

Leading Social Housing Contractor

Case Study

Mergers & Acquisitions and Market Intelligence

PUBLIC SECTOR & SOCIAL HOUSING

Market Assessment: Micro-renewables & Energy Efficiency Retrofit

Background

Our client was a leading regional contractor in the social housing sector. They had spotted the potential of the 'green agenda' (micro-renewables & energy efficiency retrofit) for driving market growth, and they had already invested in building capability in this area and achieved some early wins. However, they now wanted to quantify the size and shape of the opportunity, in order to better focus their efforts going forwards.

Challenges

- Quantifying the eventual size of a market that was only just emerging
- Making a call on the 'when & what': When will the money be spent, and what will it be spent on?
- Assessing risks, such as the risk of funding changes.

PMSI approach

As market sizing was a critical aspect of this assignment, we:

- Triangulated a number of different sizing approaches
- Gave a firm 'PMSI view' rather than sitting on the fence
- Illustrated commercially-relevant sensitivities around this central estimate
- Assessed the key risks (e.g. political support for solar feed-in-tariffs), and gave both a PMSI view and alternative scenarios
- Based our work on a combination of comprehensive desk research and a significant number of primary interviews (circa 40).

Outcome

Our work confirmed there was a sizable market to go after, and helped the client unlock further funding to gear up for this growth. The client was also able to use our work to help plan their resourcing and business development activities.