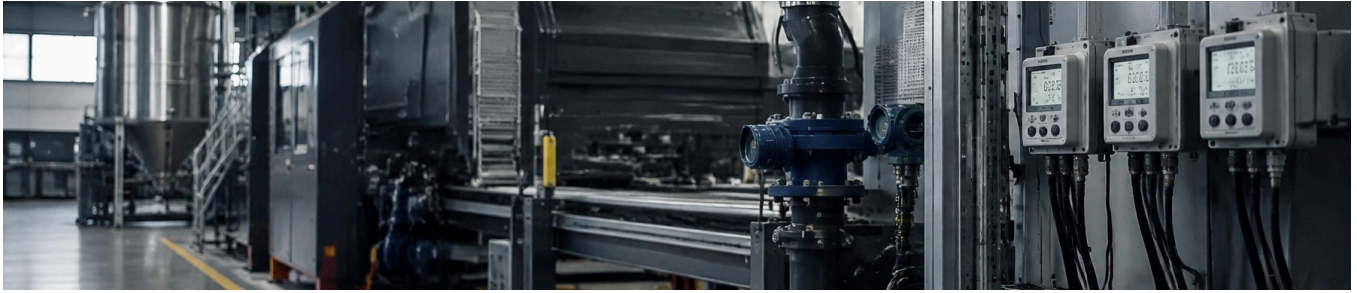


ESOS: Your Compliance Pathway

A plain-English route through the Energy Savings Opportunity Scheme, from qualification to a repeatable cycle.



West Yorkshire Manufacturing Services (WYMS) is a charity built by manufacturers, for manufacturers, supporting the future of manufacturing and engineering through workforce development, industry collaboration and business support. This session was delivered at Junction25 at WYMS, Brighouse.

What ESOS is and why it exists

The Energy Savings Opportunity Scheme (ESOS) is a mandatory UK energy assessment scheme. It requires large organisations, at regular intervals, to assess the energy they use across buildings, industrial processes and transport, identify where it is being wasted, and record what could be done about it. The policy intent is straightforward: organisations that use a lot of energy should understand it well enough to act, and the audit creates the evidence base that makes action possible. ESOS applies to large undertakings as defined in the scheme regulations. Qualification is determined against criteria set out in current official guidance, covering factors such as organisational size and turnover, and group structures can bring multiple UK entities within scope. ESOS Phase 4 qualification applies where the undertaking or any UK group member employs 250 or more people, or has annual turnover over £44 million and a balance sheet total over £38 million, assessed at the 31 December 2026 qualification date.

The pathway, step by step

1. Determine qualification

Establish whether the organisation, and each entity in a group, meets the qualification criteria as above, assessed on the 31 December 2026 qualification date. Do this early: it sets the timeline for everything that follows.

2. Scope and gather data

Define which sites, buildings, processes and transport activity are in scope, then collect half-hourly electricity data, gas and fuel records, invoices and production data. The Monitoring and Evidence download in this series sets out what to prioritise, and the HH data analyser tool can turn raw half-hourly data into the load-shape evidence the assessment needs.

3. Undertake the assessment

Work with an approved ESOS Lead Assessor to define the assessment scope, agree the evidence base, conduct energy audits across the site list and document findings. A lead assessor reviews and confirms the compliance evidence; the quality of that evidence depends on the data gathered in step 2.

4. Identify compliance routes

Compliance routes are ESOS energy audits and/or certified ISO 50001 energy management systems; Display Energy Certificates and Green Deal Assessments no longer qualify. At least 95% of total energy consumption must be covered.

5. Register and notify

Notifications are submitted through MESOS, the Environment Agency's online system, by 5 December 2027, with the action plan following by 5 December 2028. Keep records of what was submitted and when.

6. Repeat the cycle

ESOS runs in repeating phases. The organisations that gain most treat each phase as a checkpoint, not a one-off: same data reused, same list tracked, and a note of what each recommendation actually delivered. Put the reporting in place now so the next phase looks after itself.

What good evidence looks like

Compliance rests on evidence, and four things make it strong:

- **Baseline data.** A documented energy baseline covering the sites and fuel types in scope, built from metered data rather than estimates where possible, with boundaries and assumptions recorded.
- **Site list.** A current list of the sites, buildings and transport activity included in the assessment, with the reason each is in or out of scope.
- **Assessment records.** The audit outputs: what was examined, what was found and the recommendations that emerged, in a form a third party could follow.
- **Board sign-off.** Evidence that the responsible senior decision-maker reviewed and approved the compliance submission.

From findings to action

An ESOS report that is filed and forgotten produces no savings. The recommendations that survive technical and commercial scrutiny become a pipeline, and the discipline for that is set out in the From Findings to Action download in this series: prioritise on return, ease, dependency and risk; test technical fit and full cost; sequence an investable plan; measure results after delivery. The Project Prioritiser tool ranks opportunities on a consistent basis. Scheme details verified against current official guidance before reliance. This download summarises ESOS at a general level for orientation. Qualification criteria, thresholds, phase dates, compliance routes and notification processes are stated from official government guidance and should be checked against the current published guidance before being relied on. Last verified: 16 October 2026 against GOV.UK ESOS Phase 4 guidance (30 July 2026) and the GOV.UK BICS guidance for applicants.

Next step

ESOS compliance needs a lead assessor on the approved register. Hawley Energy is led by a CIBSE-accredited ESOS Lead Assessor and can support any stage from scoping and data gathering to sign-off and the action plan that follows. Email hello@hawleyenergy.co.uk to check where you stand. www.hawleyenergy.co.uk/wyms | 01484 958761

Scan for the full WYMS resource hub: guides, spreadsheets and templates, no account needed.

www.hawleyenergy.co.uk/wyms



About Hawley Energy

Hawley Energy is an independent energy consultancy based in West Yorkshire. We turn energy compliance pressure into measurable progress: data analytics and reporting (Enerlyse), transparent procurement (Baseline Power), coordinated project delivery and flexible financing (PowerPacks), with one point of contact and complete accountability. Certified to ISO 9001, ISO 14001 and ISO 45001, and led by a CIBSE-accredited ESOS Lead Assessor, we replace guesswork with evidence-driven insight. The cheapest source of capital is the energy you are wasting.

Talk it through: no pressure

Andrew Hawley · hello@hawleyenergy.co.uk · 01484 958761

30-minute call · I love a challenge

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Downloaded from the WYMS session resource hub, 22 October 2026. West Yorkshire Manufacturing Services (WYMS) is a charity built by manufacturers, for manufacturers, supporting the future of manufacturing and engineering through workforce development, industry collaboration and business support. This session was delivered at Junction25 at WYMS, Brighouse.

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