

VIPA International Global Office
142 Avenue Jules Bordet, Brussels 1140
Phone: +32 2 761 1681 Fax: + 32 2 761 16 99
Mail: VIPA-international@kellencompany.com
Web: www.vipa-international.org

VACUUM INSULATION PANEL



GLOBAL ASSOCIATION

Vacuum Insulation Panel Association Board Conference Call Friday, 17 November 2017, 10:00 to 11:30 CET

Participants:

Gregor Erbenich, Porextherm, VIPA International President
Yoash Carmi, VIPA International Vice-President, Avery Dennison Hanita
Roland Caps, va-Q-tec
Uroš Cotelj, Knauf Insulation
Raquel Ponte Costa, VIPA International Executive Director
Francesco Gattiglio, VIPA International Policy Officer

Invitees (from 11:15 to 11:35)

Mathias Kube, Ecofys/Navigant
Sven Schimschar, Ecofys/Navigant
Martijn Overgaag, Ecofys/Navigant

Apologies:

Vladimir Pogač, Turvac, VIPA International Treasurer
Geert Houvenaghel, Microtherm
Miaotian Sun, Qingdao Kerui New Environmental Materials Group
Michel Chauvois, Rexor
Pascal Rousset, Rexor
Reiner Wartusch, Evonik Industries
YanQing Zhou, Hongda Suzhou V.I.P. New Material
Se-Won Yook, AIMT Corporation
Gary Chalkley, Camvac
Richard Burnley, Kingspan
Tony Scott, Kingspan

MINUTES

1. Welcome

1.1 VIPA antitrust compliance statement

Raquel Ponte Costa opened the meeting by welcoming all participants. The participants were reminded of the anti-trust rules that have to be respected.

1.2 Approval of the agenda

The agenda was approved by all participants, without any additions. Raquel explained that the company Ecofys/Navigant was invited to attend the conference call to present itself. They will join from 11:00 onwards.

1.3 Approval of the minutes of the conference call of 19 September 2017

Participants approved the minutes as a correct statement of the decisions and actions agreed on 9 September 2017.

1.4 Review of the action items of the previous meeting

Raquel Ponte Costa reviewed the actions items. The following actions were not complete and will remain in the action list:

Actions:

- Members to provide new case studies for the VIPA website.
- Members to think about strategies to promote VIP and concrete actions VIPA could take on this regard.

- VIPA secretariat to prepare a press release on the energy efficiency package to be published after 28 November.
- VIPA secretariat to ask the CSTB to host a joint Build Up webinar with VIPA on the conclusion of the Annex 65 project.

Francesco explained the press release about the energy efficiency package will go out once the results of the vote takes place. He highlighted that the secretariat already published the 5 press releases foreseen for 2017 for this press release will be charged extra by Kellen. On the Build Up webinar, the secretariat is arranging with the Build Up platform a webinar in early 2018. VIPA and the CSTB should be hosts and the topic will be the publication of the final report of the Annex 65 project. Daniel agreed with this but alerted the final report will only be published early 2018. The webinar shall take place after that.

The remaining actions were completed: Creek sent some questions about standardisation which were passed on to the Technical WG for response. Regarding standardisation, the secretariat sent more details about the meeting in Paris on the board update of 7 November. A section on standardisation is now available on the VIPA website: <http://vipa-international.org/standardization>. Regarding market studies, the secretariat contacted four companies: Lux Research (who was not interested on performing such study), Interconnection Consulting, Ecofys/Navigant and USP.

2 IVIS organisation

2.1 Debrief about the decision of the IVIS Scientific Committee

Raquel Ponte Costa explained that she attended the Scientific Committee meeting together with Gregor Erbenich in Paris. The meeting started well with some members asking for clarification about the ownership of IVIS as well as membership to the Scientific Committee. The moderators of the meeting (Samuel Brunner and Daniel Quénard) preferred to delay this discussion and suggested to put some rules on paper the next months. The three candidates: VIPA, ZAE and Kindai University presented their proposals for IVIS 2019. The biggest weakness of VIPA's proposal was the fact that no concrete location was provided. The members of the Scientific Committee asked if the event was going to take place in Germany or in Munich for instance. They also asked if VIPA would agree to co-organise the event with ZAE or Kindai University. We explained that we tried to do this with the CSTB but it was not possible to share the event costs so we could not work together on IVIS 2017. For this reason Raquel highlighted that VIPA would prefer to organise the event on its own. However for the moment all possibilities are on the table.

Voting took place the following day via secret ballot. The vast majority of the members of the Scientific Committee voted for Japan. VIPA's proposal received only 1 vote. Gregor emphasised his disappointment with this poor result because there are some VIPA members in the Scientific Committee and they did not vote for the association.

2.2 Discussion and vote on the proposals to co-host IVIS2019 with Kindai University

Some participants in the call felt that indeed Japan is a very attractive location and IVIS should rotate continent each edition. As VIPA did not have a concrete location and suggested Europe the chances were very low from the beginning. These members feel that in general the Scientific Committee has nothing against VIPA organising the event. Other members highlighted that the Scientific Committee is dominated by universities and institutes and industry has very few seats so it will be very difficult to convince the Scientific Committee to allow VIPA to organise IVIS.

Raquel mentioned that VIPA is now officially a member of the Scientific Committee so it should receive information about the proposed rules for membership and also for the future organisation of IVIS.

2.3 Strategic discussion on positioning towards IVIS and organisation of IVIS 2021

Raquel explained that the Scientific Committee together with Daniel and Samuel are strongly encouraging VIPA to partner with the Kindai University on IVIS 2019. They offered that VIPA organises one session on non-scientific topics. She asked the participants in the call to share their thoughts about this partnership possibility taking into account that VIPA has no resources in Japan, both in terms of secretariat and of members.

Some members were of the opinion that VIPA should take this opportunity and commit to organise a session with 3-4 presentations given by VIPA board members who will attend the event in any case. Topics could be for instance standardisation or the GSH quality label. This way there are little financial implications for VIPA and we seize the opportunity which was given to us to partner with Kindai University.

Other members disagreed and asked for a more long-term approach to this issue: what does VIPA want to achieve with IVIS? Is IVIS the best platform to promote the VIP industry? IVIS is the only event about the VIP industry but it takes place in a university and it is organised by scientific people which gives the impression that the technology is not mature and is still at an academic stage. However and despite the small size there is an industry out there so why should this event continue in such a university environment, Gregor Erbenich asked the other board members? Gregor pinpointed that the Scientific Committee has very little representation from industry so it will be very difficult for VIPA to get back the organisation of IVIS since the universities and institutes rely on organising the event to secure some funding. Gregor questioned if IVIS is the best platform to promote the VIP industry. In his view, a different approach should be taken and universities should not be in charge of the single event about the VIP industry.

As there was no consensus about this and a lot of Board members were not in attendance, Raquel suggested to park this topic until the next Board conference call of 8 December.

3 VIP market studies

Raquel explained that at the last Board meeting in Paris it was decided to ask quotes to market research companies about a study on the market size of VIPs. No further details were discussed so the secretariat contacted some companies to get more information but some decisions on the scope need to be taken before proceeding with the exercise.

3.1 Scope of the study

Members discussed the different options (and bearing in mind the limited budget of VIPA) agreed on the following:

Objective: to have a more accurate view on the current size of the VIP market in Europe and Asia, to start with. The report will be available ONLY to VIPA members and will be used for membership outreach and eventually at conferences or meetings VIPA might organise with decision-makers

General scope: current market size of VIPs split per application (buildings & construction, appliances, transport & packaging) and per core material (fumed silica and fiberglass). Trends and future market developments are less urgent and could be excluded from the study for the time being mostly since it will decrease the cost.

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Geographic scope: European Union + Turkey; China; Japan; South Korea so one figure for EU + Turkey, one figure for China, one figure for Japan and one for Korea

Methodology: commitment of VIPA members to provide all data and be available for interviews and exchanges with the selected company (via NDA agreement). VIPA will also invite companies in our list of prospect members to contribute to the study.

Distribution: the final report will be available only to VIPA members. All rights will belong to VIPA International. VIPA will eventually present a part of the results at events or in meetings with decision-makers as deemed appropriate.

Members agreed that for budget reasons the above mentioned is a good start and that the following year the study can be extended and new features can be added like the North American market and market trends and outlook.

3.2 Discussion with Ecofys

Three representatives from Ecofys/Navigant: Mathias Kube, Sven Schimschar and Martijn Overgaag joined the call at 11:15. They presented themselves and their expertise in market studies. They also went through the proposed methodology for the VIP market study. Ecofys staff and participants in the call went through the list of questions of Ecofys in line with was decided earlier (see agenda item above 3.1). Ecofys promised to send a revised version of the proposal early December.

4 Any other Business

Raquel mentioned she will send a summary of what was discussed about the market study to other members to see if they agree with it. She will also use this more detailed brief to go back to the other companies and ask for a quote so a decision can be taken at the next conference call on 8 December.

No other business was discussed. The conference call meeting finished at 11:45.
