gas, and heating fuels
- Fleet fuel and business mileage
- Industrial equipment and processes

Your data must:

- Cover a continuous 12-month period
- Represent at least 95% of total energy consumption
- Be broken down by building, type and vehicle size if available
- Be accurate, complete, and traceable

4 Define Audit Scope & Sampling Strategy

Your Lead Assessor will help determine which sites and processes will be audited.

- Sample Approach for Multi-Site Organisations
- Construction Site Specialists
- Ensure 95% of Estate is Audited (on site/ transport and desk based)
- Access to sites critical
- Chaperone with knowedge of the site welcomed

5 Prepare for Site Visits

Site visits are essential for verifying how energy is used in practice.
Prepare by:

- Identifying site contacts who are knowledgeable about the site
- Ensuring access to equipment and plant rooms
- Providing manuals and schematic drawings if available
- Briefing teams on the audit purpose

Early auditing can help to identify energy savings in advance of the deadline, highlighting opportunities with immediate savings.

6 Build a Complete Evidence Pack

- Qualification assessment
- Total energy consumption
- Sampling methodology
- Audit methodology
- Recommended opportunities
- Calculations and assumptions
- Identified opportunities
- Lead Assessor & Company Director sign-off

7 Review & Approve Recommendations

Review recommendations for:

- Future feasibility & optioneering
- CAPEX & OPEX
- Short/medium/long term payback
- Energy impact
- Operational suitability

8 Submit Your ESOS Notification

Once complete, you must submit your compliance notification to the Environment Agency. Failure to submit on time can result in financial penalties.

Please note: submission is the responsibility of the company, and not the Lead Assessor.