

MARCC

MArket Research for a Climate  
services Observatory

# Delivering a 360° view of the climate services market

EU-MACS Seminar

Helsinki, 19 June 2017



# The challenge

Knowledge gaps, lack of visibility & low awareness

The climate services market is changing, but **in which direction is it headed?**

**What strategies** should European suppliers and users take **in response to this movement?**

How can **economic benefits & uncertainties** be accounted for?

# About MARCO



MARCO is an EU-funded Horizon 2020 collaborative project. It will run for 2 years and involves **11 partners** from six countries across Europe.

Coordinated by the **European Climate-KIC**, the project gathers market research firms, climate scientists, and climate services practitioners & innovation actors.

# The consortium



Danmarks  
Tekniske  
Universitet



FMI

Helmholtz-Zentrum  
Geesthacht  
Zentrum für Material- und Küstenforschung



LGi  
sustainable innovation

Smith

unternehmertum  
Center for Innovation and Business Creation at TUW

AUSTRIA • DENMARK • FINLAND • FRANCE • GERMANY • UK



# A detailed view of the market

Demand and supply gaps pose a critical challenge to the expansion of the climate services market in Europe.



MARCO will address this challenge by providing a **complete, 360-degree view of the current market**, and how it can expand in the future.

# Project objectives

The MARCO project will:

- Assess the climate services market
- Carry out case studies
- Forecast future user needs
- Assess market growth until 2030
- Unveil opportunities
- Raise awareness and connect service providers and users
- Engage with stakeholders

MARCO will also make recommendations to policy makers, which may enable the creation of an EU climate services market observatory that will help monitor and evaluate the growth of the market.

# Insight into the climate services market



## DEMAND

Demand for climate services can be divided into current users and non-users, each with their own needs. MARCO explores what these needs are, as well as the decision-making processes that trigger a shift to the consumption of climate services. Needs within various economic sectors will be explored, complemented by face-to-face interviews regarding current market shortcomings.



## SUPPLY

In assessing the supply side of the market, MARCO will map business models currently in use, and identify best practices for suppliers in their business model design. A SWOT analysis of EU climate service suppliers on the international stage will also be carried out. Combined with global risk scenarios, the analysis will help to pinpoint areas of high vulnerability as well as high-capacity for investment.

# Insight into the climate services market



## FORESIGHT

MARCO will carry out a foresight exercise that outlines market growth through the year 2030. Employing both quantitative and qualitative approaches, MARCO will generate insight on economic and sectoral activities within the EU. As current forecasting approaches use differing assumptions about climate vulnerability and market risks, MARCO will develop a framework to assess these methodologies with improved accuracy.



## OPPORTUNITIES

A key feature of MARCO is that it identifies opportunities to propel market growth. This will be useful for both the supply and demand sides of the European market. The objective of this in-depth gap analysis is to reveal business opportunities by identifying the market areas where the demand is high but where no services are offered or are very limited.



# 9 case studies

Providing key knowledge that will be applicable to other similar sectors



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CATALONIA



**CRITICAL ENERGY  
INFRASTRUCTURES**  
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**FORESTRY & AGRICULTURE**  
FRANCE



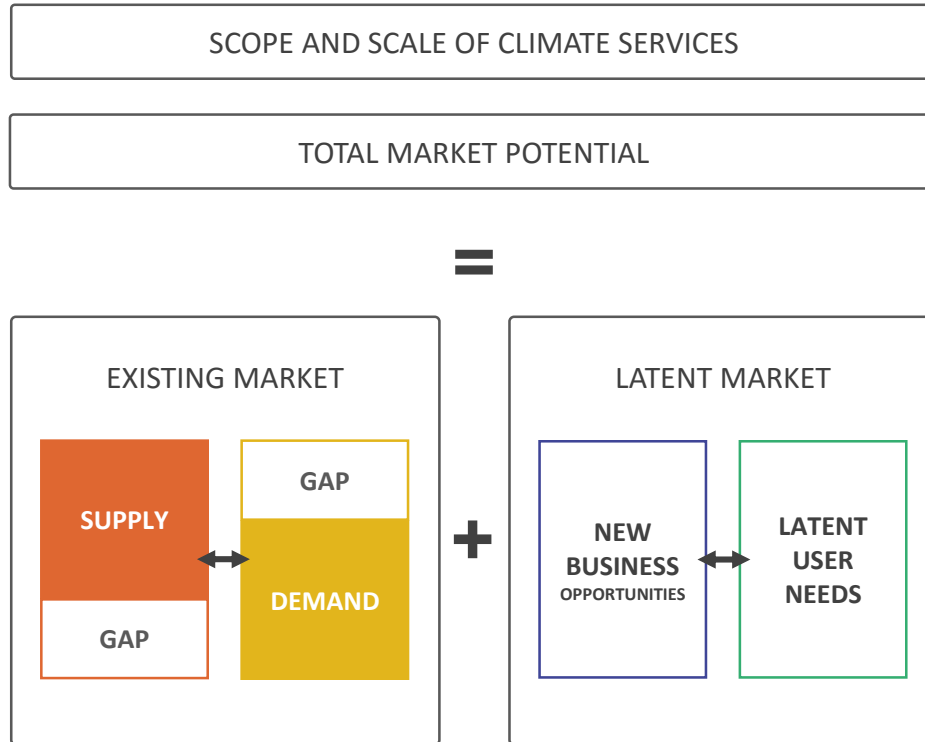
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# MARCO overview

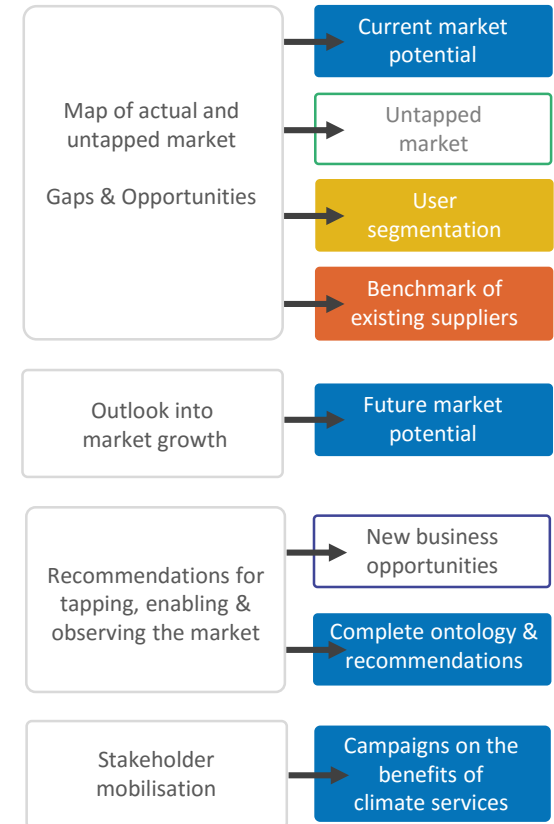
## Inputs & Outputs

### METHODOLOGIES

- Vulnerability analysis & risk assessments
- Case studies (sector & region specific)
- MLP\* & Qualitative interviews
- Quantitative analysis of demand
- Gap analysis
- Mapping of suppliers
- Business model innovation
- SWOT



### OUTPUTS



# Thank you!

## Get in touch for more information!



All of the reports produced in the project will be available for download on the MARCO website.



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