



MARKET STUDY ON VIP PRODUCTS: LIST OF KEY QUESTIONS

FOR DISCUSSION

13. OCTOBER 2017

VACUUM INSULATION PANEL



GLOBAL ASSOCIATION

ECOFYS

A Navigant Company

EXECUTIVE SUMMARY

Thank you very much for reaching out to us and for the first very positive telephone call. We as Ecofys are **highly excited to support you on a** market study for VIP products. Given our broad relevant project experience and expertise we **are very well positioned to do so.**

As agreed in our telephone call we send you a **list of key questions**, e.g. around involvement of your members, data collection and exact scope. Your answers to those questions will help us **tailor the scope and approach optimally to your needs.**

To make sure that you fully understand our questions we include a **draft view on a proposed approach.**

- We foresee to start with aligning on project timeline and methodology with you
- Afterwards we would perform the analysis in steps a – e (as shown on slide 3) for the three main regions Europe, North America and Asia – always covering all three applications appliances, packaging and buildings
- We would end our project with delivering a final report and conducting a discussion with your members.

We propose to have a **telephone call with your board (representatives) to clarify the questions and ensure that we fully understand your needs.**

OUR FIRST THOUGHT ABOUT THE PROJECT APPROACH

1 Project scoping & methodology: Kick-off meeting, project objectives, discuss proposed methodology, align on timeline & key contacts to be involved in the project)

2 Europe
(Appliances, Packaging, Buildings)

3 North America
(Appliances, Packaging, Buildings)

4 Asia
(Appliances, Packaging, Buildings)

- a Quantify theoretical insulation potential** (e.g., mandatory limitations in energy usage expressed in U-values & in consequence as combination of lambda values and thickness for both appliances (“Eco-Design requirements”) and buildings (building code requirements) based on market research and Ecofys expertise – potentially involve selected members in data gathering & validation
- b Qualitative assessment of application of VIP products** (e.g., what is the „competitive positioning“ against other forms of insulation) – potentially involve selected members
- c Quantitative estimation of market potential in €** for each region Europe, Asia and North America (combining first two steps)
- d Conduct interviews with “demand side” parties** (e.g., appliance manufacturers) to test hypotheses on applicability & the draft quantification, **include their feedback & create draft results**
- e Conduct interviews with selected VIPA members to challenge the draft results & finalize results**

5 Develop final report and present results to VIPA

INITIAL KEY QUESTIONS (I/II)

- **Overall approach**

- What is the **motivation** for this study? (e.g., do you want to use it in discussions with new members, policy makers, end-users? To get to an aligned view on market sizes?)
- We propose to **start our analysis (step 2) with Europe** focusing on all three proposed applications. Do you agree to this or would you prefer another sequencing? We may decide on the market-region combination which has the largest value for VIPA in our kick-off meeting.
- We understand that you foresee as **deliverable** an assessment of market potential for VIP products for the main three applications. We understand that you want to focus on Europe, Asia, North America.
 - Could you specify the exact regions / countries you would like us to analyze? (e.g., which countries to be included in "Europe", all EU-28? Which countries would you include in "Asia"?)
 - Does this mean you are looking for one value per region as output? So just the three regions as a "total" or are there core countries that should be covered?
- Are you also interested to assess market drivers and barriers, and develop specific incentives to maximize market pull for VIPA products?

- **Data collection & assessment of application of VIP products:**

- Can we **involve (selected) members** for collecting data on sectors? Any interaction would be under NDA and anonymized prior to use.
- Do you have already identified **market potentials** for some applications? (We would then build on this and expand this based on our project experience and publicly available sources)
- Can we **involve (selected) members** for assessing the applicability & 'competitive positioning' of VIP products?
- Do you or your members have subscriptions to market research services, and could they be shared with us (we know existing market research is not specific enough, but is useful for triangulation purposes)?

- **Interviews with the "demand side" (e.g., manufacturers of appliances):**

- Do you agree that it would be value adding to include such **interviews**?
- Can we use **existing contacts / sales channels** of members to identify interview partners?

INITIAL KEY QUESTIONS (II/II)

- **Final output/deliverable:**
 - We see as **final deliverable** a report in ppt plus an excel with key calculations. Do you agree?
- **Project timing / budget :**
 - Until when do you need the final deliverable? Is there a fixed **deadline**?
 - The analysis per region and application can of course be done at different levels of depth. Can we offer e.g., two “**options**” in our proposal with different level of depth & sophistication of analysis and different price tag?
 - Can you provide any **guidance on the available budget** for this project?

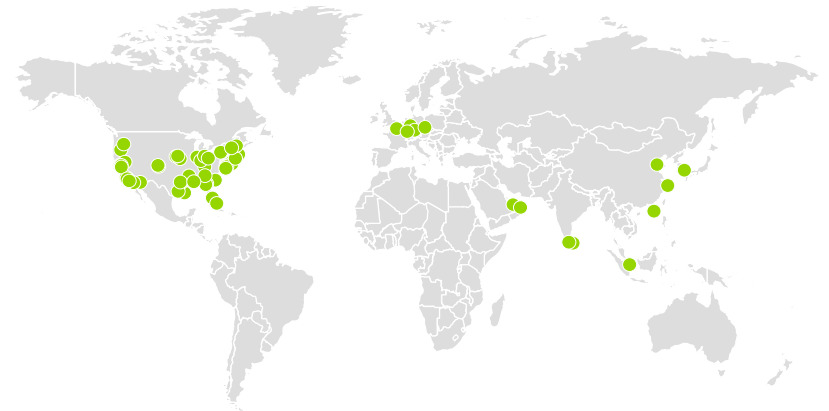
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AT A GLANCE: ECOFYS, A NAVIGANT COMPANY



Global consulting company founded in 1984 with the **mission** to enable **sustainable energy for everyone** – since 2016, Ecofys has been part of **Navigant's global Energy practice**



Ecofys has **five offices** in four countries: Utrecht, the Netherlands; Cologne & Berlin, Germany; Brussels, Belgium; London, United Kingdom – as part of Navigant, our experts are based in **more than 20 offices in the US and Canada, Hong Kong, and the Middle East**



We have over **600 experts** skilled in energy, climate, environment, economy, communication, law, and psychology – in 2007, 11 of our experts supporting the Intergovernmental Panel on Climate Change were awarded the Nobel Prize together with Al Gore



More than 30 years of experience in developing and evaluating policies, sustainability strategies, and scenarios for companies and sectors provides us with deep knowledge of markets and consumer behaviour



Our strength lies in our strategic understanding of complex energy and climate transition issues: Ecofys **connects the dots** within the triangle between **governments, energy players, and energy-intensive end-users**

SELECTED CUSTOMERS WE WORK FOR

