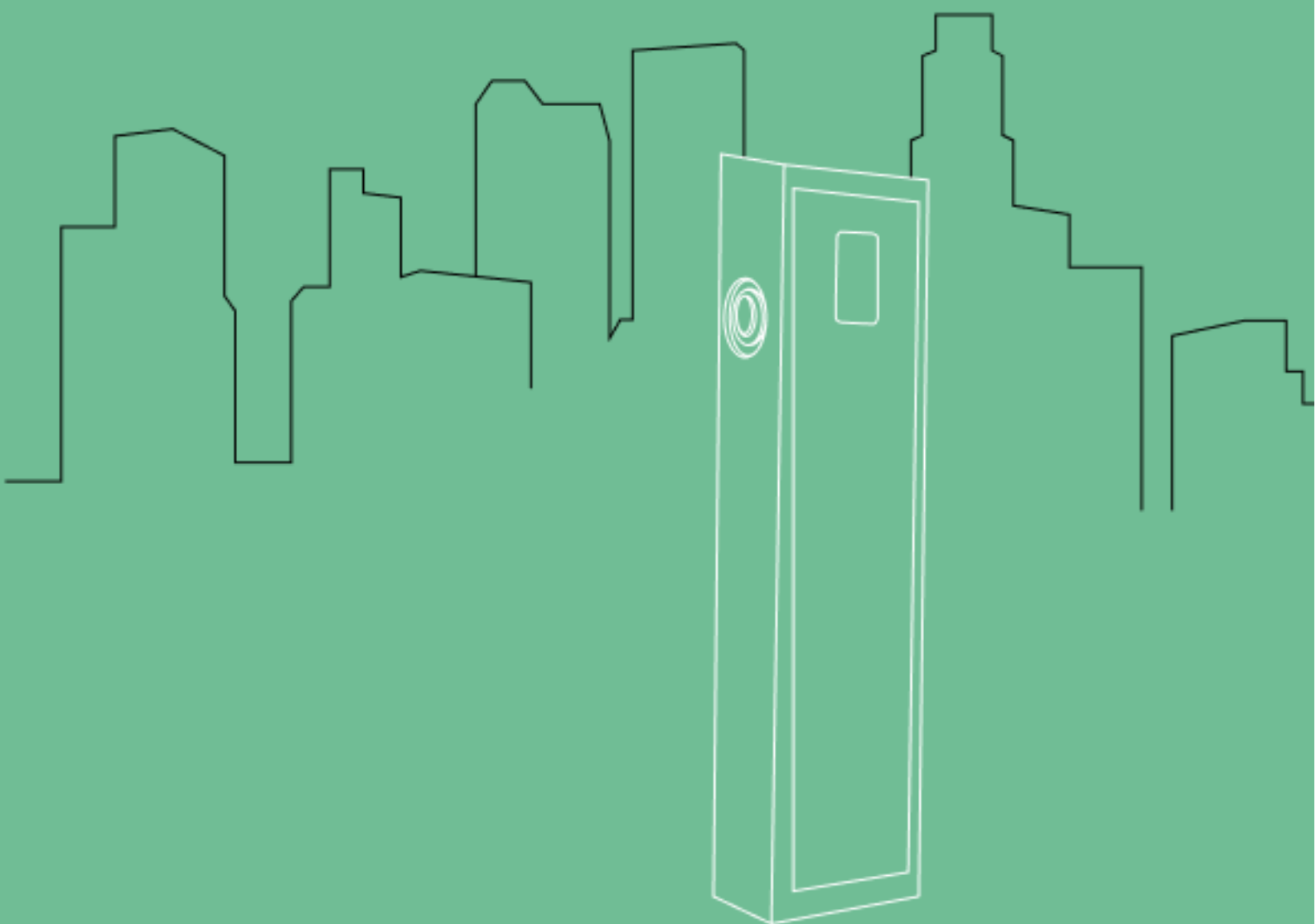


Driving Mobility Transitions

Designing a Market Entry Strategy for Charging Infrastructure in Commercial Real Estate



Thesis report by Caro van Term
MSc Strategic Product Design
March 2025

Master thesis

Driving Mobility Transitions: Designing a Market Entry Strategy for Charging Infrastructure in Commercial Real Estate

March, 2025

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Summary

This thesis presents a way for an established Charge Point Operator (CPO) to enter an upcoming market segment. The goal is to design a market entry strategy for Equans e-mobility to enter the corporate Alternating Current (AC) charging sub-market within commercial real estate.

Equans e-mobility is the market leader in public AC charging points. They exploit charging points across The Netherlands, both via governmental tenders and Business-to-Business (B2B) project leads. As they intend to keep their market leader position, Equans e-mobility wants to grow along with upcoming market segments.

The goal for this project is anchored in a future vision: "Obtaining a significant market share in the corporate AC charging sub-market by passively and actively reaching users and decision makers within the target market to stimulate sustainability goals, obtaining certifications and obliging to legislation with exploitation contracts."

The double diamond model forms the basis of this project, consisting of two phases of diverging and converging knowledge. In the first diamond, a research question is formulated as "How to strategically enter the corporate AC charging market within commercial real estate while leveraging Equans' USPs?". This question is split into three research areas: internal context, competitive environment, and target market. Through literature research, semi-structured interviews, trade fair observations and critical analysis of existing proposal documents, possible solutions are identified. The results from the first diamond show a need for standardisation, an opportunity to differentiate from competitors through positioning as the highest quality for money, and an opportunity to design a proposal that adheres to customer needs within a market segment.

In the second diamond, a market entry strategy is formulated, accompanied by tools that can be used to implement it. Market segments are formulated to classify which possible customers are strategically optimal, a proposal framework is designed as a tool to standardise communication within the new market segments, and a roadmap is created to show which steps need to be taken to enter the desired market segments. As an example of how these deliverables can be used posters and proposition one-pagers are designed to adhere to two specific market segments. All designs were validated by interviewing customers, internal experts and a competitor, and through a validation workshop.

In conclusion, Equans is recommended to incorporate passive, mass communication channels in a standardised proposal. Throughout their commercial acquisition process, opportunities for standardisation lay in adjusting communication to user and decision influencer market segments. To make their proposal more attractive for these segments, they should emphasise legislation, certifications, benefits of exploitation, and Equans' credibility as a reliable CPO.

This project shows how a company can increase their efficiency and generate new leads by changing the role of its proposal. Instead of creating a new proposal for each customer lead, standard variations within a proposal are created to adhere directly to a market segment's needs.

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Methods

Methods used in analysis phase

| | |
|---------------------------------------------|---------------------------------------------------------------------------------------|
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| Semi-structured external expert interviews | 5 interviews - Appendix N, Ch. 2.4, Ch. 2.5, Ch. 2.6, Ch. 6 |
| Semi-structured internal expert interviews | 6 interviews - Appendix O, Ch. 2.4, Ch. 6 |
| Analysing internal documents | Strategy/Communication - Internal analysis, Ch. 2.4 |
| Analysing communication with past customers | Internal analysis, Ch. 2.4 |
| Observing team meetings | Internal analysis, Ch. 2.4 |
| Analyzing Equans' communication channels | Internal analysis, Ch. 2.4 |
| Observations from PROVADA | Competitive environment & target market analysis - Appendix B, Ch. 2.5, Ch. 2.6 |
| Desk research into competitor's branding | Competitive environment analysis - Appendix C, Ch. 2.5 |
| Creating Brand DNA's | Competitive environment analysis - Appendix C, Ch. 2.5 |
| Mapping stakeholder interactions | Target market analysis, Ch. 2.6 |
| Semi-structured customer interviews | 8 interviews - Appendix P, Ch. 2.6 |
| Coding interviews | Atlas - Ch. 2.6, Ch. 6.1 |
| Clustering interview codes | Atlas - Ch. 2.6, Ch. 6.1 |
| Problem Tree Analysis | Approach - Ch. 2.3 |
| SWOT Analysis | Appendix K |

Methods used in design phase

| | |
|--------------------------------------|-------------------------------------|
| Brainstorms with Equans employees | Design - Appendix E, Ch. 5 |
| Peer review visual designs | Validation - Ch. 6 |
| A-B tests visual designs | Validation - Appendix H, I Ch. 6 |
| Qualitative customer validation | 3 interviews - Appendix M, I Ch. 6 |
| Qualitative internal validation | 1 interview - Appendix Q, I Ch. 6.2 |
| Semi-structured competitor interview | 1 interview - Appendix Q, I Ch. 6.3 |
| Design roadmapping | Design - Appendix G, Ch. 5 |
| Cost analysis communication channels | Synthesis - Appendix F, Ch. 3 |
| Validaton workshop | Validation - Appendix J, Ch. 6.1 |

Glossary

| | |
|-----------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| AC | Alternating Current, which refers to Charging stations charging at a regular capacity of 22kW normally divided over two charging points per station. |
| BEV | Battery powered Electric Vehicle, when referring to a BEV a fully electric car is meant, not a hybrid vehicle. |
| CP | Charging Point. One charging pole usually has two charging points for cars to connect to. |
| CPO | Charge Point Operator. A company that exploits charging points, like Equans e-mobility. |
| DC | Direct Current, used to refer to fast charging points that charge at a higher power capacity of normally 50kW up to 300kW. These are mostly used at motorways or to charge large electric vehicles. Fast charging is less common than AC charging and the charging price is significantly higher per kWh. |
| eMSP | e-Mobility Service Provider. A company that facilitates charging sessions by selling energy through charging passes and subscriptions. |
| kWh | kilo Watt hour. Unit of energy. |
| Market entry strategy | A predetermined plan to introduce an existing business model to a market that is not familiar with it. The market entry strategy contains the optimal market segment that should be approached, how to formulate a proposal to match this market segment's needs and knowledge, how to reach the optimal market segment, and how to position a proposition within the competitive environment. |
| Proposition | Concrete aspects of a company's offering as a service or product. Within this report, a proposition refers to the service or product a company offers towards a customer. |
| Proposal | The way a proposition is communicated and offered to possible customers. The proposal encompasses tone of voice, external communication and documents describing the proposition. |
| REU | Renewable Energy Unit. By selling energy from renewable sources, like Equans e-mobility does through charging points, a REU is generated for each kWh. These can then be traded on a type of stock market, generating extra revenue streams. |
| Tender | A formal offer to carry out work, supply goods, or provide services at a specified price. It is commonly used in the context of procurement processes where organizations invite suppliers to submit bids for contracts. The tender process ensures transparency and competitiveness, allowing the best value for money to be achieved. |
| Uptime | The time during which a charging point is on-line, therefore correctly working. |
| USP | Unique Selling Point. |

Dear reader,

In front of you is my thesis report; my final project as a student. This project was created together with Equans e-mobility, where I had the pleasure of working and learning in the past months. I have learned a lot about how e-mobility could develop, how to write a thesis report, and how to work as a strategic designer. Completing this graduation project was a challenge that I could not have completed without the help and guidance of many. Before diving into the project, I want to express my gratitude to everyone who was involved in the completion of my time as a student.

To start with Delft University of Technology, I am grateful for the many lessons I have learned here. Not only in my graduation project, but also in the years preceding it, I thoroughly enjoyed becoming a strategic designer. Thanks to Sylvia Mooij and Gert Hans Berghuis I could complete my education in Delft through this project. Thank you for helping me improve my academic storytelling and how to effectively use my skills as a designer in practice!

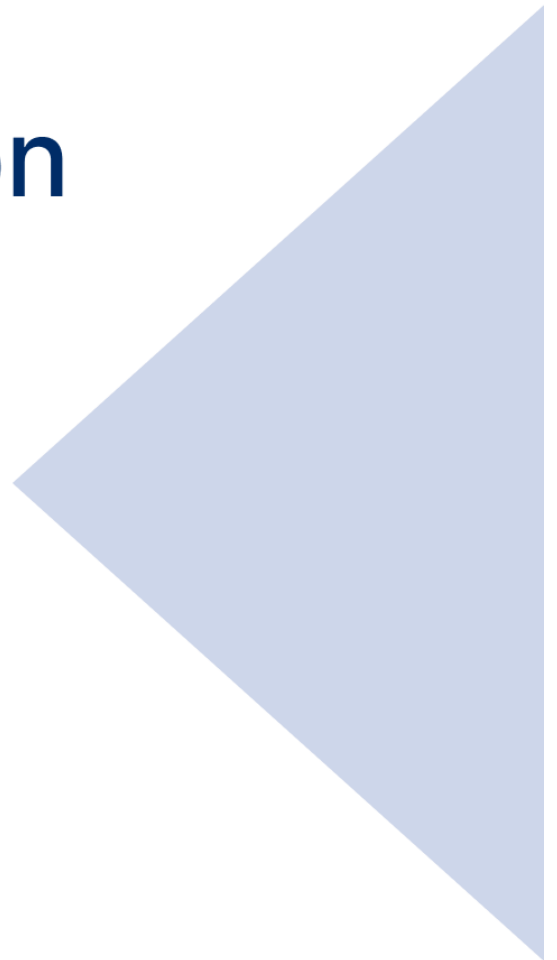
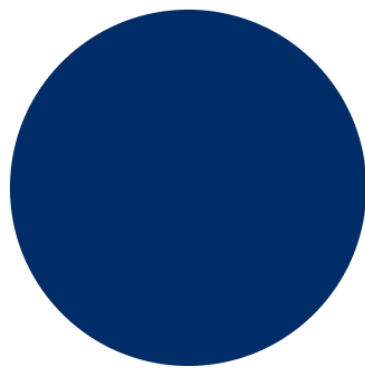
Although I completed a Master's at Delft University of Technology, I spent a significant part of it at Equans e-mobility. A big thank you to Peter Damen and Martijn Stolk who have guided me during this project! Your enthusiasm and support have helped me greatly and kept me motivated to create something truly useful for your team. My interest in e-mobility did not start at my graduation. Tim de Vlieger, Irma Stegmann and Iris van Dam have guided me through different teams and projects within e-mobility and taught me how to add value as a strategic designer within this company. Thank you for boosting my enthusiasm and trusting in my capabilities! Aside from mentors and managers, all my coworkers have contributed to making my work at Equans interesting and fun and made me feel like a valuable part of their team. I can truly say the values I highlight in this report make this company an amazing place to work; thank you for being professional, skilled, enthusiastic and sincere!

This project could not have been completed without support outside of my working environment. Thank you to my housemates, Rosanne Aartman, Annabelle de Groot and Chanel de Loos, for letting me use our home office, making sure I had dinner every day and cheering me up when I needed it! I am very lucky to have many amazing friends and family members who proofread my thesis, boosted my confidence, and were always available as a cheerful distraction. There are too many of you to list, but my gratitude is great (and apologies for never shutting up about charging points)!

I hope this report conveys how much fun I had diving into the world of e-mobility.

Caro

Introduction



In this chapter the general context and goals related to this project are introduced.

1. Introduction

The energy transition is a hot topic across all sectors in The Netherlands. As the urgency of sustainable development cannot be denied, opportunities arise for strategic implementation of technologies that support the energy transition.

E-mobility in the energy transition

Cars make up 56,9 per cent of Dutch CO₂ emissions in road transport (Centraal Bureau voor de Statistiek, 2022). Improving charging infrastructure and, therefore, facilitating more sustainable transport forms a significant possible development within the energy transition. Currently, 30 per cent of newly sold cars are fully electric, making up 5 per cent of all cars in the Netherlands. This number is rapidly growing, accelerated by legislation and EU-wide targets (ElaadNL, 2024; Schlögl, 2017).

Charge Point Operators (CPOs) operate with two possible teams: Business to Government (B2G) and Business to Business (B2B). B2G projects are based on tenders, initiated by municipalities and government authorities, which are bound to legislation and large-scale operational challenges. B2B projects are often smaller-scale and bound to specific demands based on the client. Equans wants to expand the B2B share of their business, which requires redesigning their proposal and commercial acquisition process.

Equans e-mobility

This graduation project for an MSc. Strategic Product Design student at the Faculty of Industrial Design Engineering at Delft University of Technology was initiated by Equans e-mobility, a Charge Point Operator (CPO) subsidiary of Equans NL, a company that operates as a technical service provider within the energy transition. Equans e-mobility is the current market leader in public charging infrastructure. Their expertise includes charging point installation, software development, energy procurement, business case modelling, asset management, data analysis, and engineering. To offer a proposition that encompasses all expertise, Equans' proposition is built on the DBFMO principle, meaning Design, Build, Finance, Maintain, Operate. They offer exploitation contracts where they manage customers' charging infrastructure for 10 to 15 years.

Opportunity in commercial real estate

The commercial real estate sector offers opportunities for Equans to increase their B2B turnover. Legislation and implementation of sustainable energy goals are currently relevant in this sector. Therefore, there is an increasing demand for grid connections. However, due to challenges posed by grid congestion and e-mobility legislation, integrating more sustainable infrastructure while ensuring financial benefits for CPOs remains difficult (Rijksdienst voor Ondernemend Nederland, 2024). Especially the corporate Alternating Current (AC) charging sub-market is expected to grow as a target market for CPOs, therefore forming the scope of this project. By offering charging infrastructure and software to manage the infrastructure's (energy) usage smartly, Equans could offer a future-proof way of adhering to legislation and managing grid load, thus contributing to improving sustainability in commercial real estate.

Project goal

In this project, a market entry strategy is created where the steps needed to realise the future vision are clarified. A market entry strategy is a way of introducing Equans' existing exploitation business model to a sub-market that is not familiar with this service. The market entry strategy contains the optimal market segment that should be approached, how to formulate Equans' offer to match this market segment's needs and knowledge, how to reach the optimal market segment, and how to position Equans' proposition within the competitive environment (Chang et al., 2018; Cristea, 2014; Banker et al., 2014; Iyer et al., 2019; Jalkala et al., 2014; Kotler et al., 2006; Cambridge dictionary, 2025; The Economic Times, n.d.).

Figure 1 shows the relation between a proposition and a proposal within a market entry strategy. As Figure 1 shows, the proposition is viewed as static in this project and will not be altered. In the context of this project, the proposition consists of Equans' exploitation service based on the DBFMO principle. The proposal entails how the proposition is offered to a specific customer. A proposal is tailored to fit specific needs in technology, communication, and documentation. Creating a proposal for each potential customer is a time-consuming process, exposing a general need for standardisation. Therefore, the goal for this project is to design a modular framework Equans can use to strategically create a proposal towards desired customers in commercial real estate. This proposal framework is part of a market entry strategy that will be formulated in this project.

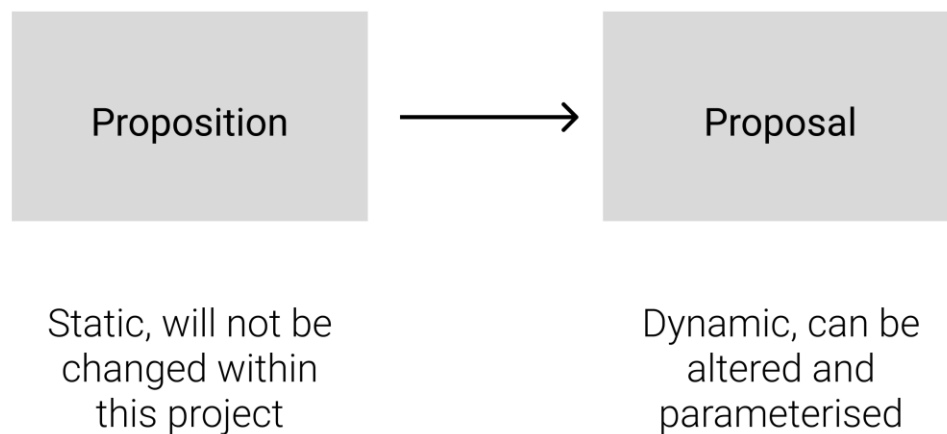


Figure 1: Relation between proposition and proposal within market entry strategy

Project structure

This project consists of multiple phases, conducted according to the double diamond model, as shown in Figure 2 (Saad et al., 2020). The first half of the double diamond model consists of research and analysis, or "designing the right things". In these phases the context around

this project is described, and from that, underlying problems and opportunities are defined according to the research question.

These analyses lead to a design goal, from which the second phase is initiated. This phase broadly consists of “designing things right”. The results from the first phase are translated into parameters for the framework described in the project brief. Through validation and iteration, the final solution is designed. The steps and analyses executed throughout this process are further specified in Appendix A.

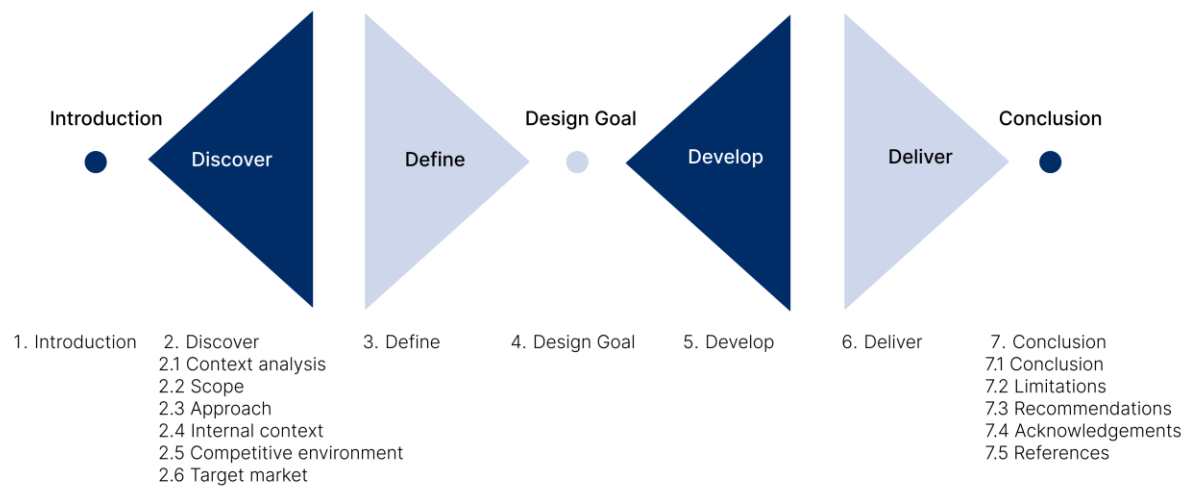


Figure 2: Chapters within the double diamond model



Discover

In this phase the context and possibilities for positioning Equans' proposition are analysed.

2. Discover

2.1 Context analysis

As described in the introduction, this project is about charging infrastructure for commercial real estate. Before in-depth analyses are conducted and a research question can be formulated, the general context is studied through literature research and expert interviews, specified in Figure 3. The topics researched are the energy transition, the Dutch e-mobility market, Equans e-mobility and commercial real estate.

| Semi-structured Expert interviews | | | |
|-----------------------------------|-------------------------------------------|------------------------------------------------------|---------------------------------------------------------|
| Company | Role | Expertise | Contribution |
| TU Delft | Prof. Management of the Built Environment | Urban development law Real Estate financial flows | Stakeholder interactions within real estate |
| PAS bv | Advisor Planned Economy | Finance for development of the built environment | General real estate development |
| Equans NL | Manager focus market Real Estate | Strategy development | Interview guide funnel Proposal strategy development |

| Semi-structured internal interviews | | | |
|-------------------------------------|--------------|------------------------------------------------------|----------------------------------------------------|
| Company | Role | Expertise | Contribution |
| Equans e-mobility | Director | Strategy development | General strategy & development for e-mobility |
| Equans e-mobility | MT member | Strategy development, technical business development | General strategy & development for e-mobility |
| Equans e-mobility | Director B2B | (B2B) Strategy development | General strategy for B2B, differentiation from B2T |
| Equans e-mobility | Manager B2B | B2B business development | Differentiation from B2T, general needs B2B |

Figure 3: Interviews used within this chapter

2.1.1 The energy transition

In the age of climate change, the housing crisis, and the depletion of fossil fuels, the urgency of sustainability is emphasised across all sectors. As The Netherlands are a fast-moving, export-focused and densely populated country, net congestion, housing shortage and nitrogen policy form significant challenges in the country's development (TNO, 2024). One overarching development regarding sustainable development is the energy transition. As this transition includes a society-wide change of technologies, mind-set and energy sources and usage, it often remains an abstract concept for most consumers. This thesis report touches upon sustainable developments for transport and infrastructure, from the perspective of a changing energy system and the commercial real estate landscape.

The traditional energy system

The traditional energy system has a linear flow from generation to usage, as illustrated in Figure 4. In The Netherlands, the government oversees energy availability across all sectors. TenneT, the national grid operator and Transmission System Operator (TSO), has two key responsibilities: managing the grid infrastructure and facilitating market operations. This involves continually balancing energy supply and demand, a task supported by Distribution System Operators (DSOs) (Betancourt-Paulino et al., 2021; Munir et al., 2020; Silva et al., 2021). Despite being one of the most stable grids globally, the Dutch energy system is inherently unstable (Netbeheer Nederland, 2013; TenneT, 2024). Seven regional DSOs—Liander, Enexis, Stedin, Enduris, Rendo, Coteq, and Westland infra—work to maintain this balance by serving customers and producers on both high- and low-voltage networks (Netbeheer Nederland, 2024).

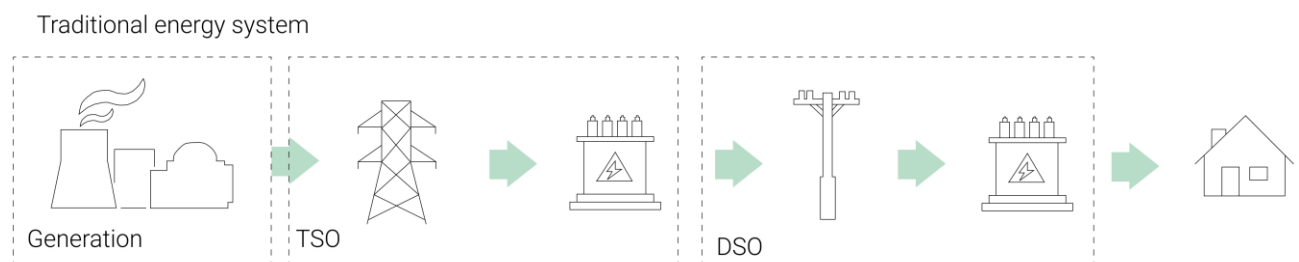


Figure 4: Traditional energy system

The smart energy system

As society shifts from fossil fuels to renewable energy sources, the availability of energy changes and, therefore, its usage. In the smart system, power generation relies mostly on solar, wind, geothermal and hydro-power (Qazi et al., 2019). Not only do the sources of energy change but the demand is expected to increase by 25 to 58 per cent in 2050, compared to 2019, due to climate change (van Ruijven et al., 2019). This emphasises the need for a smart, durable energy system that can fulfil demand. Solar and wind are considered the most promising sources of energy for sustaining expected energy needs, and they form the major sources of energy in further examples (Shafiullah et al., 2012; Andreas et al., 2017). Although the overall energy demand increases, peaks in demand differ over time. Therefore, the energy distribution system needs to be designed with the expected changes in supply and demand. If more energy than demanded is available it could be converted to the high voltage network and stored in batteries until demand exceeds supply. Eventually, electric car batteries can also be used for temporary energy storage through Vehicle to Grid (V2G) technology (Elaad NL, 2021). Especially since sustainable energy sources are highly dependent on weather circumstances, supply is hard to anticipate. To facilitate changes in supply and demand, energy distribution substations need to be able to convert between lower and higher voltage networks in both directions, as illustrated in Figure 5. This makes for a smart system that is more flexible and can sustain energy flows in multiple directions (Csanyi, 2018).

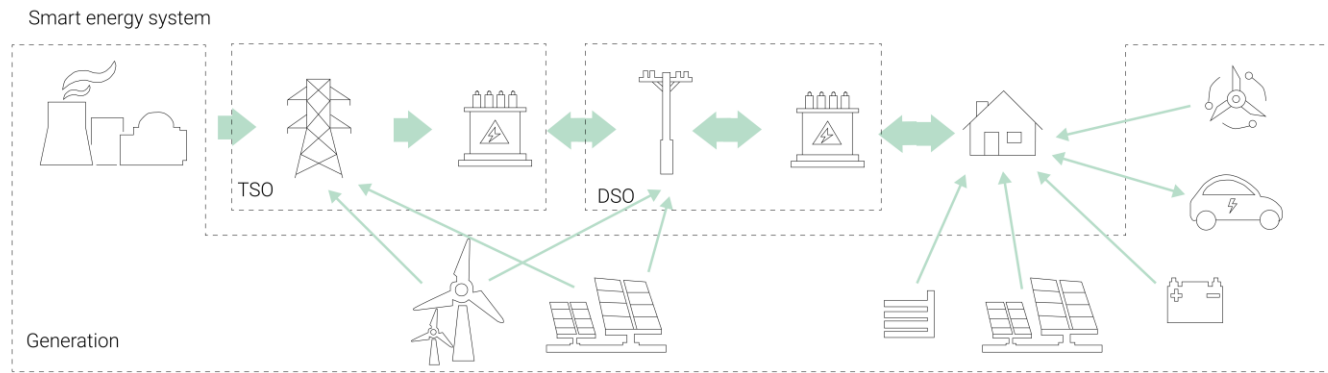


Figure 5: Smart energy system

This shift to a smart energy system is what is referred to as ‘the energy transition’. As the traditional energy system is deeply rooted in the functioning of buildings, infrastructure, facilitation of work and communication, this development is not merely technological. Across sectors, locations and infrastructure systems significant changes in technology, infrastructure and way of working need to be gradually implemented. To facilitate all energy-requiring processes, the rhythm of these processes needs to be adjusted to the availability of sustainable energy depending on weather conditions and demand based on predicted commutes between work, home and leisure (TenneT, 2024). This requires a different mindset and behaviour change regarding energy consumption (Behrouzi et al., 2016; Netbeheer Nederland, 2013; Qazi et al., 2019; Qu et al., 2024).

2.1.2 The Dutch e-mobility market

As the energy transition seems to be quite an abstract phenomenon for consumers, a clear touchpoint regarding the energy transition lies in the electrification of mobility. Electric cars are becoming an increasingly integrated part of the urban streetscape. Although it seems clear that electrical mobility is different from fossil-fuel-powered mobility, the infrastructure system behind electrical mobility is even more integrated in the energy transition than it might seem from the consumer’s perspective.

Around 2010, the Dutch market for public charging infrastructure emerged. Currently, six per cent of all cars in the Netherlands are fully electric. As European legislation dictates, all newly sold cars will have to be electric by 2030 (Elaad NL, 2024; European Commission, 2024; Outlook dashboard, 2024; Transport en Logistiek Nederland, 2024). This suggests a continuation of the growth in the e-mobility market, both in the production of cars and in the infrastructure needed to facilitate charging. This infrastructure network can be divided into three categories based on location, as illustrated in Figure 6.

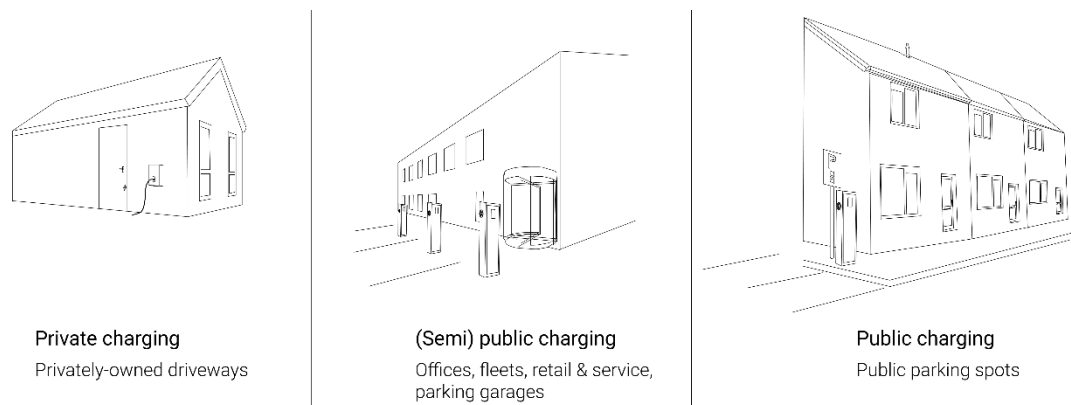


Figure 6: Three categories of charging infrastructure

Within these three categories, charging points (CPs) can be either Alternating Current (AC), charging at normal speed, or Direct Current (DC), fast charging. DC charging points are mostly used for charging larger vehicles or at transit locations like highways or distribution centres. In Figure 7, different sub-markets within the e-mobility market are shown by comparing AC and DC charges within the three categories of charging infrastructure.

The Dutch e-mobility landscape

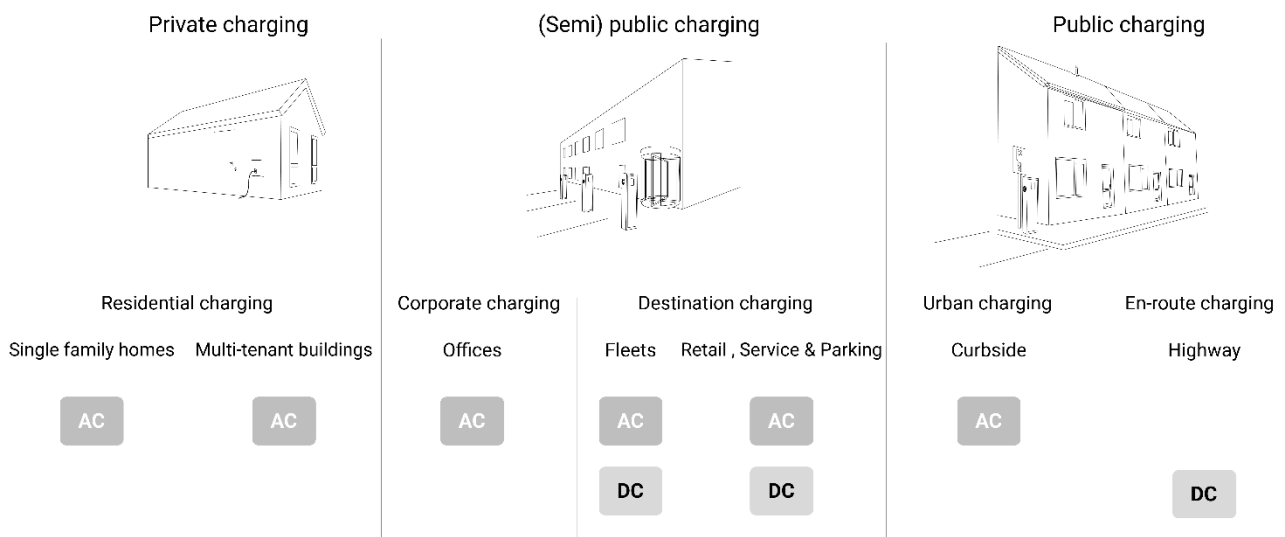


Figure 7: the Dutch e-mobility landscape, showing two types of charging within location categories

2.1.3 Equans e-mobility

Since the beginning of the Dutch charging infrastructure market, Equans saw a chance to enter this market in 2010 through the first public concession in Rotterdam. Anno 2025 Equans e-mobility is the Dutch public AC charging infrastructure market leader. They operate over twenty-seven thousand public charging points across the Netherlands, placed in the four biggest cities (Amsterdam, Rotterdam, The Hague and Utrecht) and several provinces. Tenders, published by governmental institutions lead this market. Applying to and operating from these tenders makes up most of Equans e-mobility's daily activities. They require operational management and a wide range of criteria written by the publishing institute. When a tender is won, Equans obtains the right to place and exploit charging infrastructure in the public space specified in the tender, until the contract expires. Usually, a contract covers ten years of exploitation. The whole process, from deciding to apply to a tender until operating the infrastructure placed within it, is referred to as Business to Government (B2G).

An upcoming field within the e-mobility market is Business to Business (B2B) sales. To diversify the portfolio for the e-mobility team with projects varying in scale, technical difficulty and customer type, (semi-)public concessions are initiated through this team. Although the service they offer is essentially the same, The B2B team has a significantly different way of working than the B2G team:

- B2B projects are not obliged to tender regulations. They are initiated either by Equans or by a possible customer, not by governmental institutions.
- B2B projects are smaller and more tailored, as the locations where charging infrastructure is intended to be installed differ greatly depending on the usage and owner.
- A core Unique Selling Point (USP) specific to this team is taking on the initial investment for the customer, this is actively communicated as a USP.
- B2B projects typically have a higher profit margin than B2G projects.

Equans aims to significantly increase the share of B2B sales in their portfolio by 2030. Appendix M specifies the exact shares Equans aims for. By increasing its efforts to gain a bigger share in the B2B market, Equans is diversifying its portfolio, joining a market that is expected to grow fast and expanding its network of customers. Therefore, obtaining a share in the charging infrastructure B2B market will be strategically beneficial.

2.1.4 Residential and commercial real estate

Within the context of the energy transition and sustainability regulations, the built environment touches upon several developments. In The Netherlands, nitrogen issues, housing shortage, sustainability regulations and net congestion stir up many challenges (4TU, 2024; TenneT, 2024). One concrete development is facilitating charging infrastructure within the built environment, accelerated by legislative measures, which will be elaborated on further in this report.

Regarding possible customers for Equans B2B team, residential and commercial real estate are two distinct markets, shown in Figure 8. Residential real estate entails properties meant for housing, which are privately owned. Commercial real estate covers a wide range of

development in housing, stores, publicly accessible buildings and corporate buildings (JLL, 2020).

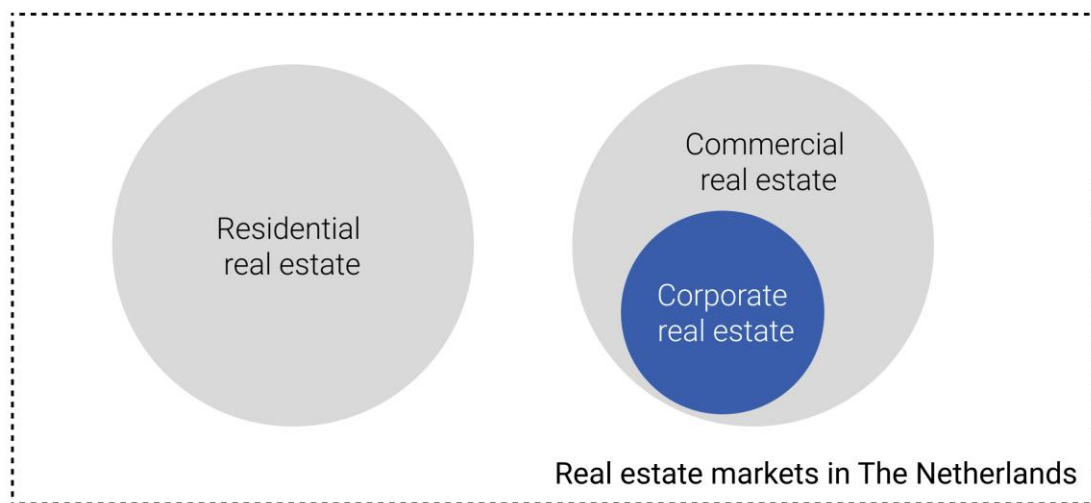


Figure 8: The real estate markets in The Netherlands

Within commercial real estate, charging infrastructure is part of developing new buildings and making existing properties more sustainable.

The three types of charging and accompanying ways of working can be connected to these markets within the built environment. Equans does not operate in residential real estate, as this does not comply with Equans' business model of exploitation contracts. Semi-public and public charging do fit within this business model.

2.2 Scope

Equans is the market leader in Dutch public AC charging and intends to keep that position. To do so, Equans e-mobility needs to adapt to market developments and anticipate on trends. In its current strategy, Equans e-mobility chooses to expand its B2B team to anticipate further growth in the B2B markets (Appendix M, O).

Office buildings especially need to comply with sustainability regulations, compared to buildings with other building destinations (European Commission, 2024; TKI Urban Energy, 2021). Furthermore, through these measures, logistic service providers also urgently need to electrify their fleet. Customers in commercial real estate and logistics are part of Equans' existing customer portfolio. Therefore, due to existent client relations and external market push towards sustainable transport and offices, Equans has decided to focus its B2B portfolio on four sub-markets: corporate AC charging, destination AC and charging, and DC charging for logistic fleets, as shown in Figure 9. All of these sub-markets contain different customers, motivations and technical implementation. Therefore, a clear scope needs to be defined.

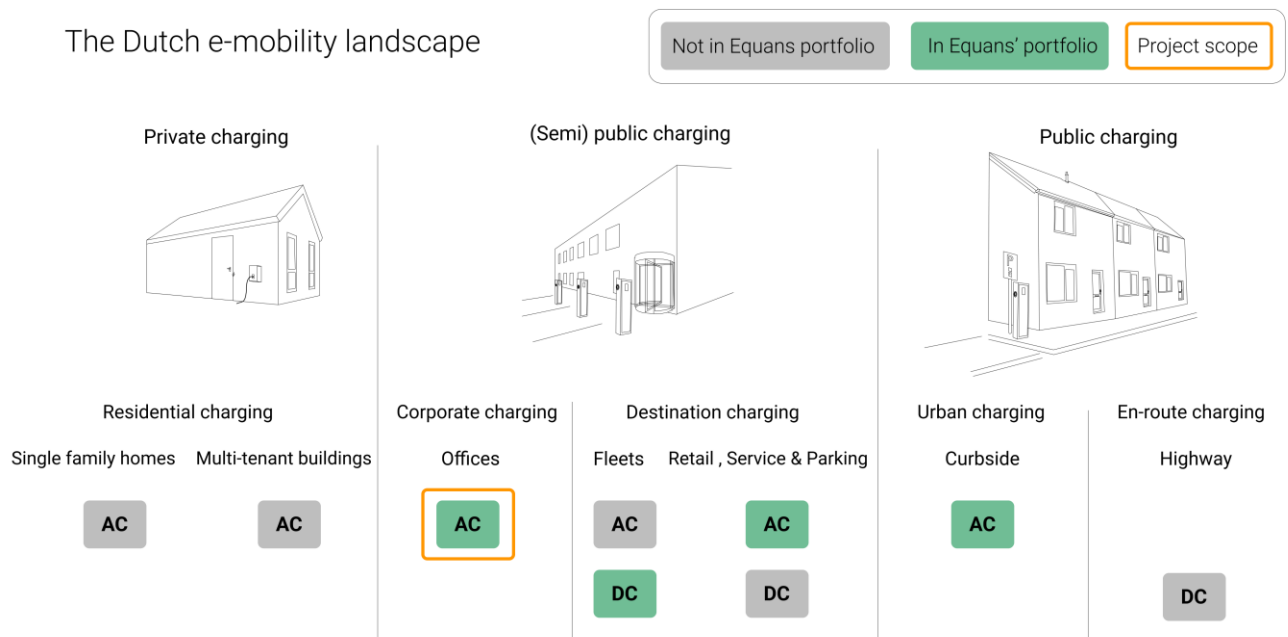


Figure 9: E-mobility sub-markets in Equans' portfolio

As mentioned before, corporate charging infrastructure forms a touchpoint for the energy transition, sustainability regulation and legislation. As mentioned in expert interviews, commercial real estate is known for large revenue streams in The Netherlands, large margins in development and steady long-term investments (Appendix O). Additionally, commercial real estate is urged to improve sustainability by legislation (4TU, 2024; European Commission, 2024). As transportation and office accommodation often form the largest sources of emission for corporate parties, it is often worthwhile to facilitate charging infrastructure at their properties. Therefore, from Equans' perspective, office charging forms a desired customer pool to increase their B2B share.

This project focuses solely on corporate AC charging for commercial real estate within B2B sales. The corporate charging sub-market specifically is suitable for Equans' expertise as the required infrastructure is technically similar to public charging points and its use can be reliably forecasted when creating a business case. This sub-market is expected to undergo intense growth driven by (European) legislation, sustainability market trends and new patterns of energy usage accompanied by the energy transition (ElaadNL, 2024; European Commission, 2024; Nationaal Laadonderzoek, 2024; Netbeheer Nederland, 2024). These drivers are expected to create an office AC charging market that is comparable to the size of the public AC charging market by 2030 (ACEA, 2024; Electric Mobility Market Size, Share & Trends Report by 2030, 2025; Electric Vehicle Market Size, Share, Growth, Trends & Analysis by 2030, 2025; P3 consulting, 2023). In 2030, Corporate AC charging will likely surpass the number of charging points in public AC charging, as shown in Appendix M.

2.3 Approach

With the context clearly defined and quantified, the project brief can be effectively translated into a structured research methodology. The assignment from the project brief is as follows:

“Design a proposal framework to strategically enter newly defined market segments for Equans E-mobility in the context of business-to-business sales in corporate AC charging”

Equans has deliberately chosen a business model where they offer exploitation contracts to clearly defined sub-segments within the B2B and B2G charging markets. Therefore, the goal of this project is not to change that trajectory and accompanying USPs but to turn that trajectory into action through a market entry strategy. This leads to the following research question:

“How to strategically enter the corporate AC charging market within commercial real estate while leveraging Equans’ USPs?”

The underlying problems need to be clearly defined to answer the overarching research question. From an analytical approach, a problem tree analysis is applied as a framework for defining underlying problems. Figure 10 shows the sub-questions related to the primary assignment in the problem tree analysis.

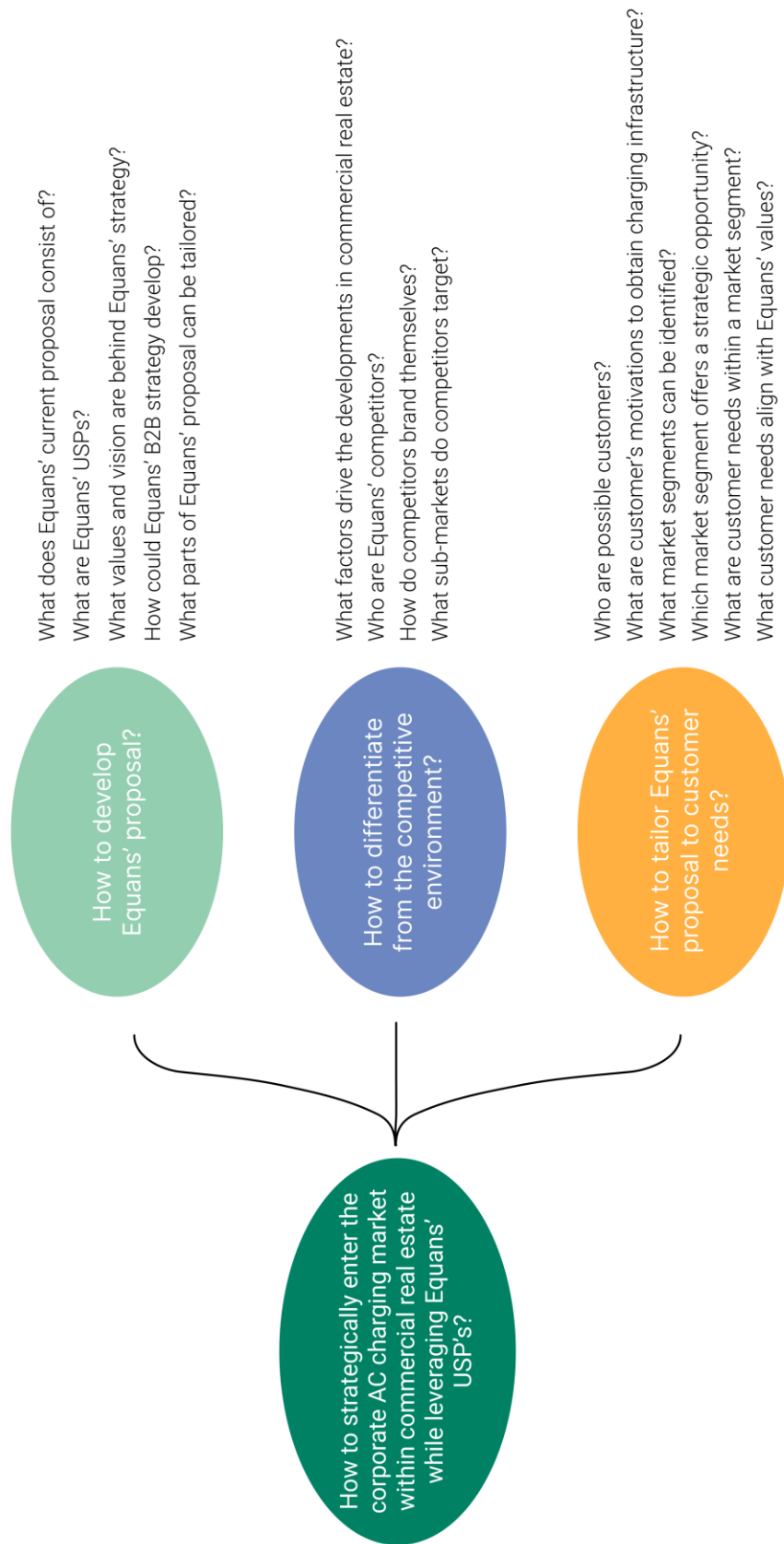


Figure 10: Problem tree analysis

The problem tree analysis shows that solving the design assignment entails studying three different research areas that need to be analysed before strategic advice can be formed, as visualised in Figure 11. These areas touch upon various approaches to define a market entry strategy that is tailored towards the desired customer, differentiates from competitors' proposals, and convinces the customer to choose Equans. The main goal of answering the research question is to form a concrete, strategic way to enter the desired target market in the form of a market entry strategy.

"How to strategically enter the corporate AC charging market within commercial real estate while leveraging Equans' USP's?"

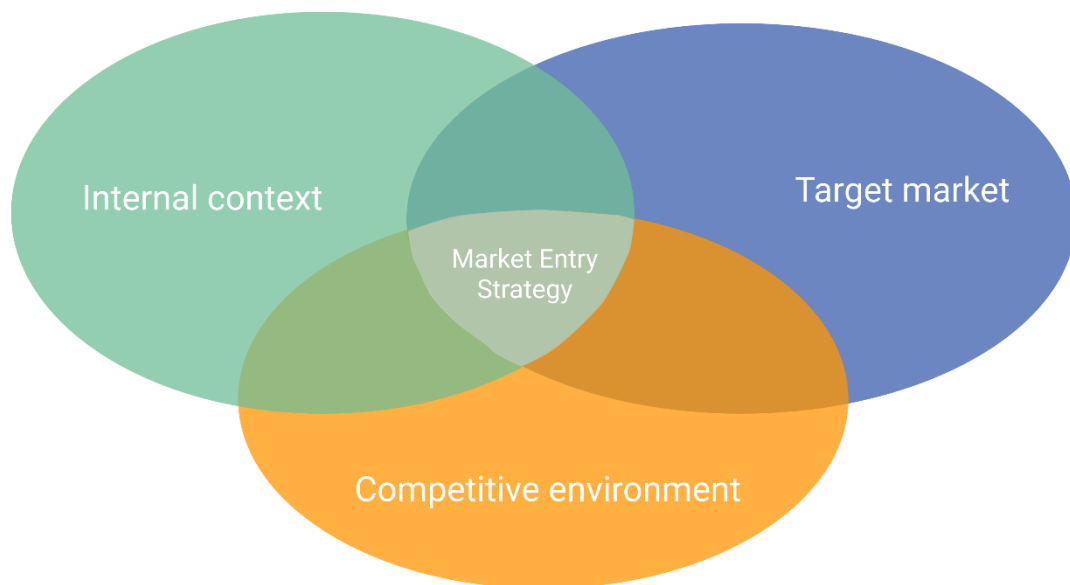


Figure 11: The design assignment divided into three research areas to cover the necessary aspects of a market entry strategy

2.4 Internal Context Analysis

2.4.1 Introduction and Methods

The main research question to answer within the internal context is: "How to develop Equans' proposal?". Before this question can be answered, the following sub-questions will be analysed:

- What does Equans' current proposal consist of?
- What are Equans' USPs?
- What values and vision are behind Equans' strategy?
- How could Equans' B2B strategy develop?
- What parts of Equans' proposal can be tailored?

To answer all sub-questions, the following methods were used:

- Conducting semi-structured interviews, specified in Figure 12.
- Analysing internal documents used in the commercial acquisition process, like quotation templates, specific offerings to previous customers, and business case templates.
- Observing team meetings on B2B and general commercial strategy
- Analysing external communication channels, like the e-mobility website, LinkedIn posts, and news articles.

Semi-structured internal interviews

| Company | Role | Expertise | Contribution |
|-------------------|--------------------------------|------------------------------------------------------|----------------------------------------------------|
| Equans e-mobility | Director | Strategy development | General strategy & development for e-mobility |
| Equans e-mobility | MT member | Strategy development, technical business development | General strategy & development for e-mobility |
| Equans e-mobility | Director B2B | (B2B) Strategy development | General strategy for B2B, differentiation from B2T |
| Equans e-mobility | Manager B2B | B2B business development | Differentiation from B2T, general needs B2B |
| Equans e-mobility | Business developer real estate | Real estate lead generation | B2B acquisition process, desired lead generation |

Figure 12: Semi-structured internal interviews related to answering sub-questions in the internal context

2.4.2 What does Equans' current proposal consist of?

The proposal consists of all communication and documents used to convey the proposition to the desired customer, so the concrete proposition is analysed first. By reading templates used to formulate offers to customers, offerings sent to previous customers and by

conducting internal interviews, a concrete overview of Equans' proposition is formed (Appendix N, P). Figure 13 shows Equans' services according to the Design, Build, Finance, Operate, Maintain (DBFMO) principle (Pijnappel, 2012). Because Equans' contracts are based on this principle, they are responsible for the charging points in the contract during the entirety of the exploitation process. A contract generally lasts 10 to 15 years. For customers, this means Equans is the only party they need to communicate with about their charging infrastructure. Because of this wide range of responsibilities and expertise, Equans refers to themselves as an 'A-Z CPO'.

| Current B2B proposition aspects according to DBFMO principle | | | | |
|-------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------|
| Design | Build | Finance | Maintain | Operate |
| Create a charging infrastructure specifically designed for a location's energy usage, available parking and legislative needs | Realise the design without additional efforts from the client to find contractors | Fully take over the initial building and installation investment, this will be recuperated by a margin on charging tariff for the duration of the contract. | Provide a 24/7 complaint and repair service. Repairs are done with in-house mechanics and engineers so no additional party is needed. | Manage software and hardware to ensure reliable charging points with up-to-date software an 99% uptime |

Figure 13: Current B2B proposition

After an interview with a real estate business developer within Equans, the process from lead generation up to signing a contract was recreated in Figure 14, referred to as the commercial acquisition process (Appendix P).

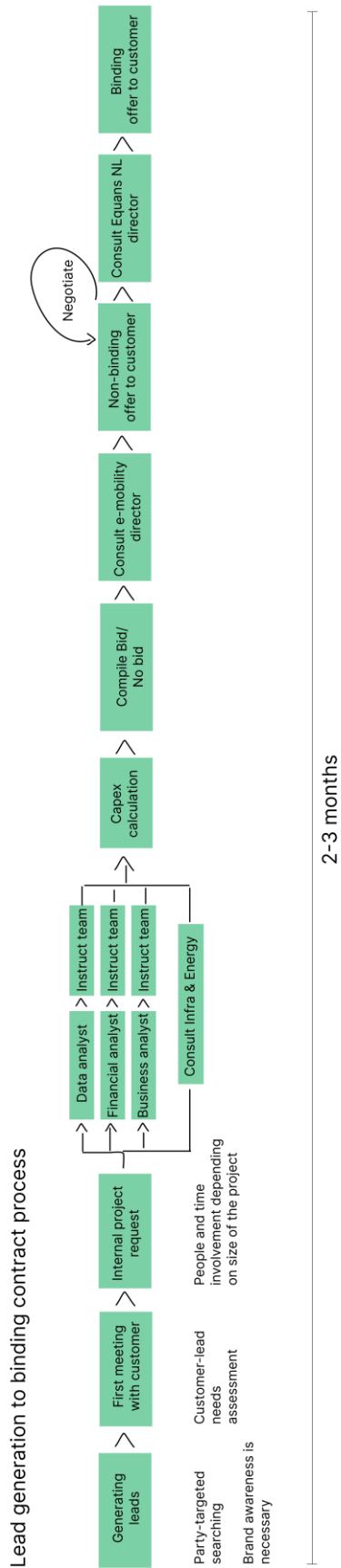


Figure 14: Commercial acquisition process within the B2B team

This process overview exposes several aspects the B2B team wishes to improve:

- The process is lengthy, shorter processing time would reduce the general workload
- Only at the end of the process can a guarantee of collaboration be given. This means most working hours are invested before the return on investment can be anticipated, making a business case difficult to justify.
- Several teams and directors have to be involved in the process. It would be helpful if the B2B team could take over some of these tasks
- Within the process, an offer is reviewed, calculated and negotiated multiple times. This creates a need for standardisation within the proposition

All improvements mentioned can be connected to a need for standardisation. This project will contribute to this need by creating a proposal framework that can be used to standardise the process of conveying the proposition, both by parameterising the proposal and by standardising the range of possible customers into market segments.

Internal interviews and observations provide an overview of the documents and communication channels used in the commercial acquisition process, as shown in Figure 15.

Aspects within the current proposal

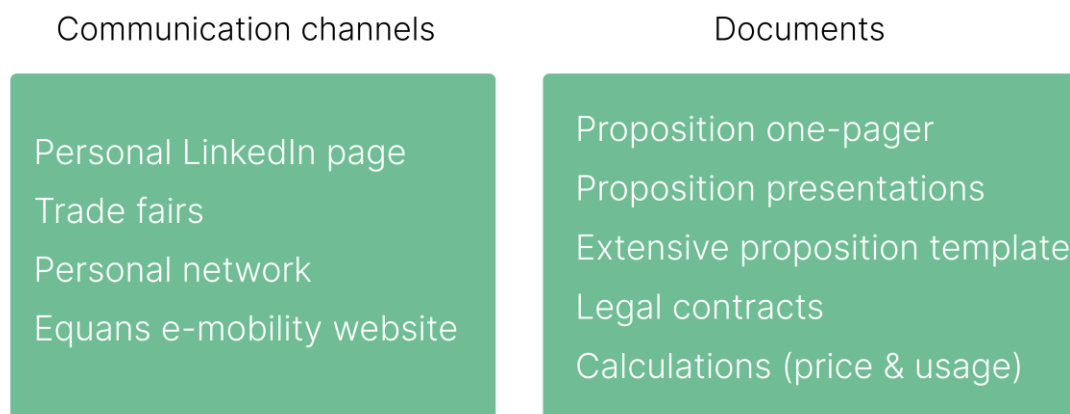


Figure 15: communication channels and documents in the current proposal

Although all aspects mentioned offer fruitful opportunities to improve in the future, they cannot all fit into this project's scope. Therefore, standardisations and improvements will only involve document formats and communication channels that do not require substantial changes to the proposition when altering them. In the list of current documents and communication channels, legal contracts, extensive proposition templates, and calculations are directly connected to the contents of the proposition. Therefore, their contents will not be used as input for the proposal framework.

When analysing current communication channels, a general conclusion can be drawn on the acquisition strategy. The channels are either connected to the B2B team's personal network or the general communication from Equans. There are no channels dedicated to the B2B

team specifically, apart from the team member's personal LinkedIn pages and network. Using these personal channels results in a push strategy. Equans actively approaches all new leads, not pulling them in by communication reaching further than personal networks. This costs great effort and makes it difficult to diversify the customer portfolio within real estate.

Conclusion

The current proposal contains a proposition that covers the entire exploitation process. To generate leads, the B2B team is dependent on personal networks and communication channels. The proposal contains lengthy processes, uncertainty for return on investment and various substantial documents and expertise, exposing a need for standardisation. As the B2B is a small team within the CPO, they need to make a claim to the other team's time. For instance, legal documents, business case calculations and software development all require expertise outside the B2B team. Standard formats for these aspects within the business case for specific customer types would lower the initial workload and processing time for a new project. In later stages, when collaboration is closer to certainty than merely a goal, the specific business case can be tailored further. In this project, improvements can be made in communication channels, usage of standardised documents and the role of marketing in the acquisition process.

2.4.3 What are Equans' USPs?

When viewing Equans e-mobility as an external, you are led to the general website. Figure 16 gives a general impression of this communication channel.

USPs communicated on Equans' website

The screenshot displays the Equans website's e-mobility section. At the top, the Equans logo and navigation menu are visible. The main heading is 'Elektrische Mobiliteit' (Electric Mobility). Below this, a sub-heading reads 'De partner voor betrouwbare laadinfrastructuur' (The partner for reliable charging infrastructure). Three bullet points highlight key services: 'Totaaloplossingen op maat door onze integrale aanpak' (Customized total solutions through our integral approach), 'Kwalitatief hoogstaand beheer en onderhoud' (High-quality management and maintenance), and 'Lange termijn advies gebaseerd op technische expertise' (Long-term advice based on technical expertise). A large image shows a modern building with a parking lot. To the right, a green box titled 'Integrale aanpak' (Integral approach) explains the company's expertise in developing integral solutions for the transition to electric mobility. Below this, a grid of six service tiles is presented: 'Advies' (Advice), 'Ontwerp' (Design), 'Installatie' (Installation), 'Onderhoud' (Maintenance), 'Beheer' (Management), and 'As a service'. Each tile includes a brief description of the service. At the bottom, three columns provide more details: 'Laden op de zaak' (Charging at the office), 'Laden in de logistiek' (Charging in logistics), and 'Openbaar laden' (Public charging). Each column includes a small image and a link to learn more.

Elektrische Mobiliteit

De partner voor betrouwbare laadinfrastructuur

- Totaaloplossingen op maat door onze integrale aanpak
- Kwalitatief hoogstaand beheer en onderhoud
- Lange termijn advies gebaseerd op technische expertise

Integrale aanpak

De toenemende druk op het elektriciteitsnet kan tot netcongestie uitdagingen leiden in de vestigingsregio. Equans is expert in het ontwikkelen van integrale oplossingen die de transitie van een wagenpark kunnen versnellen. Zo realiseren wij capaciteitsuitbreiding, integreren we lokaal opgewekte energie en onderzoeken we samenwerkingsmogelijkheden in de regio.

| | | |
|---------------------------------------------------------------------------------|---------------------------------------------------------------------------|------------------------------------------------------------------------------|
| Advies Advies over de juiste laadinfrastructuur en energievoorziening | Ontwerp Ontwerp van een laadplan en energie installatie op maat | Installatie Installatie en inbedrijfstelling door ervaren monteurs |
| Onderhoud 24/7 support met preventief en reactief onderhoud | Beheer Helder inzicht in verbruik en kosten via onze dashboards | As a service Dienstverlening in koop, lease en exploitatie aanbod |

Laden op de zaak
Equans realiseert slimme laadinfrastructuur voor zakelijke wagenparken. Onze smart charging oplossingen zorgen voor een optimaal en kostenefficiënt gebruik van de energieaansluiting.
[Lees meer over onze laadoplossingen in de zakelijke markt.](#)

Laden in de logistiek
Wij bieden totaaloplossingen voor de laadinfrastructuur van elektrische vrachtwagens. Zo ontzorgen we onze logistieke klanten en groeien we mee in de opschaling naar een zero emission transportwereld.
[Lees meer over onze expertise over laden in de logistieke sector.](#)

Openbaar laden
Equans is marktleider als het gaat om de realisatie van laadinfrastructuur in de publieke ruimte. Onze laadpalen leveren altijd 100 procent groene stroom, grotendeels opgewekt door lokale windmolens en zonnepanelen.
[Lees meer over onze dienstverlening in het openbare domein.](#)

Figure 16: USPs communicated on Equans' general website

Through this communication channel the three sub-markets Equans e-mobility operates in are communicated. Equans' way of working is described with words such as 'customisation', 'complete solution', 'as-a-service', 'integrated approach', 'high-quality', and 'technical expertise'.

Internal interviews, which can be found in Appendix P, and observations from meetings highlight USPs related to the team's way of working and expertise:

- A-Z CPO with in-house expertise
- Thorough calculations and business cases
- High uptime of 99 per cent

Documents used in communication with B2B clients communicate the following USPs:

- Lack of investment for the customer. Equans takes up all financial responsibilities for installing charging infrastructure. They earn this back through their margin on the price per kWh when the charging points are in use.
- As market leader in public charging infrastructure, Equans has extensive experience in managing charging infrastructure projects on varying scales.
- Equans is an 'A-Z CPO', meaning they have all the necessary resources to conduct a DBFMO contract in-house. This means that no other parties or contracts need to be involved in a project when collaborating with them.
- An uptime of 99 per cent, emphasising the reliability of their hardware and software
- Total unburdening of the customer, both financial and through technical maintenance

Conclusion

The USPs Equans communicates are linked to unburdening of the customer, DBFMO exploitation contracts, and in-house expertise as market leader in AC public charging and A-Z CPO. These are mentioned often in communication, both with customers and in public communication channels.

2.4.4 What values and vision are behind Equans' strategy?

Equans e-mobility originated in 2010. Since then, they have grown from a start-up to a scale-up with around 80 Full-Time Equivalents (FTEs). This growth is accompanied by changes in the way of working. Internal teams were formed to improve efficiency and in-house capabilities. The B2B team is a clear example of this growth. Unlike the other internal teams, B2B adheres to different sub-markets. However, they operate from the same strategy as the B2G team.

Interviews with members of the general management team, which can be found in Appendix P, put emphasis on the underlying values and motivations behind e-mobility's strategy.

Employees and team spirit are mentioned as the company's most important assets. Employees show personal involvement with charging infrastructure and its role in the energy transition. During the onboarding process employee's enthusiasm and opportunities for growth of the company are frequently mentioned.

Equans e-mobility's mission statement is: "Zorgeloos laden, altijd gaan!", freely translated: "Carefree charging, always on the go!". This slogan is clearly connected to the USPs mentioned in the previous research question: Unburdening, high up-time and a market leader position to validate expertise. Observations from internal communication and meetings result in the following words adhering to the values behind this statement: Good, Green, Go. These observations have given a general image of Equans e-mobility's personality; they are professional, technically skilled, enthusiastic and sincere.

All observations and interview findings can be combined into a brand DNA, as seen in Figure 17 (Beverland, 2021).

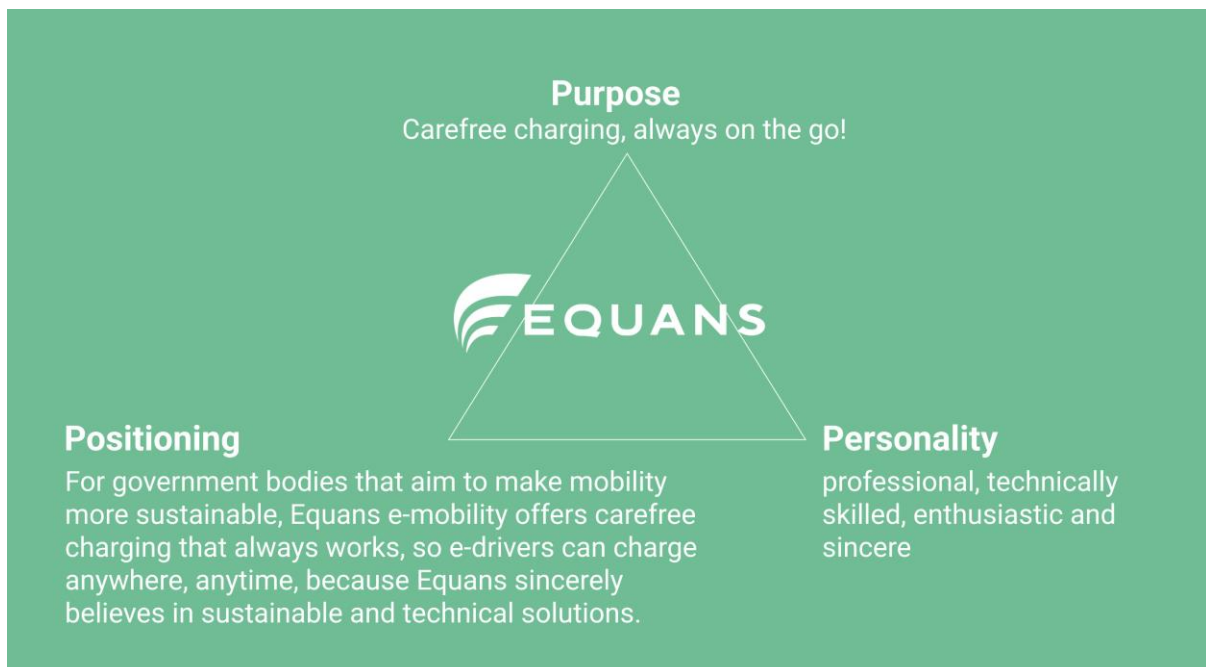


Figure 17: Brand DNA for Equans e-mobility

Conclusion

Equans e-mobility's strategy has resulted in a rapidly growing company that is market leader in public AC charging. The employees form an important asset and are professional, enthusiastic and sincere. In external communication, the company's key-words are 'good, green, go'.

2.4.5 How could Equans' B2B strategy develop?

As mentioned while answering the previous research question, Equans e-mobility has undergone significant growth. Since the origination of the B2B team, Equans has diversified its portfolio into four sub-markets: corporate AC charging, destination AC and charging, and DC charging for logistic fleets. Although these sub-markets have different customers, technologies and project scales, B2B is seen as a team within Equans e-mobility, not as a separate business unit with its own strategy. This creates a paradoxical decision regarding strategy. Equans has diverted its strategy by creating a B2B team and incorporating new submarkets in its customer portfolio but has kept this different way of working under the same general strategy. In internal interviews with members of e-mobility's general management and the B2B team's management, it was mentioned that, eventually, this could change (Appendix P). As Equans e-mobility has grown naturally rather than according to a predetermined growth strategy it is difficult to decide when strategic direction needs to be changed according to portfolio diversification.

When viewing B2B as a separate business unit, with a focus on AC corporate charging, a new Brand DNA can be formed, as shown in Figure 18. Compared to Equans e-mobility's general Brand DNA, they have clear USPs they market towards customers, more tailored projects and emphasise unburdening and financial benefits. B2B puts more emphasis on smart and tailored solutions than e-mobility in general, where the focus lies on the long-term management of charging infrastructure.

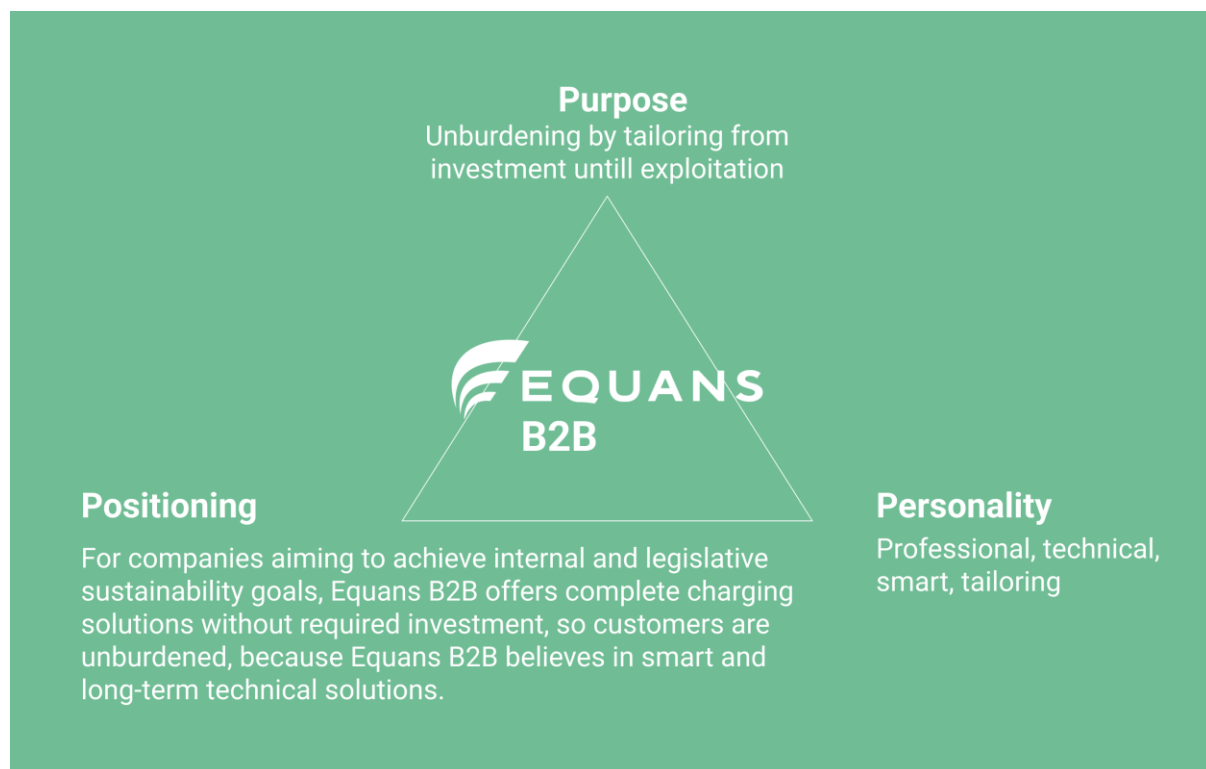


Figure 18: Brand DNA for Equans B2B AC corporate charging

After conducting several internal interviews a need for incorporating a 'pull strategy' in addition to the 'push strategy' described while analysing the commercial acquisition process arises (Appendix P). If new customers can be reached through both active and passive communication, acquiring new leads will be less time-consuming.

Conclusion

Equans' B2B team has originated organically from Equans e-mobility's strategy. As they further diversify their portfolio and their internal company share and external market share grows a need for a new strategic direction arises. This strategic direction should focus on diversification from competitors, while emphasizing internal strengths. Marketing and communication offer clear touchpoints for this strategy development.

2.4.6 What parts of Equans' proposal can be tailored?

As explained in the introduction, this project is aimed at creating a proposal framework, not about changing the proposition. Within the proposal several aspects can be viewed as parameters. Without changing their function or substantial meaning, changes in how they are formulated, communicated or emphasised can be made. In sub-question 2.4.1, an overview of documents and communication channels used in the current proposal was given. To find possible parameters within the current proposal, several documents were reviewed:

- Main offer template: This is an extensive textual document that covers general USPs for Equans, technical specifications, terms and conditions, and prices. Figure 19 shows several pages from this document where the yellow markings show what needs to be adapted before the document can be sent to a customer (Appendix N).
- Template explaining calculations (Appendix N).
- Final offer used for a customer (Appendix N).

1. ONTWERP EN REALISATIE VAN UW LAADPLEIN
Een totaaloplossing op maat

Uw uitdaging
Ter ondersteuning van de verdere verduurzaming van haar bedrijf en wagenpark heeft **Reaan Klant** het voornemen uitgesproken om het huidige laadplein voor elektrische voertuigen te **verbouwen** en uit te breiden naar **locatie laadplein**.

Om in de groeiende laadbehoefte van het wagenpark te voorzien wil **Reaan Klant** een laadplein **aanpassen** (aangepast) laadstations realiseren. Ieder laadstation bevat twee laadpunten die twee voertuigen kunnen voorzien. Equans zorgt voor het ontwerp, de levering, de volledige installatie, onderhoud van de laadstations (eventueel aanvullende details, bijvoorbeeld: vanaf de ondergrond inclusief het leggen van kabels tussen ondergrondse kabel en laadstations, het plaatsen van **gel** het plaatsen van hangende **PVC** laadstation deuren).

Het ontwerp
Op basis van ons bezoek aan **Reaan Klant** in **Soest** hebben wij een ontwerp opgesteld dat (omgeving) ontwerp, bijvoorbeeld op de eerste verdieping van de parkeergarage kabelgoede naar 20 verschillende laadstations die elk vier laadpunten bieden. De parkeerplaatsen die **1** geschikt zijn bevinden zich op de middelste vier 'parkeerstrookjes' zoals in onderstaande schets weergegeven. U heeft aangegeven de ondergrondse kabel op een parkeerplaats linksboven onderstaande figuur te willen plaatsen. Wij hebben onze kabel- en kabeltrunk dimensionering op de afstanden van de laadstations tot deze plaats).

Uitvoeren van lokale laadstations op terrein van Klant, via 2D plattegrond met Google Maps of ander soort

3. BEHEER VAN UW LAADPLEIN
Altijd verbonden, altijd slim laden

Door uw laadplein slim te behouden heeft u meer uit uw laadvoorzieningen. Wij voorzien uw laadplein van software, ook wel het backoffice-systeem genoemd, waarmee we slim laden oplossingen kunnen toepassen en u inzicht geven in het verbruik en de prestaties van uw laadplein. Bovendien helpt dit systeem ons om u op afstand te ondersteunen in het geval van storingen.

Onder ons backoffice beheer vallen de volgende diensten:

- **Slim laden:** het spelen van het beschikbare vermogen van uw elektriciteitsaansluiting over de actief bezette laadstations door toepassing van **load balancing**;
- **Monitoring:** een overzicht van het gebruik van de laadstations, laadpassen en de medewerkers;
- **Administratie en afrekening:** de mogelijkheid om laadkosten te factureren aan verschillende type gebruikersgroepen (bezoekers, werknemers, etc.) waarbij alle gangbare laadpassen worden geaccepteerd. De gepubliceerde informatie van laadstations met laadkosten wordt jaarlijks met u vermeld. Voor het verrekenen van de laadtransacties is een tarief van 20ct/kWh of 10ct/transactie van toepassing;
- **Data gestuurd:** advies krijgen over het bijplaatsen van laadstations wanneer de data laat zien dat dit nodig is;
- **Rapportage:** laadhistorie in bezetting en verbruik van het laadplein met onder meer inzicht in de gemiddelde laadingsgraad, het totale verbruik en de gemiddelde weerstand;
- **Connectiviteit:** wanneer u een storing bij ons meldt kunnen wij mee kijken naar de status van uw laadstation en de storing op afstand verhelpen;
- **Eventueel:** Publicatie van laadstations zichtbaar maken voor externen op verschillende applicaties zodat zij gebruik kunnen maken van uw laadplein en u extra inkomsten kunt genereren.

4. UW INVESTERING

Hieronder vindt u de aanbestedingsbedragen voor zowel de eenmalige investering in de levering en installatie van uw laadvoorzieningen als de jaarlijkse kosten voor het beheer en onderhoud van uw laadplein. **Om transparant te zijn over de samenstelling van onze offerte hebben wij een open begroting opgevoerd in de bijlage van deze offerte.**

Eenmalige kosten voor de levering en installatie van **laadvoorziening op uw project**

De totaalprijs voor de installatie bedraagt exclusief BTW € **X₁**

Jaarlijkse kosten voor het beheer en onderhoud van uw laadplein

De prijs voor backoffice abonnement en service onderhoud bedraagt exclusief BTW € **X₂**

De investering in de levering en installatie van uw laadvoorzieningen worden gefactureerd volgens het schema dat in artikel 5 genoemd staat. De jaarlijkse kosten voor het beheer en onderhoud van uw laadplein worden jaarlijks gefactureerd.

Figure 19: Examples from the main offer template

These documents were read thoroughly and used to create an overview of possible parameters. The goal of identifying parameters is to standardise them in the proposal framework. Therefore, something is a possible parameter if it is not yet standardised. To identify these subjects, the following guidelines were used to analyse the proposal documents:

- Information that needs to be adjusted before being sent to a customer
- Subject that is mentioned in multiple communication channels
- Subject that requires input from the customer
- Explanation of phases in specific project

This analysis led to an overview of subjects in the current proposal that can be tailored and parameterised, as shown in Figure 20.

| Document | Needs to be adjusted | Mentioned often | Requires customer input | Explanation of project phase |
|-------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------|
| Main offer template | <ul style="list-style-type: none"> • Contact person • Project scope • Date • Equans location • Customer location • Number of CPs • CPs in storage • Hardware brand • Including calculation • Total costs installation • Total costs software implementation • Duration of guarantee | <ul style="list-style-type: none"> • Equans' core values • Service within proposition • Disclaimers • Standard yearly costs per CP • Standard software • Terms and conditions • Safety measures • Sustainability • Permission for reference | <ul style="list-style-type: none"> • Picture from customer location • Customer logo • Specification of desired hardware • Permission to publish collaboration • Agreement on the offer | <ul style="list-style-type: none"> • Agreements in first viewing • Testing energy supply |
| Calculation template | <ul style="list-style-type: none"> • Company name • Market prices prediction per quarter • Administration costs • % of times driver needs to charge • kWh per charging session • Total demand • Number of CPs | <ul style="list-style-type: none"> • General price build-up • General volume prognosis | <ul style="list-style-type: none"> • Energy volume • Percentage of electric cars in fleet • Average amount of cars per day | <ul style="list-style-type: none"> • Yearly indexation |
| Final offer to customer | <ul style="list-style-type: none"> • Future vision with customer • Measurements • Taking over current CPs • In-line parking • Fire safety • Quality controls • Contact • Planning | <ul style="list-style-type: none"> • Equans' USPs • Unburdening services • Communication with equans • In-house engineering • Smart charging | <ul style="list-style-type: none"> • Temporary design • Price calculation • Floor plan | <ul style="list-style-type: none"> • Design • Realisation • Exploitation • Kick-off date |

Figure 20: Subjects that can be tailored in proposal documents

This overview shows a great variety of aspects that need tailoring before a document can be shared with a customer, highlighting the possible added value of standardisation. Through clustering a comprehensive list of possible parameters is created:

- Assigned contact persons
- Duration of project phases
- Explanation of project phases
- Location visualisation
- Hardware details
- Explanation of installation costs
- Explanation of charging costs
- Volume prognosis
- Terms and conditions
- Equans' USPs
- Safety measures
- Explanation of software
- Explanation of services

Some of these parameters have to be calculated and adjusted specifically to fit a customers needs. These parameters do not fit in this project's scope, as these involve changing the concrete proposition a customer is offered. On the other hand, several parameters involve the same general information on Equans and the proposition, but are explained differently in each document. These parameters fit within the scope:

- Explanation of project phases
- Explanation of installation costs
- Explanation of service costs
- Terms and conditions
- Equans' USPs
- Explanation of software
- Explanation of services

To further identify possible parameters within the proposal, public communication channels were analysed. As explained in the introduction, the proposal is a dynamic concept that involves ways of communicating the proposition to possible customers. Therefore, public communication channels were also analysed, as possible customers can reach these before the commercial acquisition process is initiated. Communication channels were analysed by looking for:

- The intended reader
- The amount of information given
- Where customers are led when trying to get in contact with Equans

Figure 21 shows differences in tone of voice, intended reader, the extent of information, and the possibility of getting in contact with Equans in the following communication channels:

- General e-mobility website
- Charging instruction website
- Information websites for pilots and technical innovations
- The website behind QR codes on public CPs
- The public complaint form

Equans e-mobility website



- Customer is addressed as an organisation
- Shared website for B2B and B2G
- Personal Tone of Voice

Charging instruction website



- Professional Tone of Voice
- Visual and textual information

Pilot information website



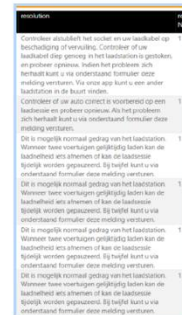
- Mixed personal and professional Tone of Voice
- Extensive textual explanation
- Sent through multiple websites before getting in touch

Website behind public QR code



- Professional Tone of Voice
- Sent through multiple websites to get to information

Public complaint form



- Professional Tone of Voice
- Sent through a form on the general website

Figure 21: Public communication channels

The overview in Figure 21 shows that current communication channels are inconsistent in Tone of Voice, extent of given information, intended reader, routes to get in touch and use of visualisations. The differences within these subjects suggest the scale that can be used when parameterising them.

Conclusion

Without changing the actual proposition, the proposal surrounding it can be changed. These possible changes can be done on an extensive list of subjects that are currently adjusted for each customer, type of document, and communication channel. Not all subjects can be generalised as a parameter, as they require input from or calculations for a specific customer. Subjects that can be parameterised are:

- Explanation of project phases
- Explanation of installation costs
- Explanation of service costs
- Terms and conditions
- Equans' USPs
- Explanation of software
- Explanation of services
- Tone of voice
- Intended reader
- Possibilities to contact Equans
- Amount of documents and communication channels involved

2.4.7 Conclusion internal context analysis

With all sub-questions answered, the main question "How to develop Equans' proposal?" can be answered. The internal analysis has uncovered several opportunities to use in the development of the proposal framework and market entry strategy that will be created in this project. The most important opportunities are the following:

- Within the B2B acquisition process there is a need for standardisation of documents and communication
- As the B2B team will grow in employees, revenue and market shares a strategy that sets them apart from competitors is needed
- For lead generation a pull strategy is desired in addition to the current push strategy. This could be achieved through incorporation of passive, mass communication channels and expansion of the company network
- Parts of the proposal can be parametrised and used in a framework for a proposal tailored towards new market segments

2.5 Competitive Environment Analysis

2.5.1 Introduction and Methods

After the internal analysis was conducted, the competitive environment was researched. The main research question for this area is “How to differentiate from the competitive environment?”. The competitive environment involves the broader context surrounding the corporate real estate and B2B e-mobility market, outside of Equans e-mobility. When aware of this context, Equans can position themselves to differentiate from competitors. To answer the overarching question and get a complete image of this environment, the following sub-questions were formulated:

- What factors drive the developments in commercial real estate?
- Who are Equans’ competitors?
- How do competitors brand themselves?
- What customer segments do competitors target?

The following methods and sources were used within this research area:

- Literature research on market developments in real estate, legislation, positioning, and sustainable development.
- Desk research on CPOs in the B2B market.
- Semi-structured interviews with internal and external experts on real estate and legislation, specified in Figure 22.
- Observations from Provada 2024, the biggest Dutch trade fair for real estate (Appendix B).
- Creating Brand DNAs (Raposo et al., 2020).
- Observations from team meetings and customer negotiations.

| Semi-structured internal interviews | | | |
|-------------------------------------|--------------------------------|-----------------------------|------------------------------------------------------|
| Company | Role | Expertise | Contribution |
| Equans e-mobility | Business developer real estate | Real estate lead generation | B2B acquisition process, desired lead generation |
| Equans e-mobility | Lobbyist | B2G legislation | Legislative development, interactions in legislation |
| Equans e-mobility | Director B2B | (B2B) Strategy development | General strategy for B2B, differentiation from B2T |
| Equans e-mobility | Manager B2B | B2B business development | Differentiation from B2T, general needs B2B |

| Semi-structured Expert interviews | | | |
|-----------------------------------|-------------------------------------------|------------------------------------------------------|---------------------------------------------------------|
| Company | Role | Expertise | Contribution |
| TU Delft | Prof. Management of the Built Environment | Urban development law Real Estate financial flows | Stakeholder interactions within real estate |
| Kearney | Principal Utilities | Sustainability drivers Utilities developments | Market developments Validation target market drivers |
| PAS bv | Advisor Planned Economy | Finance for development of the built environment | General real estate development |

Figure 22: Internal and external expert interviews used in this research phase

2.5.2 What factors drive the developments in commercial real estate?

In literature on commercial real estate, e-mobility and sustainable development, legislation is often mentioned. As legislation is part of an international system that covers sustainability and future development in the broadest sense, and it has a significant influence on competitors and customers, it should be treated as a separate contextual influence on this project. An analysis of legislative influences on Equans' competitive environment through interviews with a lobbyist and a real estate advisor, and literature research gave an overview of the most important legal developments regarding e-mobility and real estate.

There are three institutes that dictate legislation on sustainability, e-mobility and the built environment. In Figure 23, these institutes and their main contributions to legislation are shown.

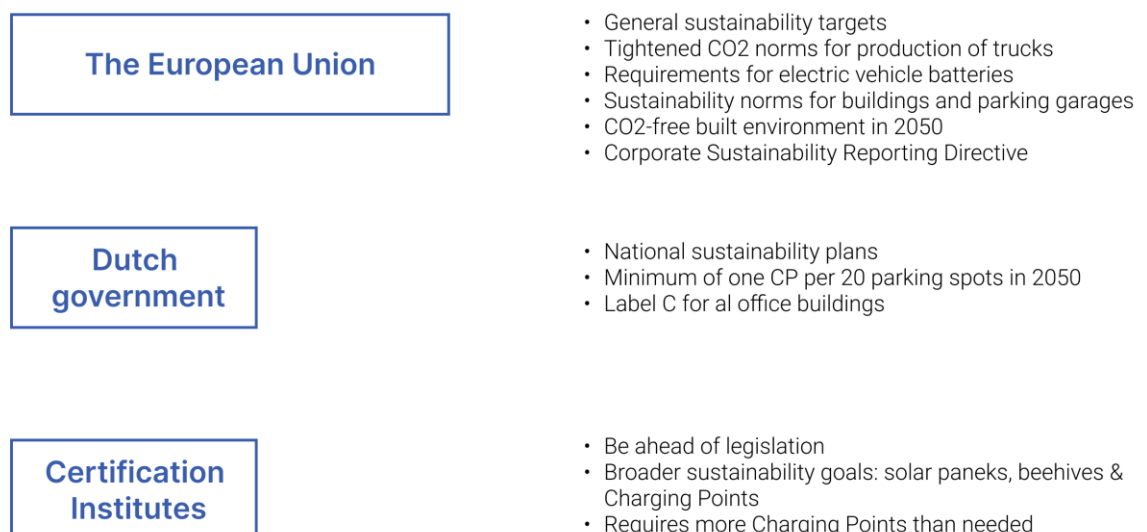


Figure 23: institutes and their main contributions to legislation

Important to notice here are the differences between on one side The European Union and Dutch Government, and Certification institutes on the other.

The European Union (EU) dictates overarching goals and deadlines regarding sustainability (European Commission, 2024). The Dutch Government then interprets these goals and creates legislation. Some of the most impactful laws adhering to these institutes consist of a CO2-free built environment in 2050, a restriction on selling combustion engine cars in 2030, and an obligation of at least one CP per twenty parking spots in 2050. (ECER, 2024; European Commission, 2024; RVO, 2021; RVO, 2024; TKI, 2021; Transport en Logistiek Nederland, 2024). As a lobbyist explains, input from the sector legislation applies to is required before a law can be formed definitely (Appendix P). In a way, this means real estate

and e-mobility companies influence the regulations dictated to them, as long as they reach the long-term goals set by the EU.

Certification institutes are not official legislative institutes. However, in interviews with a Professor in Management of the Built Environment and an advisor on the planned economy, they were mentioned as important trends within commercial real estate (Appendix O). Obtaining a sustainability certification means being ahead of legislation. This is a way of ensuring long-term value retention of a building. As they are not official legislative institutes, they are more heavily influenced by market needs and trends than official legislation, as shown in Figure 24.

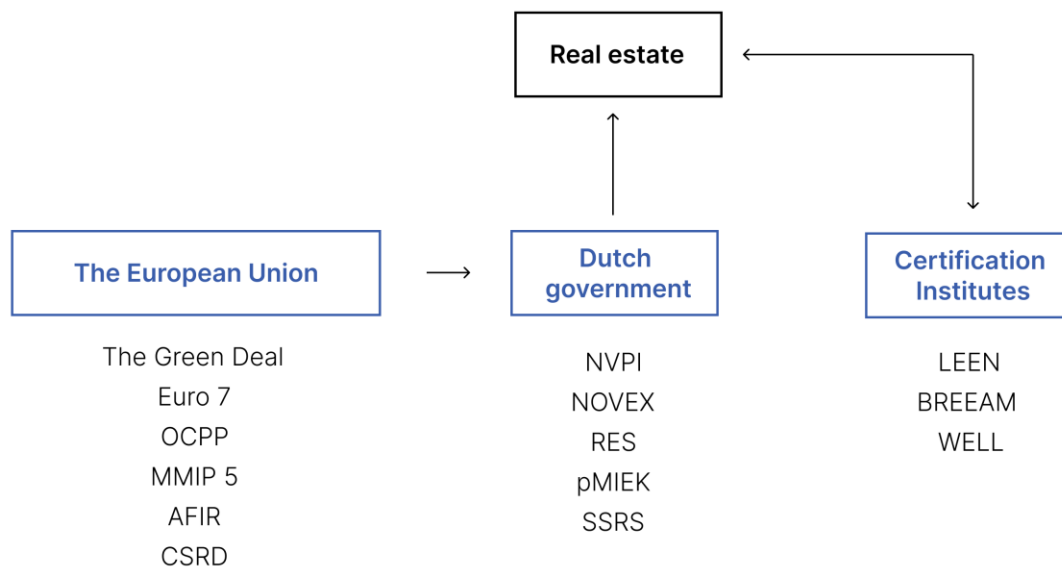


Figure 24: Legislative institutes, interactions and laws connected to them

Observations at the Provada fair, the largest real estate fair in The Netherlands, and an interview with an expert in Utilities give more insight into legislation's influence on commercial real estate (Appendix B). Sustainability and legislation regarding it are often mentioned as if they are a trend rather than an obligation. This makes sustainability an asset that is 'nice to have' for long-term value retention of a building. At trade fairs, this is called the 'Paris Proof' trend, referring to the Paris Agreement (United Nations, 2015).

These observations regarding long-term value retention are also prone outside of legislation. When talking with experts and possible customers at a trade fair the conversation is always led to return on investment (Appendix B, N). The interview with a Professor in Management of the Built Environment uncovered that revenue streams in commercial real estate development are very high, as are the margins and, therefore, financial risk. When value retention is not guaranteed developers and owners cannot justify investments at the scale of real estate, often making investments in sustainable innovation like charging infrastructure not a priority (Appendix O).

Conclusion

Developments in commercial real estate are broadly driven by two main factors: legislation and return on investment. All innovations that require investment need to have a guaranteed positive return on investment before they are viewed as desired improvements. Legislation forces the acceleration of sustainable development, making it an essential aspect of value retention. E-mobility can help adhere to certifications and legislation by facilitating sustainable mobility and smartly managing its required energy usage within a building.

2.5.3 Who are Equans' competitors?

Within the B2G market, Equans' competitors are clear. Shell Recharge, total Energies, Eneco, Vattenfall and Allego often compete with Equans in public tenders. It is significantly more challenging to provide a comprehensive list of competitors in the B2B market. Internal interviews and observations from previous B2B negotiations with potential customers show that all CPOs active in B2G have also entered the B2B market (Appendix P). However, since this market is at the beginning of significant expected growth, it forms an interesting target for other parties as well (Appendix M). Also, because the projects within corporate real estate are often smaller than B2G projects, fewer resources are needed to enter this market. This means new players become competitors for Equans. Observations from Provada, negotiations with possible customers and team meetings, and desk research further reinforce the wide range of new competitors (Eneco eMobility, n.d.; 101Media, n.d.; About PowerGo, n.d.; Elektrisch opladen, n.d.; Allego, n.d.; Laden op het werk, n.d.; Van der Sijs, n.d.; We Drive Solar, n.d.; Welkom bij Revolt, n.d.; Zorgeloos elektrisch rijden, n.d.). A list of competitors was composed as follows:

- Eneco
- We Drive Solar
- Shell Recharge
- Vattenfall
- Van Kessel
- ReVolt
- PowerGo
- vanderSijs
- Allego
- Total Energies

Conclusion

Research into parties mentioned in observations and interviews has resulted in a list of competitors in the B2B AC charging landscape. They differ greatly in size, and their credibility as new players in the B2B market is difficult to check.

2.5.4 How do competitors brand themselves?

Through desk research on B2B competitors, an overview of competitors' branding outings and general propositions is composed in an overview of Brand DNAs, as seen in Figure 25 (Beverland., 2021; Raposo et al., 2020). These can also be seen in Appendix C.



Figure 25: Overview of competitors' Brand DNAs

From this overview, the overarching tone of voice and approach to customers in the corporate AC charging sub-market can be derived. Terms frequently mentioned as personality traits are 'technical', 'professional', and 'pioneering'. Equans fits within this personality, which adds to their credibility within the market but does make it difficult to differentiate from competitors.

To differentiate their position as market leader in the public AC charging market can be used to improve their credibility when entering a new market. To differentiate from the general business-oriented, sleek communication, Equans can incorporate their internal qualities of sincerity, enthusiasm and in-house expertise in external communication.

The positioning aspects of these brand DNAs also show overlap. Unburdening, tailored product sizes and 'solutions for everyone' are frequently mentioned. This makes it difficult to make reliable estimations of the project sizes and market shares related to each party. Equans could emphasize their capabilities to create customised solutions for more complicated projects. Instead of a 'solution for everyone', they are able to take on projects that require more expertise.

Conclusion

By analysing competitors' brands, a general overview of proposals in the corporate AC charging market was created. This shows that Equans e-mobility's current proposal fits very well within this sub-market. However, this does show that Equans could differentiate more from competitors through branding.

2.5.5 What sub-markets do competitors target?

Desk research into competitor's websites gives an insight into what they offer, shown in Figure 26 (Eneco eMobility, n.d.; 101Media, n.d.; About PowerGo, n.d.; Elektrisch opladen, n.d.; Allego, n.d.; Laden op het werk, n.d.; Van der Sijs, n.d.; We Drive Solar, n.d.; Welkom bij Revolt, n.d.; Zorgeloos elektrisch rijden, n.d.).

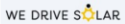






| | eMSP | AC exploitation | DC exploitation | AC turnkey | DC turnkey | AC public | Private | Additional service |
|-----------------------------------------------------------------------------------|------|-----------------|-----------------|------------|------------|-----------|---------|--------------------|
|  | ■ | ■ | ■ | ■ | ■ | ■ | ■ | ■ |
|  | ■ | ■ | ■ | ■ | ■ | ■ | ■ | ■ |
|  | ■ | ■ | ■ | ■ | ■ | ■ | ■ | ■ |
|  | ■ | ■ | ■ | ■ | ■ | ■ | ■ | ■ |
|  | ■ | ■ | ■ | ■ | ■ | ■ | ■ | ■ |
|  | ■ | ■ | ■ | ■ | ■ | ■ | ■ | ■ |
|  | ■ | ■ | ■ | ■ | ■ | ■ | ■ | ■ |
|  | ■ | ■ | ■ | ■ | ■ | ■ | ■ | ■ |
|  | ■ | ■ | ■ | ■ | ■ | ■ | ■ | ■ |
|  | ■ | ■ | ■ | ■ | ■ | ■ | ■ | ■ |

Figure 26: Competitors' offerings

In this overview, it is clear some competitors have entirely different offerings than Equans. Some companies are e-Mobility Service Providers (eMSPs). Equans has not incorporated this business model into their strategy, as it differs greatly from their current proposition and expertise. Another business model not involved in Equans' proposition is additional service. Although Equans' USP of being an A-Z CPO involves service and maintenance, they do not offer this separately. However, emphasising their services more could add to their credibility when Equans is compared with competitors who do communicate this as a separate business model. Lastly, there is an important difference between turnkey and exploitation. As explained in the internal analysis, Equans' proposition consists of exploitation contracts, which they do not intend to change.

Conclusion

From their general proposition and tone of voice used to market it sub-markets can be derived. Competitors active in non-private AC exploitation are direct competitors within this project's scope. These are Eneco, Shell Recharge, van Kessel, PowerGo, and Total.

2.5.6 Conclusion Competitive Environment Analysis

The main research question for this area is "How to differentiate from the competitive environment?". Through the analysis of the competitive environment several drivers behind market growth are identified as legislation and return on investment. These drivers summarise what factors can be strategically used in a proposal framework, as they directly adhere to core characteristics of the competitive environment.

Legislation involves general obligations for sustainability. However office buildings especially have to oblige to CO2 emission reduction through energy usage. Regarding e-mobility, legislation also directly applies to the implementation of charging infrastructure related to the built environment (ECER, 2024; European Commission, 2024; RVO, 2021; RVO, 2024; TKI, 2021; Transport en Logistiek Nederland, 2024; United Nation, 2015). These legislative measures force the accelerated implementation of infrastructure in commercial real estate. Additionally, certification institutes like BREEAM, LEED, and WELL accredit points to CPs installed at buildings (duurzaamheidscertificering.nl, 2024). These certifications offer credible long-term value retention for commercial real estate. To stand out in the competitive environment, Equans can emphasise how their infrastructure and software systems help customers adhere to legislation and certifications.

Value retention can be translated as an additional benefit of investing in sustainability through obtaining charging infrastructure. Sustainability trends give extra value to CO2 reduction through infrastructure on top of legal requirements. By being 'Paris Proof' companies market they value sustainability and remain relevant by being future-proof.

Lastly, corporate AC charging offers sales opportunity in the competitive environment. This sub-market has a lower threshold than the established public AC charging sub-market and offers a wide variety of projects. Demand for small systems of CPs and both exploitation and turnkey contracts lets companies with varying business models step into this market. By emphasizing Equans' credibility as market leader in public AC charging and in-house expertise lets them stand-out from this landscape of small-scale, new competitors.

2.6 Target Market Analysis

2.6.1 Introduction and Methods

By analysing the target market, the e-mobility market will be viewed from the perspective of possible customers in commercial real estate. This question is formulated as “How to tailor Equans’ proposal to customer needs”. The following sub-questions are formulated to find an answer to this question:

- Who are possible customers?
- What information is needed from customers
- What are customer’s motivations to obtain charging infrastructure?
- What market segments can be identified?
- Which market segment offers a strategic opportunity?
- What are customer needs within a market segment?
- What customer needs align with Equans’ values?

To answer the sub-questions in this research area, the following methods and sources were used:

- Reading internal documents currently used in Equans’ proposal, specified in Figure 27
- Semi-structured interviews with internal experts, external experts, and customers, specified in Figure 28.
- Literature research on customer needs-based strategy development and market segmentation.
- Clustering codes from customer interviews in Atlas and Excel.

Internal documents used in current proposal

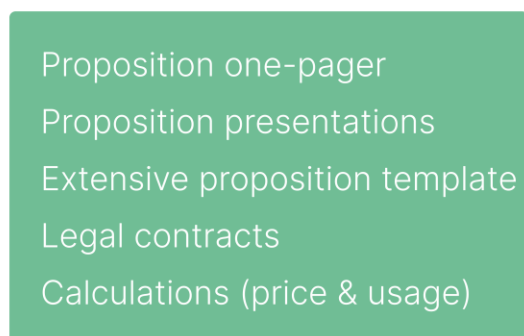


Figure 27: Internal documents used in current proposal

| Semi-structured customer interviews | | | |
|-------------------------------------|------------------------------|----------------------------------------------|------------------------------|
| Company | Stakeholder type | Function in company | Working with Equans? |
| Equity Estate | Service provider Investor | Asset manager | No, chose other CPO |
| Danone | Renter | Facilities manager Sustainability manager | Yes, in exploitation |
| Mileway | Real estate manager | Sustainability manager Asset manager | Negotiating with owner |
| Schep vastgoed /AMVEST | Real estate manager | Technical manager | Yes, in exploitation |
| KPMG | Renter Service provider | Service manager | Yes, not yet in exploitation |
| Kearney | Renter | Office manager Mobility manager | No, not involved in DMU |
| Unistone | Investor Developer | Operations manager | No, chose other CPO |
| Nivab | Advisor | Director Owner | In negotiation |

| Semi-structured internal interviews | | | |
|-------------------------------------|--------------------------------|-----------------------------|----------------------------------------------------|
| Company | Role | Expertise | Contribution |
| Equans e-mobility | Business developer real estate | Real estate lead generation | B2B acquisition process, desired lead generation |
| Equans e-mobility | Director B2B | (B2B) Strategy development | General strategy for B2B, differentiation from B2T |
| Equans e-mobility | Manager B2B | B2B business development | Differentiation from B2T, general needs B2B |

| Semi-structured Expert interviews | | | |
|-----------------------------------|-------------------------------------------|------------------------------------------------------|---------------------------------------------------------|
| Company | Role | Expertise | Contribution |
| TU Delft | Prof. Management of the Built Environment | Urban development law Real Estate financial flows | Stakeholder interactions within real estate |
| Equans NL | Manager focus market Real Estate | Strategy development | Interview guide funnel Proposal strategy development |
| PAS bv | Advisor Planned Economy | Finance for development of the built environment | General real estate development |

Figure 28: Interviews used in this research area

2.6.2 Who are possible customers?

Equans B2B has an overview of stakeholders within commercial real estate but does not know how they interact or which stakeholders have decision power regarding properties. In Figure 29, these stakeholders are shown.

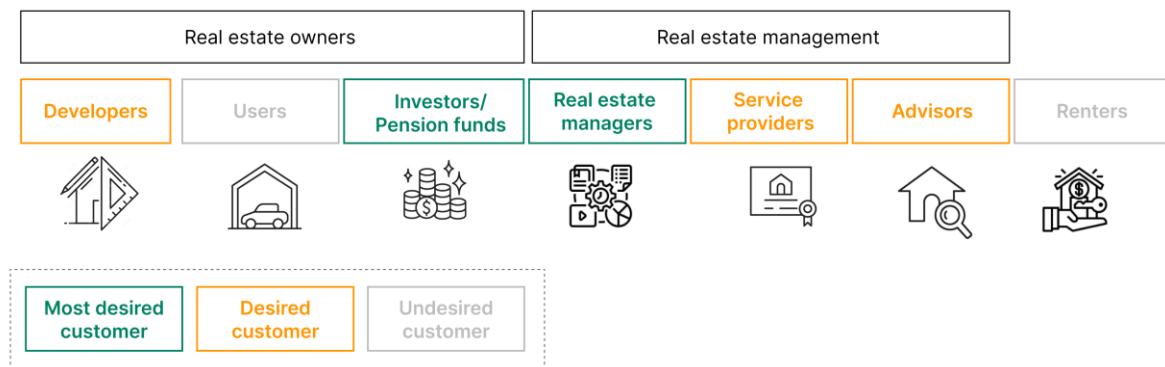


Figure 29: Current commercial real estate stakeholder overview

This overview shows Equans tries to target investors and real estate managers. Renters and users are undesired. These stakeholders consist of companies and employees using the properties owned by investors. In practice, it is difficult to directly reach a property's owner. Also, stakeholders often overlap, as real estate companies often fulfil multiple functions (Appendix O).

Through expert interviews, interactions between stakeholders become clear. In Figure 30, these interactions and the steps within them are shown (Appendix O).

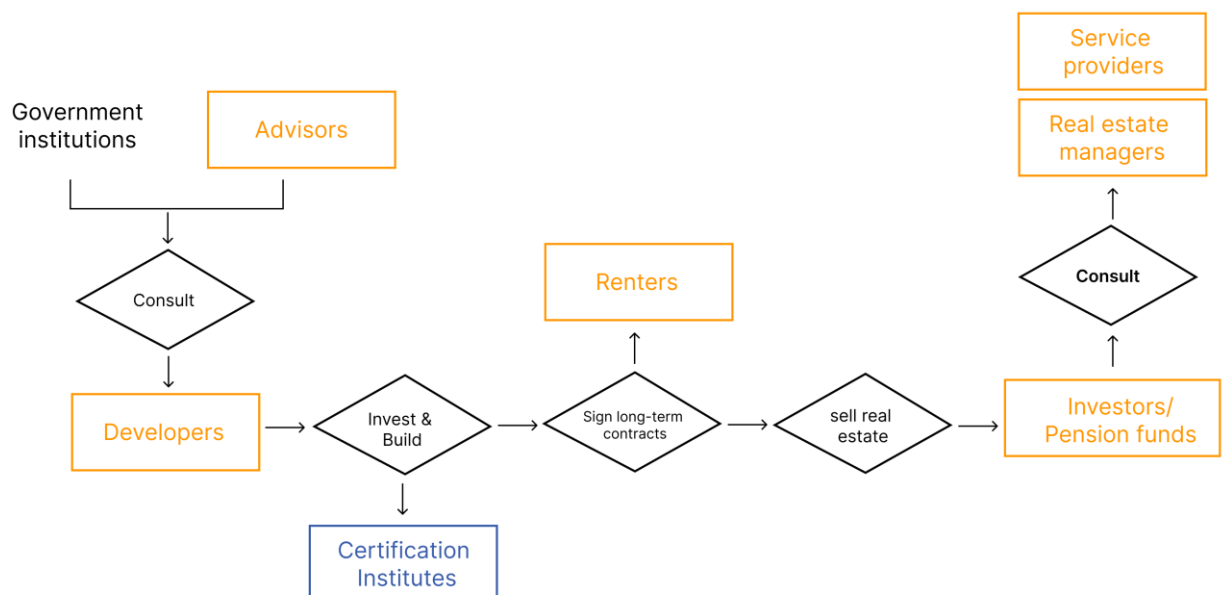


Figure 30: Stakeholder interactions in commercial real estate

This overview gives insight into decision power and financial flow within the development of commercial real estate. The interview with a professor from the Delft University of Technology emphasised the market is driven by legislation and value retention. Investments done by developers involve margins of up to 50 per cent. This makes investing in the development of buildings high-risk but very valuable when properties can prove to be a reliable long-term investment. Because of the high risk, developers highly depend on advisor's advice on what to invest in. Renters and certification institutes have no direct decision power but add value to the development of buildings. If developers can obtain certifications ahead of legislation and sign contracts with renters while developing, long-term value retention is secured. Investors and pension funds officially own a property and have the ultimate decision power, but their only goal is long-term value retention. These stakeholders give real estate managers and service providers the mandate to act as the owner of a building in daily management. Therefore, real estate managers and service providers have higher decision power than initially thought (Appendix O). These interactions reveal underlying stakeholder characteristics, shown in Figure 31.

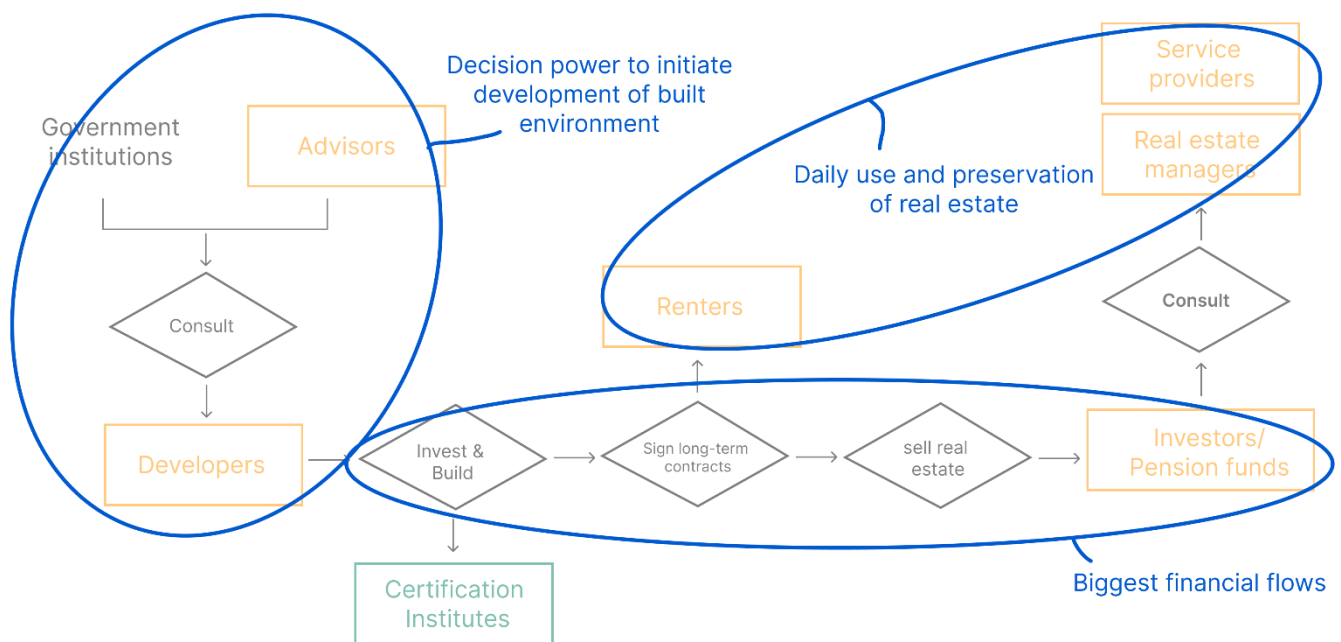


Figure 31: Underlying stakeholder characteristics in commercial real estate

Conclusion

Within commercial real estate, several stakeholders can be identified through their functions. However, companies often have multiple functions, making it unclear who has decision power in the market. When mapping interactions between stakeholders, underlying characteristics are unveiled. These characteristics explain overlap in stakeholder characteristics, through:

- Decision power to initiate development of built environment
- Daily use and preservation of real estate
- Biggest financial flows

When targeting customers, these three characteristics offer more clarity than solely looking for a company's function.

2.6.3 What information is needed from customers?

As the main research question related to the target market research area, "How to tailor Equans' proposal to customer needs?" implies, there is a certain shift in strategy involved in this project. Instead of merely selling a predetermined proposal to customers, the desired customers are used as input to create the proposal. This means it is essential to effectively uncover customer needs related to Equans' proposal.

The stakeholders Equans has currently identified are based entirely on functional classification characteristics. This gives a static image of a market that is actually dynamic in functions and characteristics, as the overlap in functions shows (Hu et al., 2022; Peeters, 2024). Instead of classifying customers based purely on characteristics, it should be done based on knowledge dependent on experience and, therefore, empirical in nature (Bruce, 2007; Casullo et al., 2013). By treating the market as a hedonic model, underlying values and relations across stakeholders can be taken into account (Ekeland et al., 2001).

Equans NL has undergone a similar change in strategy. In 2020, they changed from trying to find customers that matched their propositions to tailoring their propositions towards predetermined desired customer segments. They call these 'focus markets'. Real estate is one of these focus markets; however, as this strategy did not apply to e-mobility, it cannot be used directly in this project. By interviewing the manager of the real estate focus market, interview subjects used to obtain useful information directly from customers can be derived (Appendix O). In order from broad to specific, these subjects are:

- Themes & Trends: Market-wide developments.
- Pains & Gains: Both positive and negative associations with e-mobility.
- DMU: Decision Making Units within possible customers. This subject involves stakeholders involved in deciding on a CPO, process time, and who has decision power.
- Communication channels: What channels are used to get in touch with new parties or preferred ways of communication during the commercial acquisition process.

- Proposal: Specific needs regarding charging infrastructure and collaboration with a CPO.

The subjects described in this analysis will be used as a guide to obtaining knowledge from within the desired target market so it can be used as input for the proposal framework. Essentially, this method reverses the way of operation Equans currently uses. Instead of offering their general USPs towards a diversified portfolio of possible clients, a proposal is formed based on their needs and interests.

Through qualitative interviews based on the subjects in the interview guide, a deeper understanding of current actors, interactions, and values will be obtained (Appendix H). To reduce bias, a variation in the types of stakeholders will be derived. Both parties that collaborate with Equans e-mobility and parties that did not sign a contract will be interviewed. Also, a variety of stakeholder functions will be sought, making sure all three underlying characteristics identified in the previous sub-question are represented. This has resulted in eight interviews, specified in Figure 32.

| Semi-structured customer interviews | | | |
|-------------------------------------|------------------------------|----------------------------------------------|------------------------------|
| Company | Stakeholder type | Function in company | Working with Equans? |
| Equity Estate | Service provider Investor | Asset manager | No, chose other CPO |
| Danone | Renter | Facilities manager Sustainability manager | Yes, in exploitation |
| Mileway | Real estate manager | Sustainability manager Asset manager | Negotiating with owner |
| Schep vastgoed /AMVEST | Real estate manager | Technical manager | Yes, in exploitation |
| KPMG | Renter Service provider | Service manager | Yes, not yet in exploitation |
| Kearney | Renter | Office manager Mobility manager | No, not involved in DMU |
| Unistone | Investor Developer | Operations manager | No, chose other CPO |
| Nivab | Advisor | Director Owner | In negotiation |

Figure 32: List of customer interviews

Conclusion

To structure the extraction of knowledge from stakeholders within corporate AC charging categories are formulated from all sub-questions and contextual knowledge that is already obtained. Starting from the impact of market-wide themes on specific stakeholders can be derived. A step further, the wants and needs of each interviewed stakeholder related to charging infrastructure will be specifically asked. As the results from these interviews form the basis for a proposal framework from Equans, aspects from the internal research will also be translated into interview subjects. On the one hand, leverage points from the beginning of the acquisition process can be questioned through the proposition offer and the channels stakeholders use to get in touch with charging infrastructure parties. On the other hand, leverage points from the final part of the process can be questioned by deriving the Decision-Making Unit (DMU) within a company. This results in the following subjects:

- Themes & Trends
- Pains & Gains
- DMU
- Communication channels
- Proposition

2.6.4 What are customer's motivations to obtain charging infrastructure?

In the previous research question, five subjects were found all interview codes could be ascribed to. Using these subjects, codes from the customer interviews can be clustered into specific customer motivations to obtain charging infrastructure. All interviews were transcribed and coded in Atlas. This has resulted in an extensive overview of codes related to each type of stakeholder and segment from the interview guide, shown in Figure 33 (Appendix S).

Number of codes related to interview subjects

| | Danone | Equity Estate | KPMG | Mileway | Nivab | Kearney | Schep vastgoed /AMVEST | Unistone |
|------------------------|--------|---------------|------|---------|-------|---------|---------------------------|----------|
| Themes & Trends | 50 | 37 | 36 | 23 | 41 | 44 | 21 | 15 |
| Pains & Gains | 19 | 40 | 8 | 23 | 18 | 3 | 19 | 30 |
| DMU | 12 | 33 | 13 | 31 | 27 | 12 | 23 | 15 |
| Communication Channels | 8 | 6 | 3 | 11 | 13 | 2 | 5 | 2 |
| Proposition | 25 | 29 | 27 | 29 | 34 | 8 | 8 | 29 |

Figure 33: Number of codes related to interview subjects

The subjects "Themes & Trends" and "Pains & Gains" refer to codes on market-wide trends, specific needs for charging infrastructure and experiences with CPOs. Therefore, these subjects are related to possible motivations for obtaining charging infrastructure both from market developments and internal motivation within companies. The codes within these two subjects were clustered into possible motivations for obtaining charging infrastructure. Figure 34 shows these motivations.

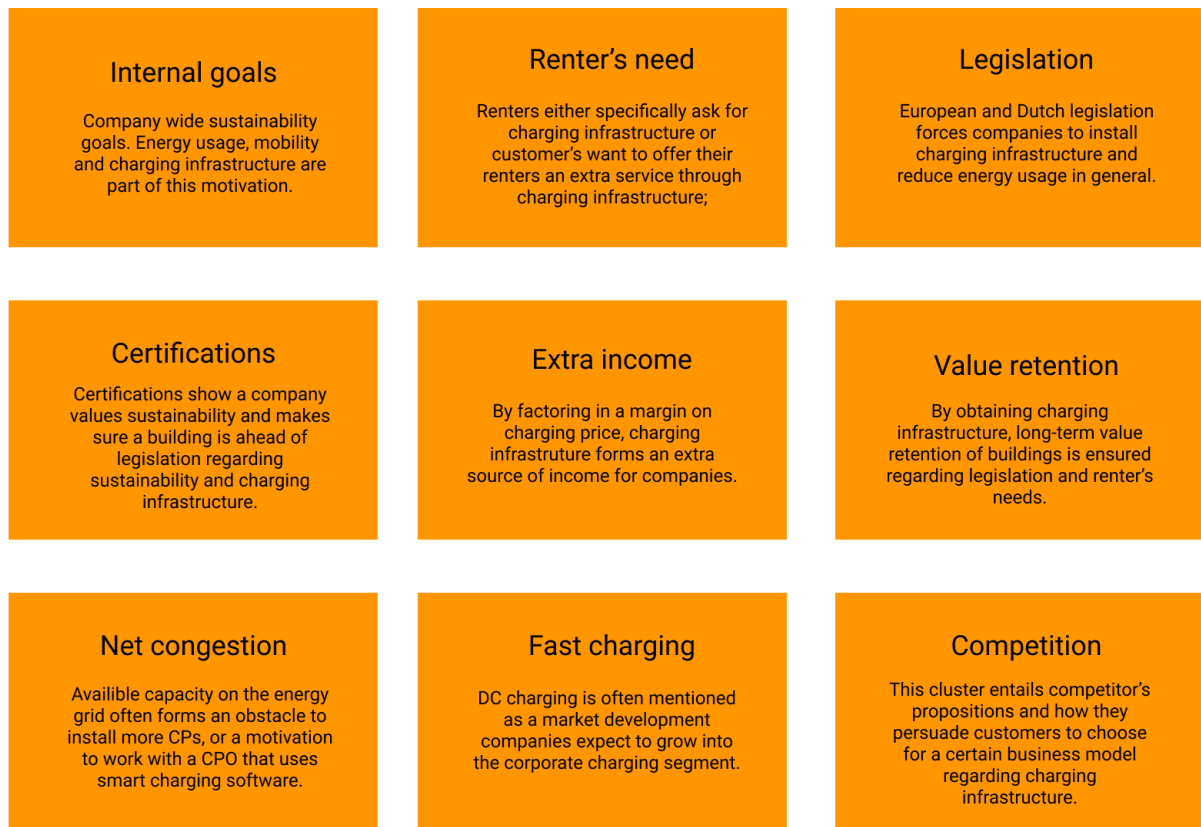


Figure 34: Clusters forming customer's motivations for obtaining charging infrastructure

Not all these motivations are applicable to Equans' proposition. Fast charging will, therefore, not be researched as a motivation Equans can play into within this project.

Conclusion

By clustering codes from customer interviews, several motivations for obtaining charging infrastructure can be identified. In general, these motivations are initiated by either internal or external sources from the perspective of a customer. Internal factors contain sustainability goals and long-term value retention, external factors contain legislation and needs from renters.

2.6.5 What market segments can be identified?

In marketing and sales market segmentation methods are necessary tools for creating effective strategies. Maina (2015) found that products and services that are tailored to suit specific segments of consumers lead to a higher satisfaction for those consumers. Additionally, precisely tailored market segments and products force a more focused way of generating desired revenue (Patterson, 2010). This inherently leads to an increased level of demand of those products and services within the targeted consumer segments (Cascade, 2024; Maina, 2015). When market segments are clearly identified and an accompanying sales strategy is tailored to those segments, a proposition can be tailored to form a competitive benefit within a market (Cascade, 2024; Maina, 2015; Patterson, 2010). When entering a new market, strategically targeting specific market segments is essential to effectively alter a proposition on market segment's needs (Maina, 2015; Hu et al., 2022). This is in essence the goal of the company in general: satisfying customer needs while making a profit (Camilleri, 2018).

Especially in commercial real estate market segmentation forms a challenge. This market is known for complicated dynamics among stakeholders and implicit underlying values (Hu et al., 2022). Real estate can be seen as an investment, critical asset or embodiment of a company's image, depending on different stakeholders' perspectives. In order to effectively enter the market of commercial real estate it should be assorted into clear market segments that consider underlying values and needs.

Equans' current market segmentation within commercial real estate is based purely on functional characteristics of stakeholders (Hu et al., 2022). Like consulting, investing in turn-key real estate, managing properties, et cetera. However, a company can cover multiple functions. This creates a 'grey area' where one party can be placed in multiple market segments. This hinders Equans from strategically entering the real estate market, as they cannot extract customer's underlying needs and willingness to pay from undefined segments (Hu et al., 2022).

As found through an expert interview, different stakeholders in the commercial real estate market can be mapped based on interactions between them (Appendix O). This led to the overview of interactions and underlying stakeholder characteristics and interactions that were used to create market segments between which there is no overlap in financial power, decision-making power and stakeholder characteristics. Figure 35 shows these segments.

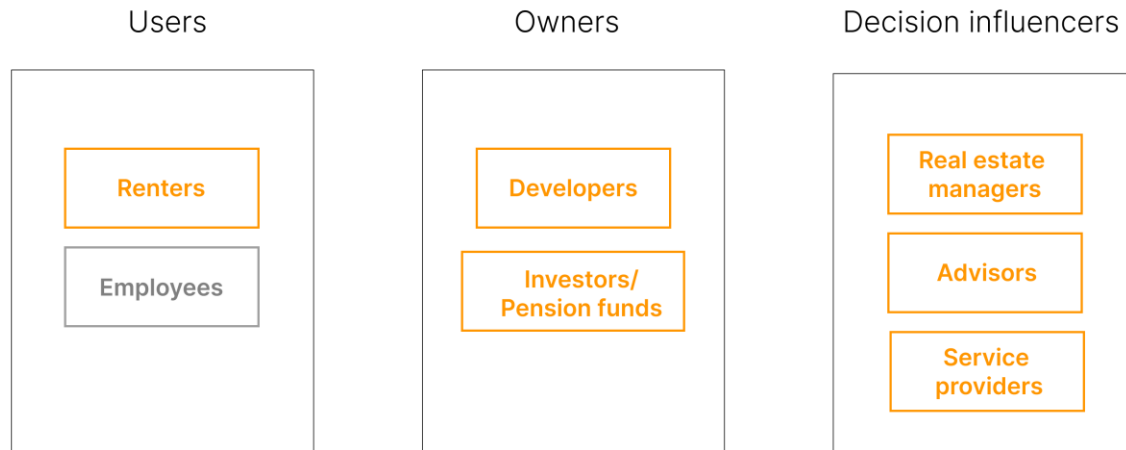


Figure 35: Newly defined market segments within commercial real estate

Conclusion

Using methods found through literature, stakeholders within commercial real estate can be divided into homogeneous market segments. These segments are based on communication and underlying characteristics, such as financial power, decision making power and knowledge on charging infrastructure. The market segments are formulated as Users, Owners, and Decision influencers.

2.6.6 Which market segment offers strategic opportunity?

The previous research question led to the creation of three new market segments within commercial real estate; Users, Owners, and Decision influencers.

The stakeholders within these three market segments have different levels of knowledge on charging infrastructure, technical resources, and needs and motivations to obtain charging infrastructure.

Internal interviews unveil the current B2B strategy entails targeting owners of properties (Appendix P). However, these newly defined segments expose that their involvement within the internal DMU is less than previously assumed. Decision influencers have the highest involvement in the final decision on which CPO to work with, but users form the source of validation of the CPO's service. Additionally, user's needs are a direct motivation to obtain charging infrastructure, as found through the research question "What are customer's motivations to obtain charging infrastructure?". Therefore, only users and decision influencers form the basis of further design iterations within this project.

Conclusion

The market segments defined in the target market analysis offer a new strategic direction within the B2B team. To play into customers' motivations for obtaining charging infrastructure and adhere to stakeholders involved in the DMU for choosing a CPO, Equans should change their proposition to fit the Users' and Decision influencers' needs instead of the Owner's needs.

2.6.7 What are customer needs within a segment?

All customer interviews can be ascribed to a market segment these customers fit into, resulting in the overview shown in Figure 36.

| Interviewed market segments | | |
|-----------------------------|------------------------------|---------------------|
| Company | Stakeholder type | Market segment |
| Equity Estate | Service provider Investor | Decision influencer |
| Danone | Renter | User |
| Mileway | Real estate manager | Decision influencer |
| Schep vastgoed /AMVEST | Real estate manager | Decision influencer |
| KPMG | Renter Service provider | User |
| Kearney | Renter | User |
| Unistone | Investor Developer | Owner |
| Nivab | Advisor | Decision influencer |

Figure 36: Interviewed market segments

Using this overview, codes from all customer interviews can be clustered into market segments (Appendix S). Figure 37 shows a wide range of needs regarding charging infrastructure, energy usage and property development, which are all applicable to the installation of charging infrastructure.

| | Users | Owners | Decision influencers |
|-------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Sustainability | <ul style="list-style-type: none"> • Convince importance of Paris Proof to decision influencers • Giving an example of sustainability • Reducing the building's energy usage • Reporting CO2 emissions | <ul style="list-style-type: none"> • Make optimal use of available grid capacity | <ul style="list-style-type: none"> • Use CPs to increase sustainable credibility • Reporting CO2 emissions • Comply with company-wide sustainability goals • Manage grid congestion |
| Legislation | <ul style="list-style-type: none"> • Comply with local legislation | | <ul style="list-style-type: none"> • Adhere to national legislation |
| Certifications | | | <ul style="list-style-type: none"> • Obtain certifications |
| Pricing | <ul style="list-style-type: none"> • Pay an honest price for charging | <ul style="list-style-type: none"> • Avoid big investments | <ul style="list-style-type: none"> • Gain extra income from CPs |
| Reliability | <ul style="list-style-type: none"> • Have safe CPs in parking garages • Comply with fire safety regulations • Have as little malfunctions as possible | <ul style="list-style-type: none"> • Have reliable CPs | <ul style="list-style-type: none"> • Have as little malfunctions as possible • Avoid risk through investments |
| Employee benefits | <ul style="list-style-type: none"> • Offer enough CPs to employees without private CPS • Lowering the threshold for private electric driving • Offer enough parking spots to employees • Offer spacious charging spots to employees | | <ul style="list-style-type: none"> • Fulfill user's needs • Let renters install the CPs they need • Attract new renters |
| Technology | <ul style="list-style-type: none"> • Offer the newest technology to employees • Making charging as easy as possible • Make efficient use of existing CPs • Stay up to date on e-mobility knowledge | <ul style="list-style-type: none"> • Install DC chargers | <ul style="list-style-type: none"> • Make sure energy usage is managed within a building • Have one platform for managing property energy usage |
| Sales process | | <ul style="list-style-type: none"> • Let other parties manage properties • Short sales processes | <ul style="list-style-type: none"> • Let other parties manage CPs • Sell properties without conflicting contracts • Ensure value retention |

Figure 37: Needs per market segment

Although several needs overlap between market segments, there are significant differences between Users and Decision Influencers, as these were found to offer strategic opportunities. Figure 38 shows the most important differences between these two market segments.

| | Users | Decision influencers |
|----------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Drivers | <ul style="list-style-type: none"> • Driven by internal factors <ul style="list-style-type: none"> • Sustainability goals • Employee's mobility | <ul style="list-style-type: none"> • Driven by external factors: <ul style="list-style-type: none"> • Users' needs • Legislation • Value retention for owners |
| Knowledge | <ul style="list-style-type: none"> • Low technical knowledge, but familiar with use of e-mobility technology | <ul style="list-style-type: none"> • High technical knowledge, but low knowledge of e-mobility |
| Exploitation | <ul style="list-style-type: none"> • Often unfamiliar with exploitation contracts | <ul style="list-style-type: none"> • Could be hesitant to sign a long-term exploitation contract, as they need to convince their location's owner |
| CPO | <ul style="list-style-type: none"> • Low knowledge of CPO-role | |
| Locations | <ul style="list-style-type: none"> • Different levels in tailoring of proposal for single-tenant and multi-tenant locations | <ul style="list-style-type: none"> • Often in charge of multiple locations |
| Decision power | <ul style="list-style-type: none"> • Can put pressure on decision makers and owners | <ul style="list-style-type: none"> • High decision power on behalf of owners |
| Values | <ul style="list-style-type: none"> • Value user experience and low price margin | <ul style="list-style-type: none"> • Target oriented customers • Need total unburdening |

Figure 38: Differences between Users and Decision influencers

Conclusion

Different customer needs can be uncovered within the three identified segments, formulated as Users, Owners, and Decision influencers. Users are driven by personal sustainability goals and have low technical knowledge. Sustainable mobility is part of adhering to local legislation and branding themselves as sustainable. Decision influencers are motivated by legislation and to fulfil user's needs. Charging infrastructure is an extra service they can offer along with their properties, but they do not want to make big risky investments to realise it.

2.6.8 What customer needs align with Equans' proposal?

By comparing the extensive list of customer needs found in the previous sub-question with documents related to Equans' proposition, the level at which customer needs are currently being met is identified (Appendix N). Not all customer needs are applicable to Equans' proposition. Some are based on available space for cars, reporting of CO2 emissions of a whole building and contract management. However, several needs are applicable to Equans' current proposition, but are not specifically mentioned in the proposal. Figure 39 shows an overview of customer needs that fully apply to Equans' proposition, but might not be explicitly marketed.

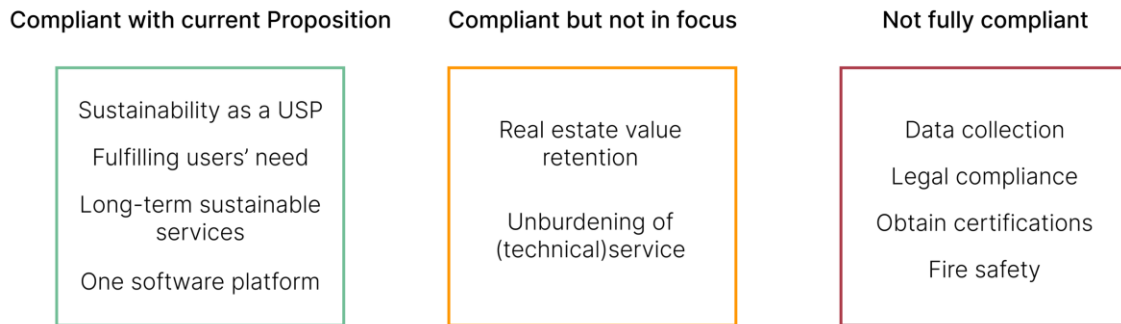


Figure 39: Customer needs applicable to Equans' proposition

Conclusion

Equans could play into customer needs by communicating what general needs can be fulfilled through their proposition. To do so, they merely have to communicate what is already applicable, without changing their core proposition.

2.6.9 Conclusion Target Market Analysis

To conclude the target market analysis, the overarching question can be answered: How to tailor Equans' proposal to customer needs? There are several opportunities for Equans to tailor their proposal towards customer needs. To start, is essential to understand customers motivations to obtain charging infrastructure. This gives an insight into customer's perception on market developments within corporate AC charging. These motivations show a balance between internal sustainability and value retention goals and external pressure from legislation and renter's needs.

To really play into customer needs, Equans can differentiate between market segments. Within a segment, needs, decision power and financial power are homogeneous. This makes changes within the proposal applicable to all stakeholder types within a segment.

2.7 Conclusion Discover Phase

By combining the knowledge gained through all analyses, the main research question can be answered, "How to strategically enter the corporate AC charging market within commercial real estate while leveraging Equans' USPs?".

Answering the sub-questions has led to various parameters that can be used to create a proposal framework:

- Parameters within Equans proposal that can be communicated differently depending on the desired customer
- Market drivers that indicate how corporate AC charging will develop and how Equans' can grow along with these developments
- Customer's motivations for obtaining charging infrastructure, giving insight on customer's perspective on a growing market
- Market segments within corporate AC charging and specific needs from customers within them
- An overview of customer needs that apply to Equans' proposition, but not yet specifically included in the proposal

These parameters will be used to standardise the commercial acquisition process. This standardisation lies in effectively targeting strategically beneficial customers through market segmentation and using generalised communication that leverages Equans' USP that fits the desired customer.



Define

In this phase the results from the discover phase are deducted through a converging process.

3. Define

In this chapter, the results from the research phase will be synthesised to form parameters within the proposal framework created in this project. As mentioned in the project brief, the final goal is to create a framework Equans can use to specify their proposal towards specific market segments. With all findings from the analysis phase, the following parameters need to be specified:

- Parameters within Equans' proposal related to customer needs
- Customer journeys of the process towards obtaining charging infrastructure
- Possible communication channels
 - o Tailored towards customer journeys
 - o Adhering to a developing market entry strategy within Equans B2B

3.1 Parameters within Equans' proposal related to customer needs

As mentioned in the internal analysis, several standard subjects within Equans' B2B proposal that can be altered can be defined as the following:

- Explanation of project phases
- Explanation of installation costs
- Explanation of service costs
- Terms and conditions
- Equans' USPs
- Explanation of software
- Explanation of services
- Tone of voice
- Intended reader
- Possibilities to contact Equans
- Amount of documents and communication channels involved

To further generalise this list, these subjects were clustered into overarching themes, shown in Figure 40.

Standard subjects within proposal

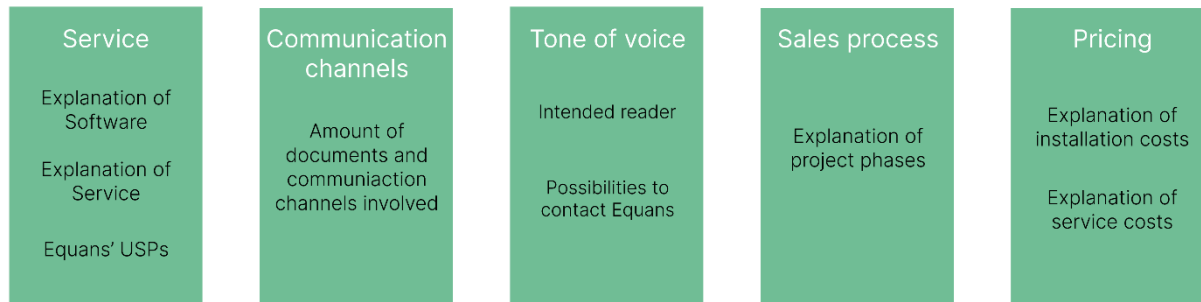


Figure 40: Standard subjects within the B2B proposal

In order to use these subjects as input for the proposal framework they need to be generalised into parameters. All subjects mentioned within the themes currently require specific adjusting, but when comparing them in sub-question 2.4.5 a range can be deducted for each subject. For example, the explanation of service and hardware varies from only explaining Equans takes overall service and software management as an A-Z CPO to extensively explaining how the service technically works. Figure 41 shows parameters involving all subjects mentioned in the themes.

Parameters within proposal

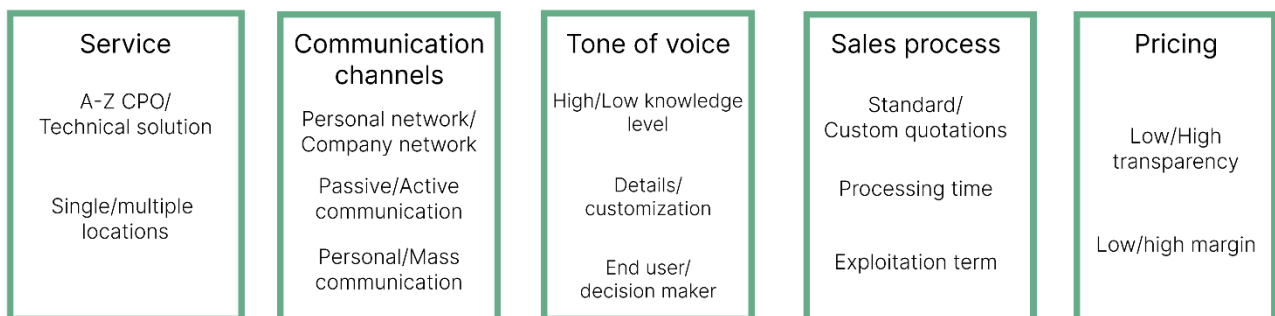


Figure 41: Parameters within the B2B proposal

These parameters can be adjusted to adhere to specific customer needs within a market segment. In the design chapter, these parameters will be used as input for the proposal framework.

3.2 Customer journeys

The customers interviewed in the target market analysis can be classified into the three newly formulated market segments. Figure 42 shows this classification.

| Interviewed market segments | | |
|-----------------------------|------------------------------|---------------------|
| Company | Stakeholder type | Market segment |
| Equity Estate | Service provider Investor | Decision influencer |
| Danone | Renter | User |
| Mileway | Real estate manager | Decision influencer |
| Schep vastgoed /AMVEST | Real estate manager | Decision influencer |
| KPMG | Renter Service provider | User |
| Kearney | Renter | User |
| Unistone | Investor Developer | Owner |
| Nivab | Advisor | Decision influencer |

Figure 42: Interviewed market segments

Now that the market segments these customers belong to are known, data from these segments can be synthesised further. By clustering codes accredited to the customer's DMU and market segment, possible pathways customers need to complete in the process, from wanting charging infrastructure to signing a contract, can be derived. Figure 43 shows all possible pathways derived from codes within the DMU group (Appendix S).

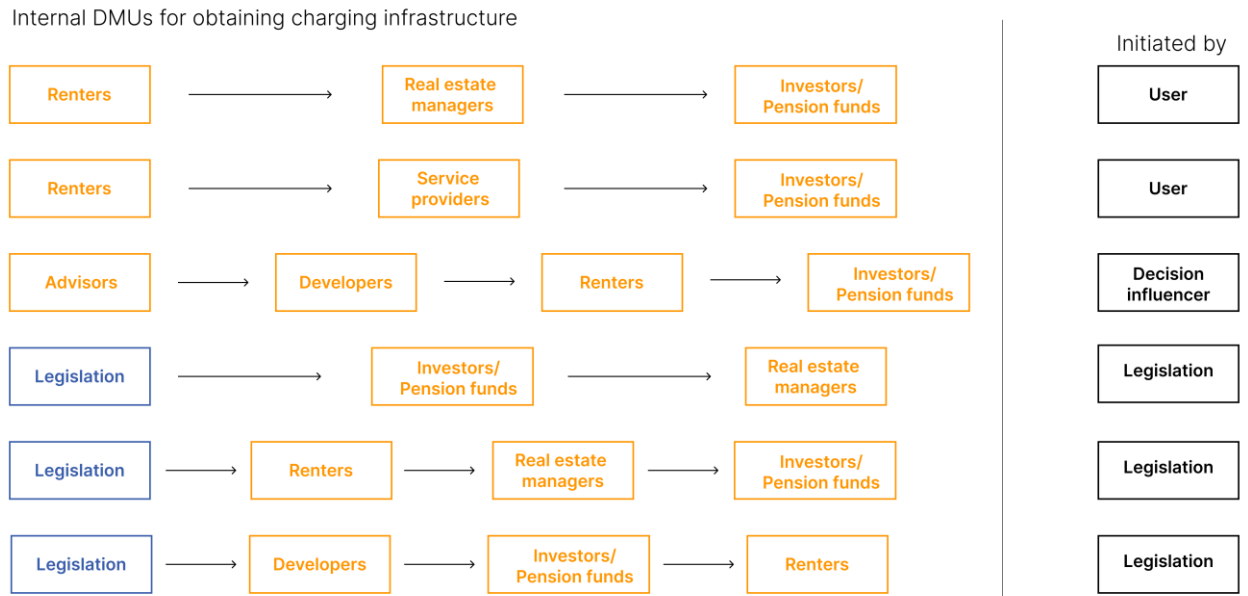


Figure 43: Internal DMUs for obtaining charging infrastructure

As legislation is an external party that Equans B2B cannot directly influence, the pathways initiated by legislation will not be considered in this synthesis. These pathways are touched upon in the recommendations chapter. After a brainstorm session with a manager in the B2B team, these pathways have been reduced to two general pathways, shown in Figure 44 (Appendix E).

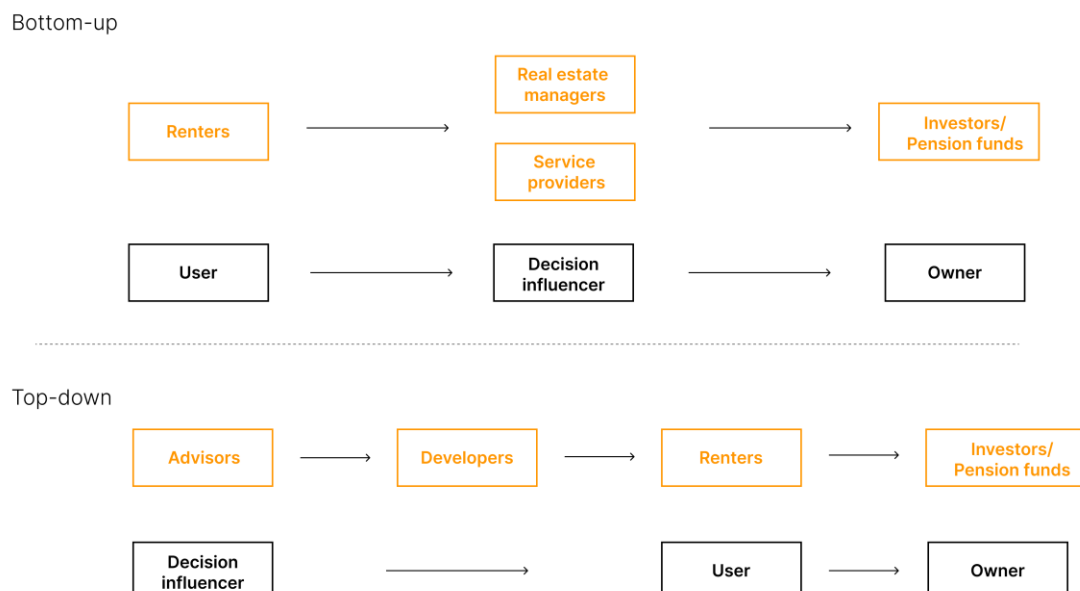


Figure 44: Two general customer pathways

These two pathways imply different motivations for obtaining charging infrastructure, decision-making power, and needs related to Equans' proposal. Both offer strategic opportunities for Equans, as they are initiated by the most promising market segments found in the target market analysis. Detailed customer journeys can be created by clustering codes from the customer interviews related to DMU, Pains & Gains, and Proposition (Appendix S).

Bottom-up customer journey

Users initiate the bottom-up pathway, the market segment with the least financial and decision-making power. Their motivation to begin the search for charging infrastructure usually comes from intrinsic motivation to further improve their sustainability goals. For corporate parties that rent an office, mobility and energy usage typically make up the most significant share of their emissions, as was mentioned in customer interviews (Appendix Q). Battery-powered Electric Vehicles (BEVs) cut back on emissions compared to combustion engine cars, and the controlling software can help balance the energy usage of a building (ElaadNL, 2021). Therefore, charging infrastructure could be a suitable solution for them to help achieve their sustainability goals.

In addition to their motivation to obtain charging infrastructure, users are characterised by a lack of knowledge of e-mobility and technical capabilities to install the infrastructure. As the parties renting buildings do not manage their maintenance and development, they lack the decision-making power and knowledge needed to make changes to these buildings. The knowledge gained through customer interviews, target market analysis and observations from the commercial acquisition process were used to create the bottom-up customer journey shown in Figure 45.

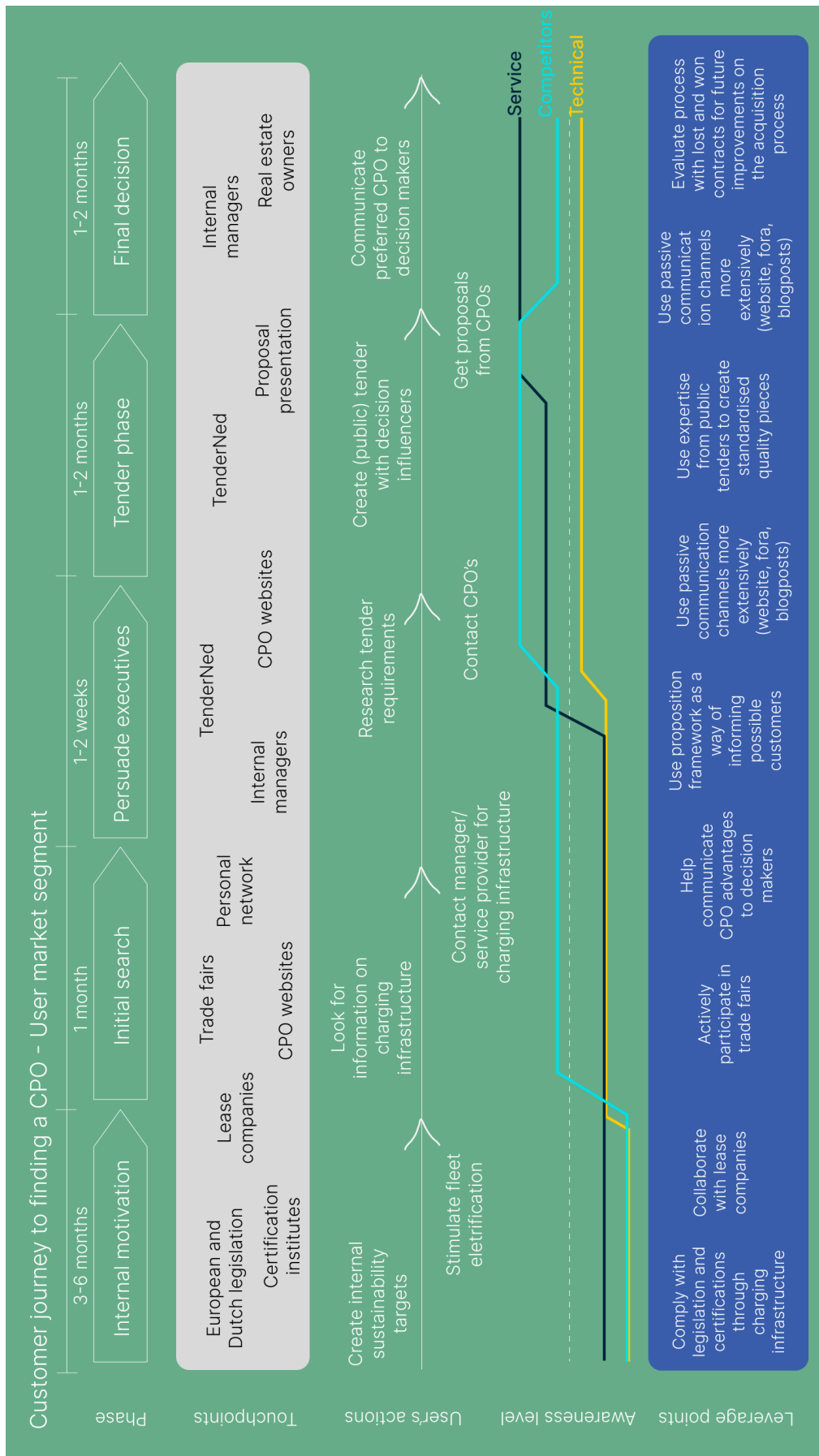


Figure 45: Bottom-up customer journey towards obtaining charging infrastructure

Top-down customer journey

Decision influencers initiate the top-down pathway towards obtaining charging infrastructure; these are parties with high financial and decision-making power within commercial real estate. The motivation to approach a CPO usually comes from legislative or portfolio-wide sustainability targets. Charging infrastructure is either an obligation or a service to fulfil renter's needs. These parties manage, develop or maintain buildings and have high technical knowledge levels and resources. With all developments they initiate, long-term value retention of a building is essential. Therefore, they tend to be critical of required investments. When decision influencers look for a CPO to take care of charging infrastructure as a third party, it can be expected that multiple CPOs will be approached or applied to a public tender, as was mentioned in customer interviews (Appendix Q). This means that differentiation from competitors in technical expertise and pricing is vital within this pathway. Findings gained through customer interviews, target market analysis and observations from the commercial acquisition process were used to create the top-down customer journey shown in Figure 46.

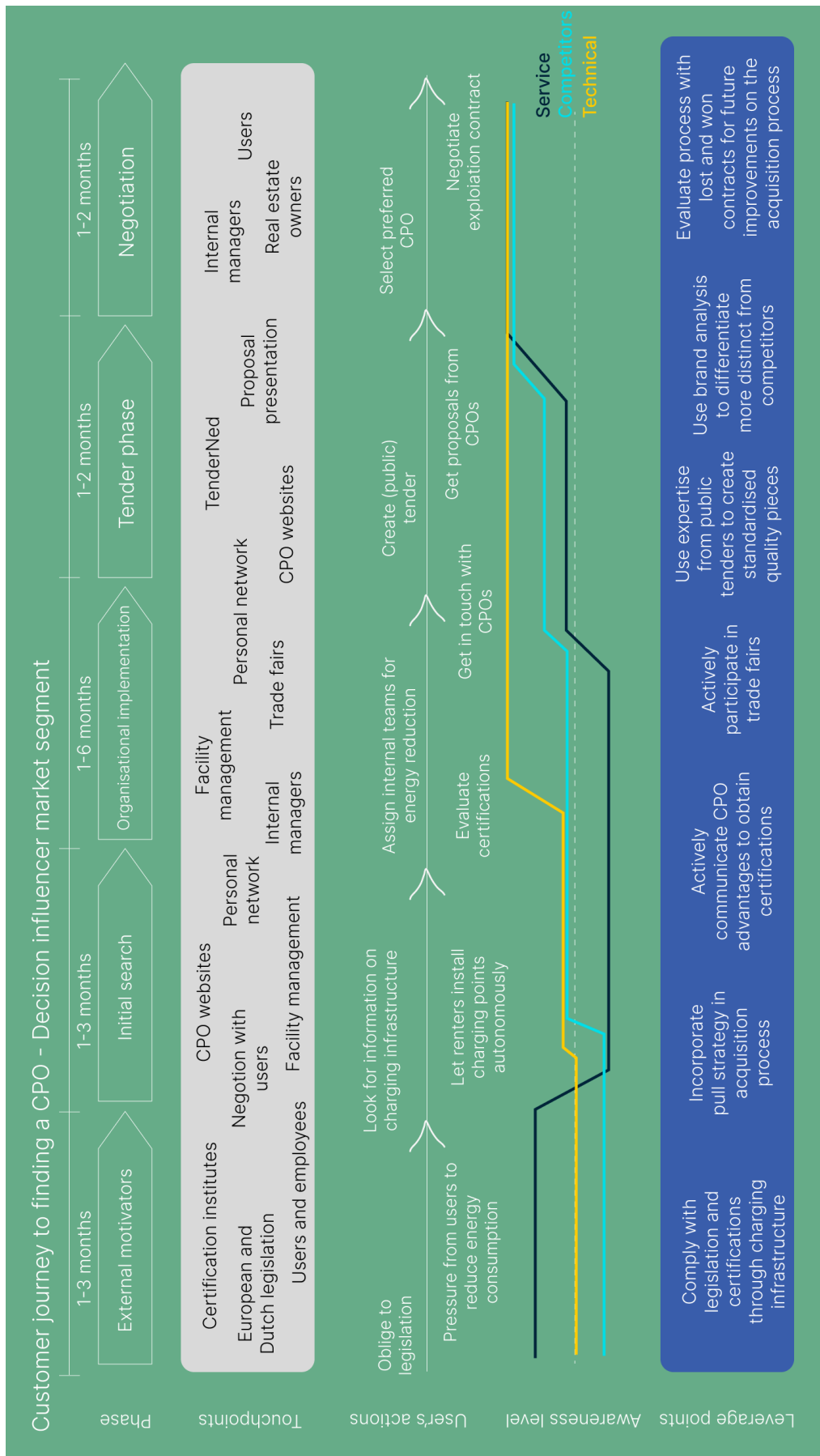


Figure 46: Top-down customer journey towards obtaining charging infrastructure

3.3 Communication channels

As mentioned in the introduction of this chapter, communication channels form a parameter within the proposition framework created in this project. In the internal context analysis, an overview of communication channels and documents currently used by the B2B team was found, shown in Figure 47.

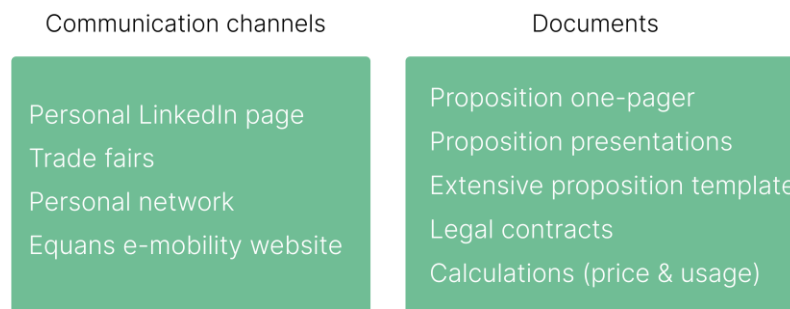


Figure 47: Communication channels and documents in the current proposal

The internal analysis showed Equans is currently operating by a pull strategy, which they wish to expand with a push strategy. The pull strategy entails actively communicating with possible customers. To find alternatives, 'active' and 'passive' are placed on opposite sides of an axis. Also, customer leads in commercial real estate are mostly generated through personal networks. Therefore, 'personal' and 'mass' are placed on opposite sides of an axis.

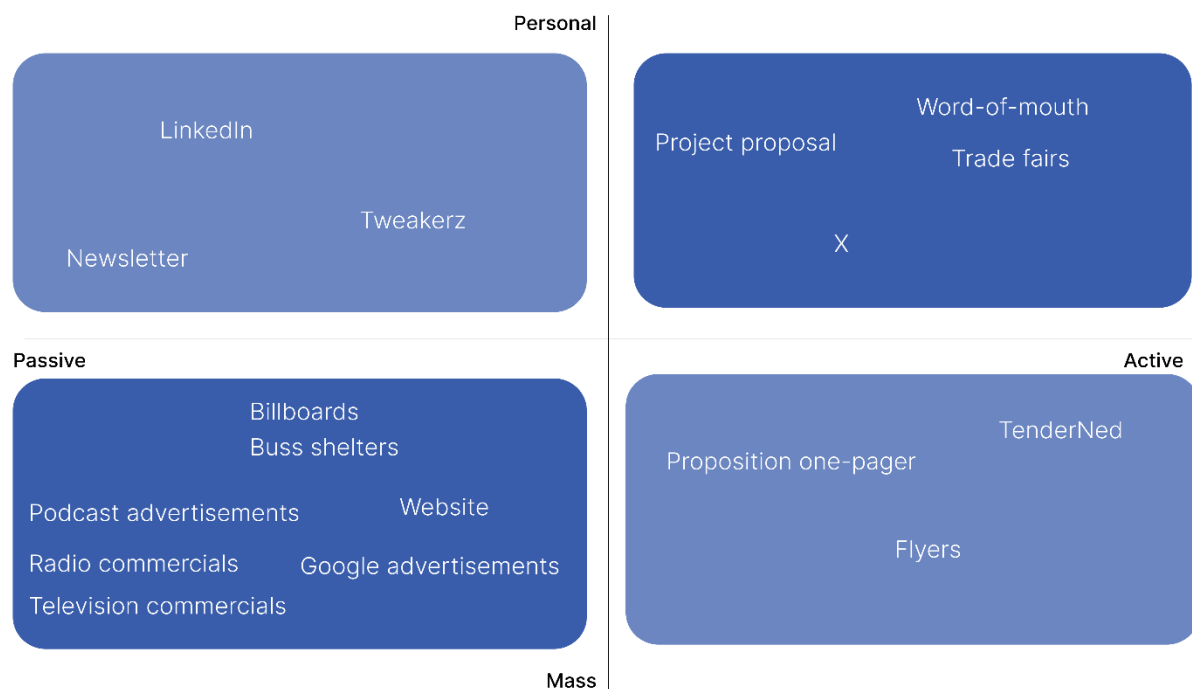


Figure 48: Communication channel overview

Equans mostly uses communication channels from the top two quadrants in Figure 48. They use employees' personal LinkedIn pages and personal networks and visit trade fairs. In the bottom quadrants, Equans e-mobility has a general website, and the B2B team wants to use a proposition one-pager. Apart from the proposition one-pager, all communication channels have not been differentiated to adhere to either the B2B team or the B2G team, but they are about e-mobility in general. To support the growth mentioned in the introduction, Equans wants to spread their brand awareness in general, and the B2B team will want to incorporate a push strategy in their communication while also reaching the optimal market segments for their proposition. Regarding communication channels this could be done through:

- Distinguishing B2G and B2B projects in e-mobility's existing communication channels
- Incorporate the use of passive mass communication channels to increase brand awareness and incorporate a push strategy
- Incorporate communication channels specifically tailored towards desired market segments

This first goal can be obtained easily through modifying existing communication channels. The second goal requires an investment, but it benefits both the B2B and the B2G teams. Appendix F shows that bus shelters and online advertisements are cost-effective ways to reach a large audience within a wide age range. Finally, the third goal can be achieved by using communication channels that are suitable for the two customer journeys identified previously in this chapter.

Bottom-up communication channels

The bottom-up customer journey reveals several leverage points regarding knowledge of CPOs, involving a CPO in the user's research phase and communicating the preferred proposal to decision influencers. These are outlined in Figure 49.

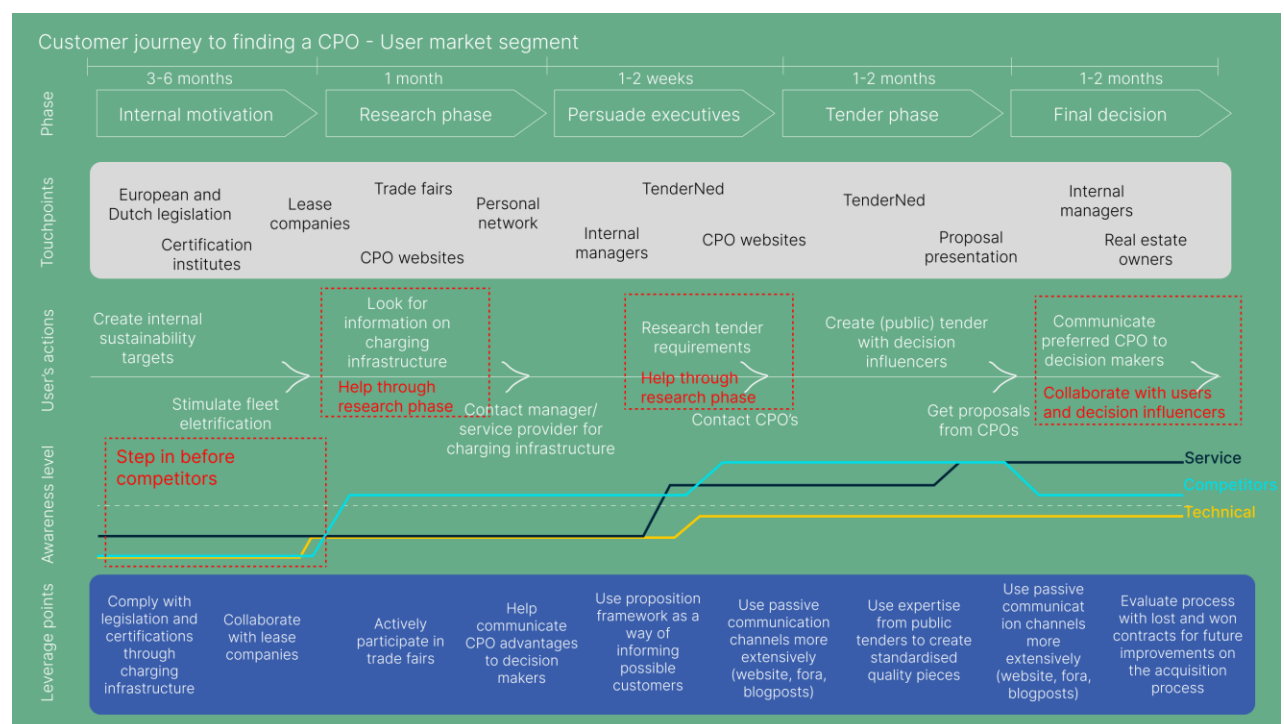


Figure 49: Leverage points within the bottom-up customer journey towards a CPO

In general, there are two timeframes in which Equans can contact this market segment: either at the beginning of their research, when the need for charging infrastructure arises and they have not yet been in touch with a CPO, or later in their research phase, when they contact CPOs to specify their requirements for charging infrastructure.

Before their research is in full swing, users should be actively pulled in by Equans. This could be done through large-reaching media, like billboards, websites and (Google) advertisements. When first contact is established through this, a proposition one-pager can be used. It is important to notice the knowledge of both CPOs and e-mobility in general is low in this phase. The focus of communication at this point should be to educate on the advantages of corporate charging in general and outsourcing it so there is no need to invest in turnkey hardware and internal technical maintenance resources.

During the research phase, most parties will talk to multiple CPOs. This phase requires communication already tailored towards a specific party's possibilities. Rather than convincing a party to want charging infrastructure, it is about convincing Equans' quality above competitors towards decision influencers. A proposition one-pager is a good starting point for first contact, as more in-depth information about Equans' services and how they fit a party's needs will put Equans ahead of the competition in this phase. To really speak to decision influencers on behalf of the user market segment their needs should be incorporated in Equans' proposal. Especially the advantages of outsourcing through an exploitation contract and compliance with legislation and certifications should be emphasised.

Top-down communication channels

Regarding the top-down customer journey towards a CPO, slightly different ways of communication could leverage the commercial acquisition process, as outlined in Figure 50.

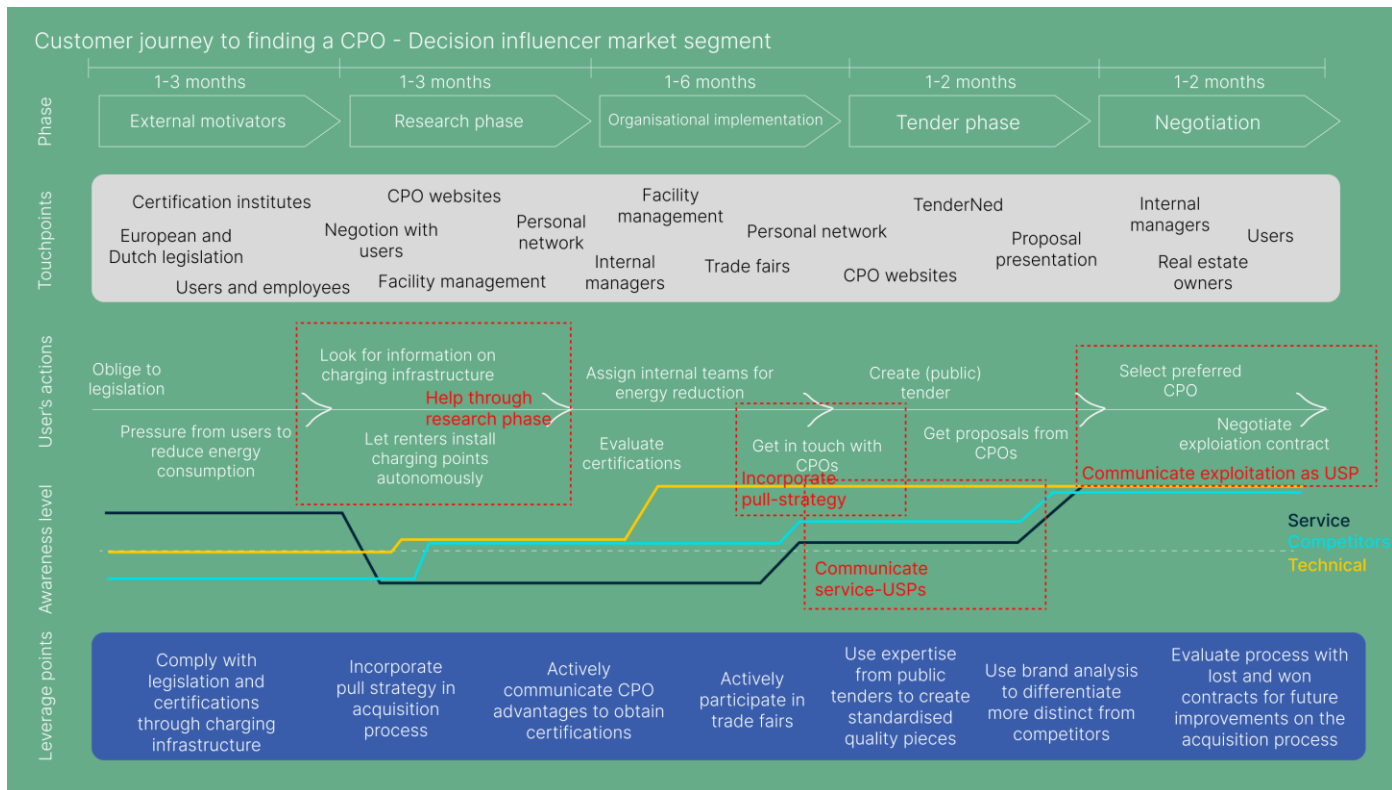


Figure 50: Leverage points within the top-down customer journey towards a CPO

As decision influencers often are in charge of managing and maintaining properties they have technical resources. This means they are more familiar with net congestion, installation of hardware and outsourcing services. When the need for charging infrastructure arises from users, legislation or broader internal sustainability goals, they often have information and resources at hand to immediately dive into the research phase.

At first, most parties search for turnkey charging infrastructure, as was mentioned in the interviews. For Equans to come into the picture during this phase, personal communication channels are required. These parties are often present at trade fairs and use their own channels to look for hardware and smart charging software specifically. At trade fairs, an active role could be taken by participating in discussion panels and presentations. Since a stand is often expensive, attending a trade fair to hand out flyers and business cards could in itself be valuable to generate more new leads.

When in touch with decision makers during their research phase, the focus should be on convincing the benefits of outsourcing through exploitation over turnkey infrastructure. A proposition one pager adjusted to the decision influencer market segment could be a starting point. During the interviews, it became clear that parties who chose turnkey charging infrastructure led to two possible conclusions (Appendix Q). Either they were convinced that outsourcing was not suitable for their property management, or managing CPS was such a burden that they changed their preference towards an exploitation model. It could be worth the effort to approach parties with turnkey charging points to check their experience and willingness to outsource it in hindsight.

In a later stage, when parties are already convinced about outsourcing, the focus within communication should be different. Especially larger parties often create a tender where multiple CPOs apply to. Differentiation from competitors should be the main focus. Both internal and external interviews reveal that the main reason for choosing a competitor over Equans is the charging price (Appendix S). Equans generally has a higher charging price. In return for this they do offer an exceptionally high uptime of 99 per cent, in-house knowledge throughout the whole process and 24/7 service. It is essential to communicate the value of the quality Equans can offer for the margins they apply to make sure the business case is profitable for both Equans and the customer. Interviewees mentioned that during this stage, Equans benefits from their personal communication, involvement and the 'favour factor'. These qualities can be communicated through personal meetings and proposal layouts that coordinate with the customer's values.

3.4 Conclusion Define Phase

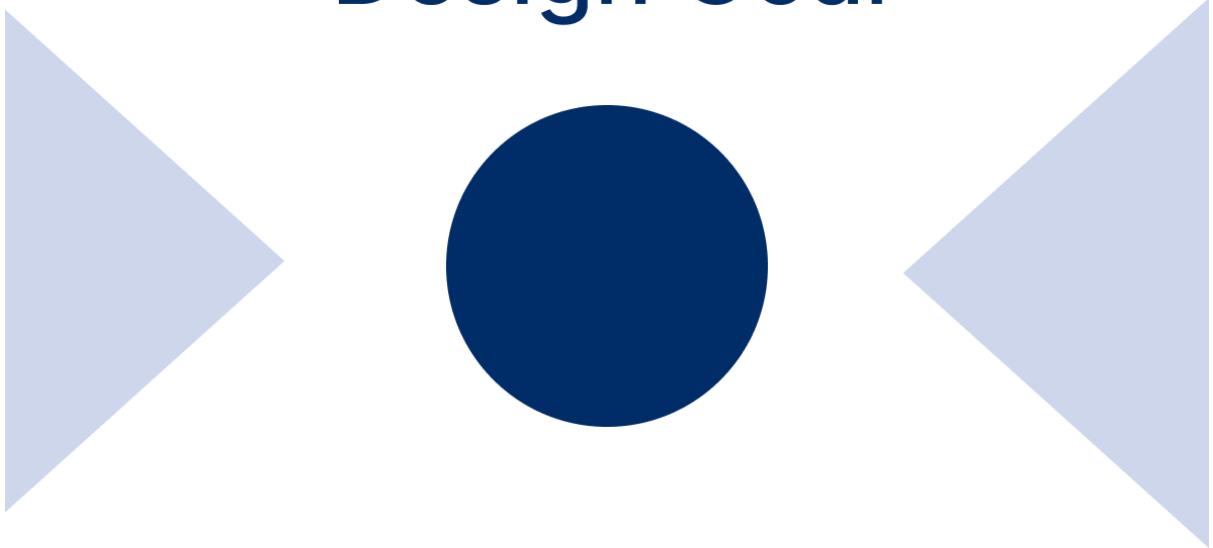
The results from the analysis phase have led to a wide range of possible strategic changes within Equans' proposal. Several results have been parameterised through synthesis so that they can be used as input for the proposal framework.

Within the current proposal, parameters were identified that can be explicitly adjusted towards needs within a market segment. In the design phase, these parameters will be put into a visual framework.

Customer motivations, needs and DMUs were synthesised into customer journeys starting from the need for charging infrastructure up to a contract with a CPO. As these customer journeys differ for a bottom-up and a top-down DMU, initiated by either users or decision influencers, they require different design directions. The bottom-up customer journey requires design choices that play into a lack of knowledge of CPOs and e-mobility in general. The top-down customer journey requires designs that emphasise Equans standing out from competitors through the quality they offer. These design directions will be expressed through communication channels that can be used to reach either users or decision influencers.

The communication channels used in the design phase serve multiple purposes. Aside from specifically adhering to a market segment that offers a strategic opportunity for Equans, they express a general strategic direction. Equans B2B want to balance a push and pull strategy when acquiring new customer leads and distinguish their expertise from the B2G team. To achieve these goals, a mix of passive and active communication channels will be created in the design phase. Posters, billboards and comprehensive proposition one-pagers form possible prototypes that can be designed for either one of the customer journeys.

Design Goal



A design goal is formulated to
kick-off the next diamond
“designing things right”

4. Design goal

Through synthesis, opportunities for developing Equans' B2B proposal were deducted from the analysis results. Across these opportunities, the need for standardisation is reoccurring. This project aims to design a market entry strategy for Equans B2B to enter the corporate AC charging market, while standardising the proposal. This leads to the following design goal:

"Design a market entry strategy towards newly defined market segments for Equans E-mobility in the context of business-to-business sales in corporate AC charging"

Future vision

This design goal is created to deliver a way for Equans to effectively obtain their strategic goals within corporate AC charging. For the market entry strategy to be effective, it needs to be based on a clear future vision within this sub-market. Based on the expected growth of the corporate AC charging sub-market, combined with the expected interest in exploitation contracts a future vision was formulated (Appendix M):

"Obtaining a significant market share in the corporate AC charging sub-market by passively and actively reaching users and decision makers within the target market to stimulate sustainability goals, obtaining certifications and obliging to legislation with exploitation contracts."

To create a tangible tool that can be used to execute a market entry strategy while standardising the proposal, a proposal framework will be created. The synthesis phase resulted in a number of possible parameters in a proposal framework that could be used to create designs as part of a market entry strategy. These specific deliverables can be integrated within the B2B team's current way of working and adhere to their desired strategic development, as elaborated on in the synthesis phase. The deliverables found to be suitable within a market entry strategy through analysis and synthesis are the following:

- A market segmentation of possible customers within corporate AC charging
- A proposal framework to formulate a proposal related to customer needs within specific market segments
- A roadmap to specify when action should be undertaken to obtain the desired market segments
- Communication channels that can be used during the implementation of the market entry strategy and proposal framework

These deliverables combined form a market entry strategy, where the new proposal format is supported with a timeline, suitable communication channels and expected growth of market share in the desired target market, visualised in Figure 51.

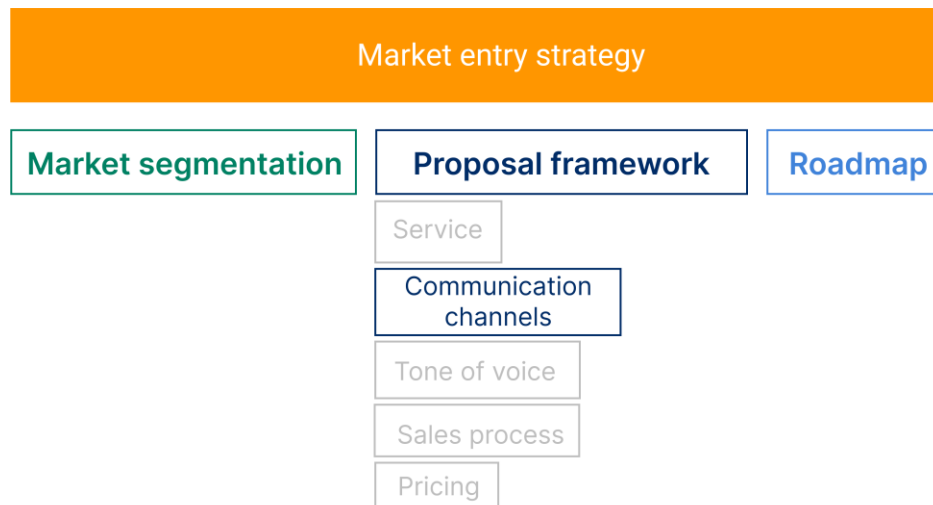


Figure 51: Design deliverables used in market entry strategy

Requirements for design

The deliverables that will be designed are aimed to support for the B2B team. The roadmap, market segmentation, and strategic direction will remain internal. Therefore, it can be assumed that the people using these deliverables have knowledge of e-mobility, B2B strategy and B2B's customer portfolio and way of working. To make sure the deliverables are feasible, viable and desirable within the B2B team, they need to adhere to the following requirements:

- Be able to be implemented within the current way of working
- Be able to be implemented without a significant investment
- Be able to be implemented without additional teams
- Be able to be used without a graphic designer

Mock-ups from communication channels can be used in external communication. These are meant for a wider audience and not only serve the B2B team but indirectly improve brand awareness of Equans e-mobility in general. These mock-ups need to adhere to the following requirements:

- Be understandable for people without knowledge of Equans e-mobility
- Be tailored towards market segments within corporate AC charging
- Adhere to Equans e-mobility's core values



Develop

In this phase the conclusions from the synthesis will be used as input for designing

5. Develop

In this chapter, the results from the synthesis will be used as input for the deliverables introduced in the design goal. Through a process of visual iterations, the designs will be improved until they can be tested according to the design requirements introduced in the design goal.

5.1 Market segmentation

The first part of the market entry strategy is a clear market segmentation within corporate commercial real estate. The market segments shown in Figure 52 were already identified in the target market analysis. As these segments will only be used internally, they only need to be validated internally.

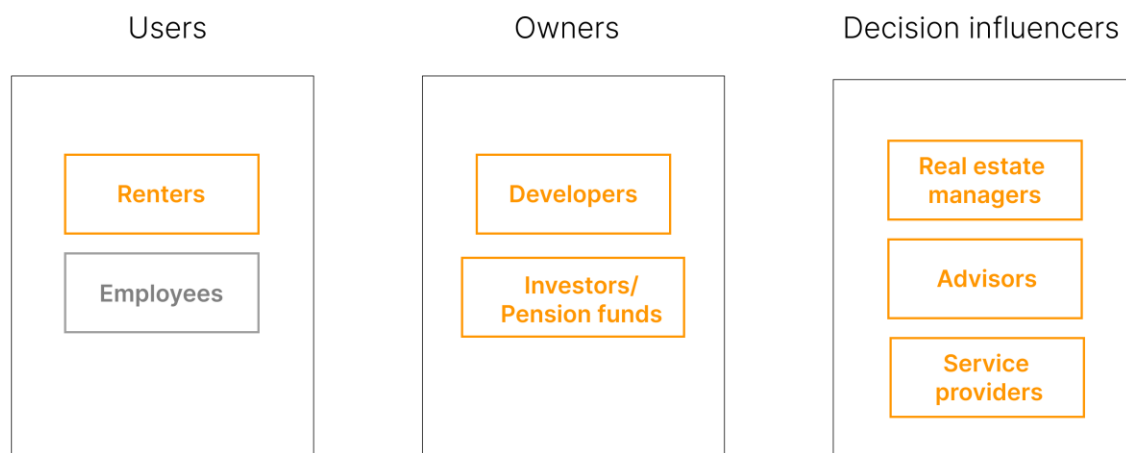


Figure 52: Market segments within corporate commercial real estate

Implementation market segmentation

The market segments can be used to quickly identify strategically optimal customers. When a customer can be identified as either a user or a decision influencer based on the stakeholder type they are, the proposal framework and communication channels designed to adhere to their needs can be used in the commercial acquisition process.

5.2 Proposal framework

The proposal framework is meant to be a tool that can be used by the B2B team when enrolling the market entry strategy within corporate AC charging. In the internal analysis, parts of Equans' proposal were parameterised. These parameters can be emphasised or adjusted in communication without changing the core proposition. Additionally, user needs within the three market segments were identified in the target market analysis.

Through a brainstorming session with a B2B manager, a format to combine these two sets of parameters was created (Appendix E). Figure 53 shows the initial format. On one side, the market segments are shown, and on the other, the parameters within the proposal. An important notice is that market segments' preferences within the proposal parameters are

shown on a scale. This way, differences between market segments are clear visually through their relative position on the same scale.

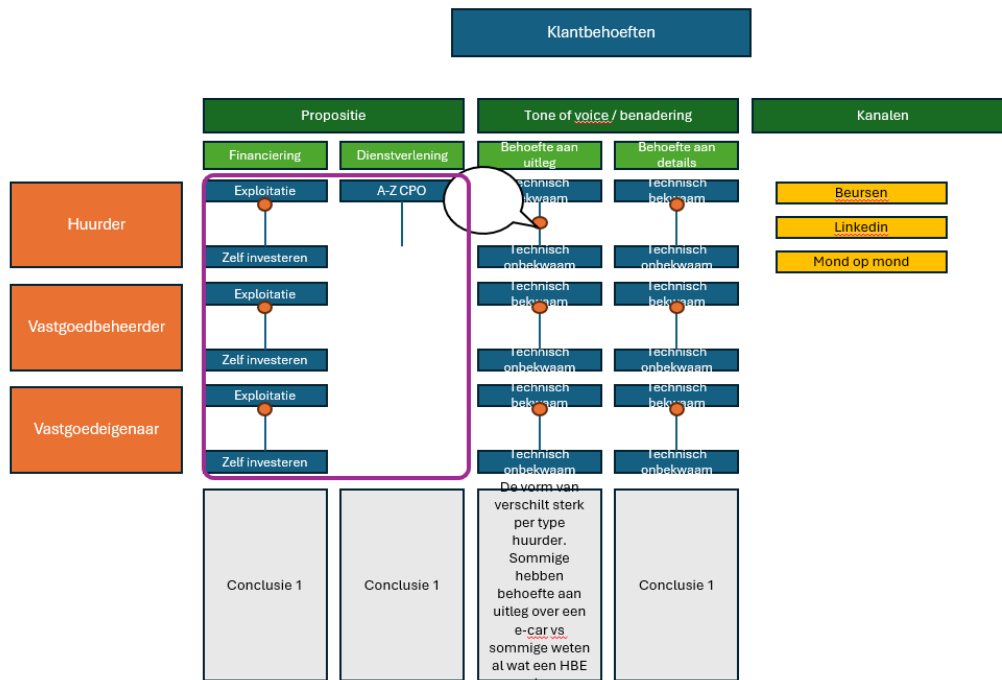


Figure 53: Initial proposal framework format

Starting from the first format, a new version of the framework was created. This version shows all parameters on a scale, repeated for each market segment. Figure 54 shows the proposal framework with all parameters, and conclusions on the main differences between them.

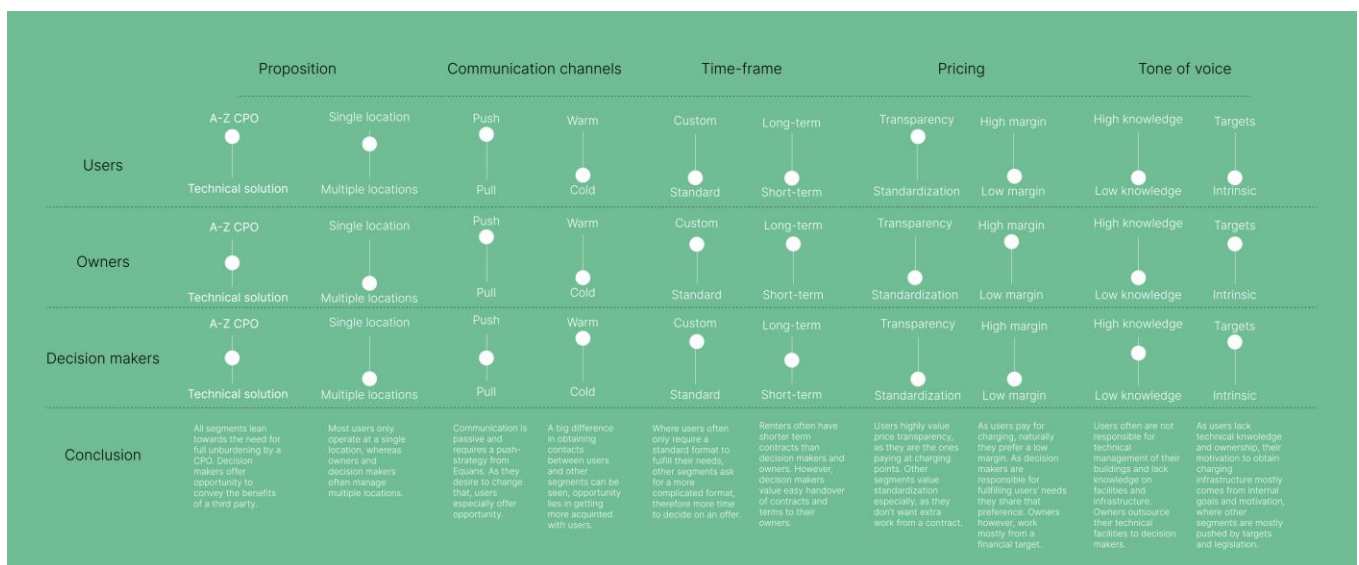


Figure 54: Second proposal framework format

The second format was shown to mentors and students at the Industrial Design Engineering (IDE) faculty in Delft, where the following points of improvement were pointed out:

- The many scales make it hard to see the differences between the market segments immediately. By placing all segments on the same scale instead of repeating it, this could become clearer.
- The white font on the light green background is difficult to read, making the background darker could improve this.

With these points in mind, a third version was made, shown in Figure 55.

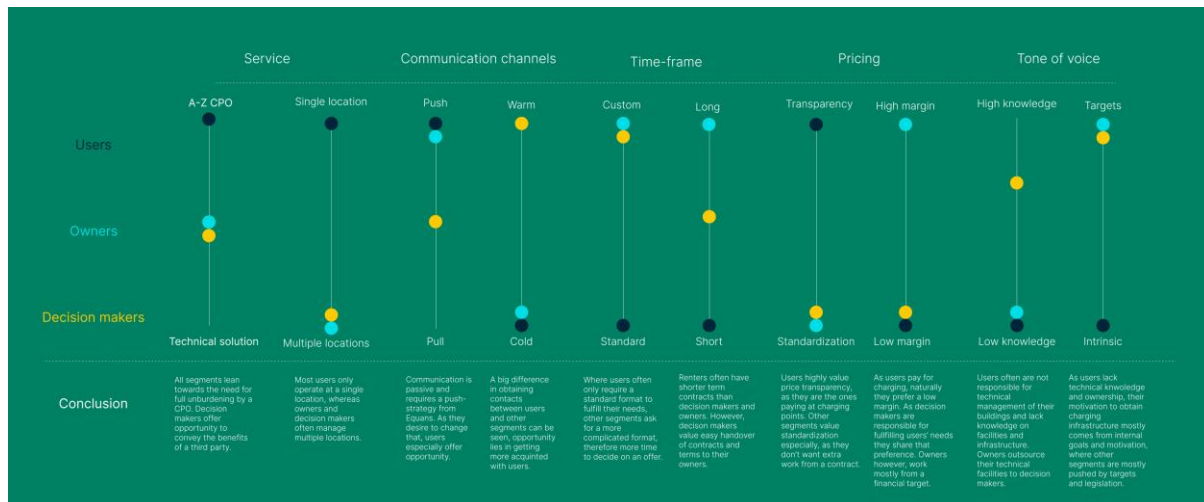


Figure 55: Third proposal framework format

This third version was shown to mentors at both the IDE faculty and at Equans, which resulted in the following points of improvement:

- The market segments on the left are not clearly connected to the different dots on the scales. Creating a legend could improve this.
- The parameters do not feel coherent in the current order; maintaining the order in which the parameters were presented in in the internal analysis could improve this.
- Not all names assigned to the proposal parameters fully encompass the meaning of each parameter; exploring different terms could enhance this.

These points led to the fourth version, shown in Figure 56 (Appendix G).

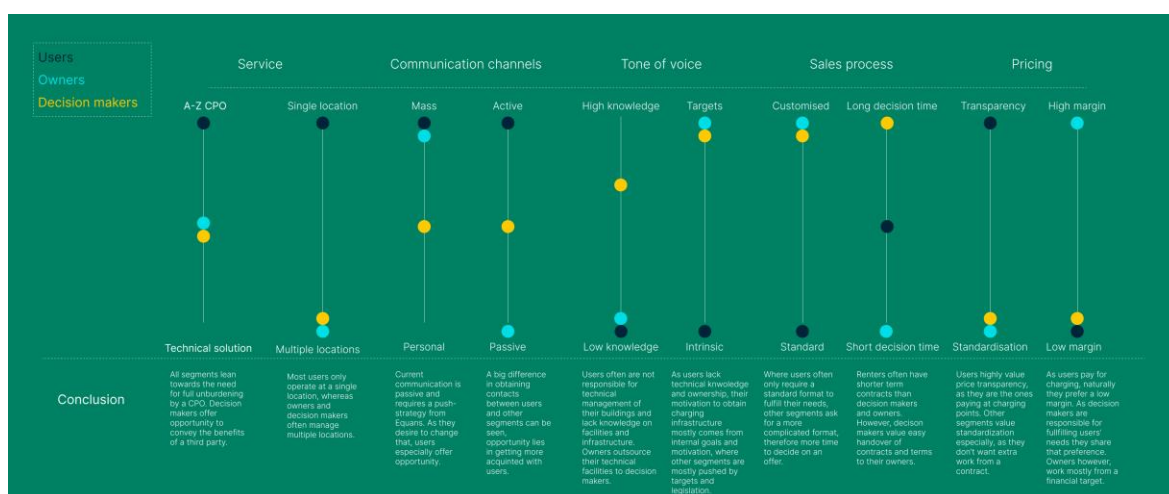


Figure 56: Fourth proposal framework format

This fourth version adheres to the design requirements specified in the design goal:

- The ability to be implemented within the current way of working
- Be able to be implemented without a significant investment
- Be able to be implemented without additional teams
- Be able to be used without a graphic designer

Therefore, this version of the proposal framework will be further validated in the next chapter.

Implementation of proposal framework

The proposal framework can be used internally to standardise communication with possible customers. To use it, a customer needs to be classified as one of the three market segments. Then, communication with this customer can be adjusted to the customer by using the parameters specified in the framework. This erases the need to adapt communication towards the specific customer, as their needs can be addressed by adhering to the market segment's needs they adhere to.

5.3 Communication channels

Through synthesis, the importance of communication channels in the implementation of a new market entry strategy. In the design phase, a proposition one-pager will be created specifically for the Decision influencer's and User's needs, which were elaborated on in the proposal framework. This is an active communication channel that can be used early in the commercial acquisition process for new customers.

To include a passive mass communication channel, which Equans currently lacks, a poster format was chosen. Although visible for a larger audience, these will also be designed with either Decision influencers or Users in mind. This way, these posters can be validated through the same process as the proposition one-pagers.

5.3.1 Proposition one-pager

There are multiple reasons for designing a proposition one-pager as part of a market entry strategy. First of all, it is a communication channel that can be used in personal communication with low effort. Second, it can easily be adjusted to specific needs within a market segment. Third, it is a format Equans has been wanting to use as a way of standardising their proposal, which became apparent from meeting observations.

In the e-mobility and corporate energy system market, 'quickscans' are a popular tool in the process of lead generation. Competitor's websites have a tool where possible customers can calculate what type of charging infrastructure is suitable for them by filling in basic datapoints on their energy usage. Equans' B2G Finance team has created a calculation tool to implement a type of quickscan in their website. In collaboration with the Finance and B2B team, a standard format for this quickscan was created. This format consists of four pages. The first contains the datapoints a company has filled in, the other pages are standard information on Equans' proposition. Two versions of the first page were made, one for Logistic DC charging and one for Corporate AC charging. This quickscan forms the first version of a type of one-pager, and is shown in Figure 57.



Figure 57: B2B quickscan

The page created for corporate AC charging has been developed for an example case in Figure 58. This page is most suitable to further iterate towards a proposition one-pager, as it contains compact information specified towards real estate.

[Bedrijfsnaam] Personal Charging Profile

Laadprijs

| | |
|-------|------------------|
| €0,14 | Installatieprijs |
| €0,20 | Energieprijs |

€0,34 / kWh

*Deze prijzen zijn een indicatie, voor een exact aanbod nemen we graag contact met u op

Het is ons een genoegen u via deze weg een aanbieding te doen voor de [scope project] van laadinfrastructuur op uw locatie in [plaats klant].

Op basis van de gegevens die u heeft ingevuld op ladenvoorbezoekers.nl hebben wij een indicatie gemaakt van de mogelijkheden voor een laadinfrastructuur en bijbehorende vergoeding. Zo heeft u naast een mogelijkheid tot het aanbieden van duurzaam transport aan [klanten/ bezoekers/ huurders/ werknemers] ook een extra inkomstenbron!

Vanuit Equans bieden wij volledige ontzorging omtrent laadinfrastructuur, van plaatsing tot exploitatie. Onze monteurs en adviseurs zijn altijd bereikbaar, zodat u zich niet bezig hoeft te houden met alle technische en logistieke specificaties.


Duurzaamheid

Door een laadplein te realiseren krijgt u toegang tot een scala aan voordelen. Voor u kunnen we, onder andere, het volgende aanbieden:

- Een **reductie in CO2** uitstoot van uw wagenpark
- Een **duurzame ontwikkeling** voor (de uitstraling van) uw bedrijf
- U komt in aanmerking voor duurzaamheidscoertificering BREEAM

Voorstel

U heeft aangegeven dat u laadinfrastructuur wilt [scope: realiseren/ vervangen/ verplaatsen/etc.] op het parkeerterrein in [beschrijving locatie laadplein]. (Aanvullende omschrijving project, bijvoorbeeld: de huidige (single-socket) EVBox laadstations op de buiten parkeerplaatsen ten noorden van de parkeergarage en op de begane grond binnen de parkeergarage zullen vervangen worden door nieuwe, double-socket laadstations op de eerste verdieping van de parkeergarage).



Model

De EV Box Business Line G3 is mogelijk een geschikte laadpaal voor uw uitvraag. Dit model omvat:

- Laden van 3,7 kW tot 11 kW
- RFID
- Stroom verrekening
- DC beveiliging
- Aardlekbeveiliging
- Door lussen voedingskabel mogelijk

Beheer en onderhoud

We stellen het volgende back-office systeem voor u voor. Verderop in dit document lichten we de functies uitgebreid uit:

- Back-Office van Greenflux
- 24/7 telefonische support voor het op afstand verhelpen van storingen;
- 90% van de storingen op afstand verhelpen

~42 kilotonnes of CO2 avoided

Since Q1 2023

Insert afbeelding van bedrijf

Figure 58; quickscan page for a AC real estate case

The quickscan format still requires information to be adjusted for each customer it is sent to, which is not desired within the market entry strategy. Therefore, during the analysis phase of this project, the B2B team has further developed this format into a standardised one-pager for real estate. This format is shown in Figure 59 and explicitly communicates the target market motivations for obtaining charging infrastructure found in the analysis of this project, like certifications and credible unbundling.

Equans e-Mobility: Ontzorging van A tot Z in laadoplossingen voor vastgoed

Laadoplossingen worden elke dag relevanter voor vastgoed

- Duurzaamheid agenda
- Wetgeving
- Certificaties, zoals BREEAM

Bij Equans werken we al 13 jaar aan zorgeloos kunnen laden!

- Verspreid over 29 locaties in Nederland zijn we altijd om de hoek.
- Met onze brede technische dienstverlening hebben we de kennis in huis om de beste laadoplossing te bedenken.

Ons e-Mobility team schakelt snel en is gemakkelijk te bereiken

- Na een kennismakingsgesprek komen we langs op locatie. Zo kunnen we advies op maat geven.
- Van advies & ontwerp naar een offerte binnen 2 weken

Equans e-Mobility ontzorgt in het kunnen aanbieden van laadinfrastructuur van A tot Z

Advies & Ontwerp

Realisatie

Beheer & Onderhoud

En biedt laden as-a-service aan

Geen investering benodigd

Pro-actief bijplaatsen

Kiezen voor Equans betekent kiezen voor:

Alles in eigen beheer

Toekomst bestendig

99% uptime

We beheren reeds 30.000 laadpunten, zoals:

Fletcher Hotels

49 locaties, 360 laadpunten

Danone

1 locatie, 28 laadpunten

Neem een kijkje in ons huidige portfolio

Bel ons vandaag nog voor een vrijblijvend gesprek

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Sales Manager B2B Real Estate
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Figure 59: B2B one-pager for real estate

Although this one-pager does help in the standardisation of the commercial acquisition process, it is not yet in line with the proposal framework as it is not specified towards a market segment. Therefore, two new one-pagers were created, adhering to either the Decision influencer's or the User's needs. When applying the proposal framework, the communication aspects that need to be emphasised, convinced or tailored become clear. Figure 60 shows an overview of these differences.

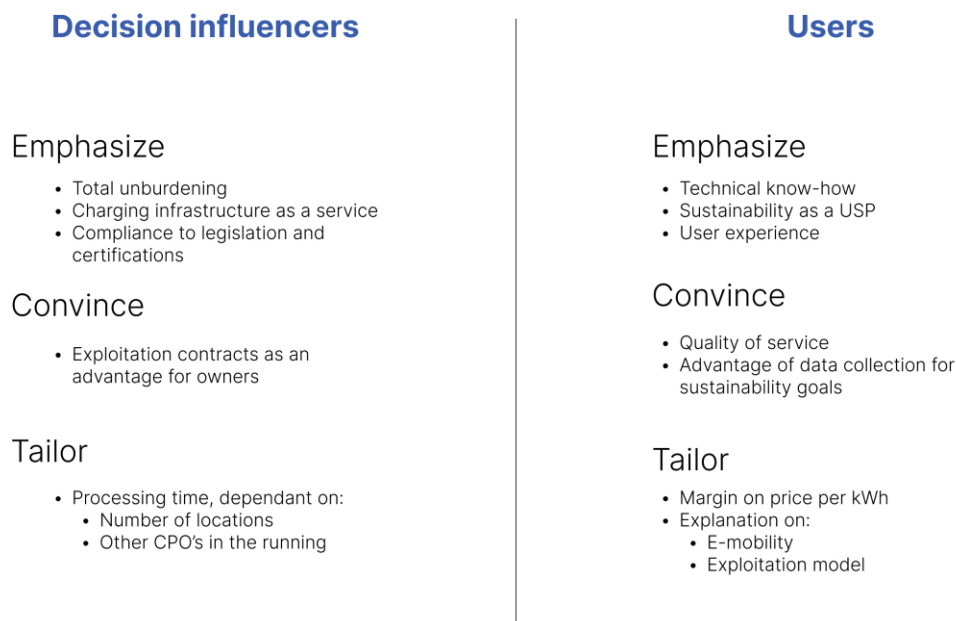


Figure 60: Overview of communicative needs within market segments

These communicative needs were used as input for two one-pagers, which differ in headings and elaborate information. Figure 61 shows the one-pager for Users, Figure 62 shows the one-pager for Decision influencers.

Equans e-Mobility: A-Z expertise in duurzame laadpleinen

Zorgeloze realisatie van een laadplein voor uw werkplek

Technische expertise

Als marktleider in publieke AC laadpalen heeft Equans alle technische kennis in huis om uw laadplein te realiseren en onderhouden. Van installatie tot technisch onderhoud en software platformen, wij nemen alles van je over.

Duurzame oplossing

Duurzaamheid is één van onze kernwaarden bij Equans. De stroom in onze publieke laadpalen is 100% afkomstig van duurzame bronnen, we bieden refurbished laadpalen aan en kunnen uw energieverbruik verminderen met onze slim laden software. Daarnaast kunnen we u helpen te voldoen aan wetgeving door, bijvoorbeeld, dataverzameling.

Gebruiksgemak

Als A-Z CPO nemen wij het hele proces rondom uw laadplein over, zodat u er alleen nog maar gebruik van hoeft te maken. Bij Equans doen we veel onderzoek en pilots omtrent onze customer journey, gebruiksgemak en communicatie met onze gebruikers, zodat we uw ervaring steeds beter kunnen maken.

Wilt u uw **energie uitstoot verminderen** en uw **mobiteit verduurzamen**? Bij Equans verzorgen wij een laadplein zodat uw werknemers zorgeloos op kantoor kunnen laden. We maken een advies en ontwerp op maat. Daarna gaan we **binnen twee weken van ontwerp naar offerte**. Met ons exploitatiemodel nemen we het beheer van het laadplein en de benodigde investering op ons. Zo krijgt u een toekomstbestendige oplossing zonder extra kostenpost.

Advies

Installatie

Beheer


Laadprijs

Installatieprijs

Energieprijs

We zijn transparant over onze laadprijs. Afhankelijk van installatiekosten en energieaanbod zullen we voor u **de laagst mogelijke laadprijs** berekenen.

Benieuwd naar de mogelijkheden?
Neem contact op voor een **vrijblijvend gesprek**




Bilal Harb
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M +316 57 65 19 08

Kies net als onze klanten voor:

99% uptime

Gemak

Toekomstbestendig






Figure 61: One-pager for Users

Equans e-Mobility: Volledige ontzorging in duurzame laadpleinen

As-a-service laadinfrastructuur voor al uw locaties

Volledige ontzorging

Als marktleider in publieke AC laadpalen heeft Equans alle technische kennis in huis om uw laadplein te realiseren en onderhouden. Van installatie tot technisch onderhoud en software platformen, wij nemen alles van je over. Daarbij nemen we ook de investering van u over, zodat u alleen maar bezig hoeft te zijn met laden.

Voldoe aan wetgeving en certificering

Duurzaamheid is één van onze kernwaarden bij Equans. De stroom in onze publieke laadpalen is 100% afkomstig van duurzame bronnen, we bieden refurbished laadpalen aan en kunnen uw energieverbruik verminderen met onze slim laden software. Daarmee kunnen we u helpen te voldoen aan wetgeving en certificeringen als BREEAM, LEAN en WELL.

Laden as-a-service

Als A-Z CPO nemen wij het hele proces rondom uw laadplein over, zodat u er alleen nog maar gebruik van hoeft te maken. Wij zorgen dat uw laadplein altijd up to date is met onze nieuwste software en we handelen storingen en klachten direct zelf af.

Wilt u uw **energie uitstoot verminderen** en uw **mobiteit verduurzamen**? Bij Equans verzorgen wij een laadplein zodat uw huurders zorgeloos op kantoor kunnen laden. We maken een advies en ontwerp op maat. Daarna gaan we **binnen twee weken van ontwerp naar offerte**. Met ons exploitatiemodel nemen we het beheer van het laadplein en de benodigde investering op ons. Zo krijgt u een **toekomstbestendige oplossing zonder extra kostenpost**.

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Beheer

Laadprijs

Installatieprijs

Energieprijs

We zijn transparant over onze laadprijs. Afhankelijk van installatiekosten en energieaanbod zullen we voor u de ideale marge op de laadprijs berekenen. Afhankelijk van uw wensen vormt laadinfrastructuur zo mogelijk **een extra inkomstenbron dankzij ons exploitatiemodel**.

Benieuwd naar de mogelijkheden?
Neem contact op voor een **vrijblijvend gesprek**



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99% uptime

Gemak

Toekomstbestendig





Figure 62: One-pager for Decision influencers

These one-pagers were shown to mentors within Equans and IDE. An important point for improvement was that it is hard to notice the difference between these one-pagers. To be able to perform A-B tests in the validation phase, new versions were made with more significant visual differences in colour, shown in Figure 63 and Figure 64 (Appendix G).

Equans e-Mobility: A-Z expertise in duurzame laadpleinen

Zorgeloze realisatie van een laadplein voor uw werkplek

Technische expertise

Als marktleider in publieke AC laadpalen heeft Equans alle technische kennis in huis om uw laadplein te realiseren en onderhouden. Van installatie tot technisch onderhoud en software platformen, wij nemen alles van je over.

Duurzame oplossing

Duurzaamheid is één van onze kernwaarden bij Equans. De stroom in onze publieke laadpalen is 100% afkomstig van duurzame bronnen, we bieden refurbished laadpalen aan en kunnen uw energieverbruik verminderen met onze slim laden software. Daarnaast kunnen we u helpen te voldoen aan wetgeving door, bijvoorbeeld, dataverzameling.

Gebruiksgemak

Als A-Z CPO nemen wij het hele proces rondom uw laadplein over, zodat u er alleen nog maar gebruik van hoeft te maken. Bij Equans doen we veel onderzoek en pilots omtrent onze customer journey, gebruiksgemak en communicatie met onze gebruikers, zodat we uw ervaring steeds beter kunnen maken.

Wilt u uw **energie uitstoot verminderen** en uw **mobiteit verduurzamen**? Bij Equans verzorgen wij een laadplein zodat uw werknemers zorgeloos op kantoor kunnen laden. We maken een advies en ontwerp op maat. Daarna gaan we **binnen twee weken van ontwerp naar offerte**. Met ons exploitatiemodel nemen we het beheer van het laadplein en de benodigde investering op ons. Zo krijgt u een toekomstbestendige oplossing zonder extra kostenpost.

Advies

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Beheer


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Installatieprijs

Energieprijs

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99% uptime

Gemak

Duurzame mobiliteit






Figure 63: One-pager for Users

Equans e-Mobility: Volledige ontzorging in duurzame laadpleinen

As-a-service laadinfrastructuur voor al uw locaties

Volledige ontzorging

Als marktleider in publieke AC laadpalen heeft Equans alle technische kennis in huis om uw laadplein te realiseren en onderhouden. Van installatie tot technisch onderhoud en software platformen, wij nemen alles van je over. Daarbij nemen we ook de investering van u over, zodat u alleen maar bezig hoeft te zijn met laden.

Voldoe aan wetgeving en certificering

Duurzaamheid is één van onze kernwaarden bij Equans. De stroom in onze publieke laadpalen is 100% afkomstig van duurzame bronnen, we bieden refurbished laadpalen aan en kunnen uw energieverbruik verminderen met onze slim laden software. Daarmee kunnen we u helpen te voldoen aan wetgeving en certificeringen als BREEAM, LEAN en WELL.

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Beheer

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Installatieprijs

Energieprijs

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Kies net als onze klanten voor:

99% uptime

Geen eigen investering

Toekomstbestendig





Figure 64: One-pager for Decision influencers

Implementation proposition one-pagers

These one-pagers are tailored towards market segments by using the proposal framework and were created in collaboration with Equans' employees to make sure they adhere to Equans' values. They can be used in the beginning of the commercial acquisition process. By sending a new customer a one-pager, they get information that is tailored towards them

without the need for Equans to adjust the information. This helps to standardise the commercial acquisition process in a phase where return on investment is not yet guaranteed for Equans.

5.3.2 Posters

As mentioned in the introduction of the communication channel designs, it is desired to incorporate a mass communication channel in the market entry strategy. This will create brand awareness for both the B2B and the B2G teams and help incorporate a pull strategy in the commercial acquisition process. This will be designed in the form of a billboard that also can be used as a poster or advert in a bus shelter.

To create the posters, pictures from Equans' e-mobility database were used. This way, the posters will be recognisable within Equans e-mobility's current visual style. The most important difference between the two market segments these posters are designed for is on the User side, a need for sustainable solutions and lack of information, and on the Decision influencer side, a need for unburdening and professional technical expertise.

For the User market segment, the poster shown in Figure 65 was created. An image was chosen that clearly shows the context of e-mobility and emphasis was put on sustainability, price, and reliability.



Figure 65: Poster for Users

For the Decision influencer market segment an image was chosen that shows professional expertise. Emphasis was put on value retention, reliability and lack of investment from the customer. This poster is shown in Figure 66.



Figure 66: Poster for Users

Implementation posters

The posters are tailored towards market segments using the proposal framework, but they can be used to reach a wider audience. To make sure they adhere to Equans e-mobility's core values the current visual style and publicly communicated USPs were used. This makes them useful tools for improving on Equans' lack of marketing to a wider audience. If the posters are put in the public space, Equans will be known to possible customers without actively contacting them, helping to incorporate a pull strategy in the commercial acquisition process.

5.4 Roadmap

The final deliverable created as part of the market entry strategy is a roadmap. This roadmap is composed by combining all separate conclusions and designs along an implementation timeline, along the method of Simonse (2017). In this roadmap a visual overview is given on how a market entry strategy could be implemented in the next five years. It is divided into three phases, referred to as horizons. According to the design roadmapping method, these horizons are meant to elevate specific aspects of 'product' development, as shown in Figure 67. In this context, the product is Equans corporate AC charging proposal.

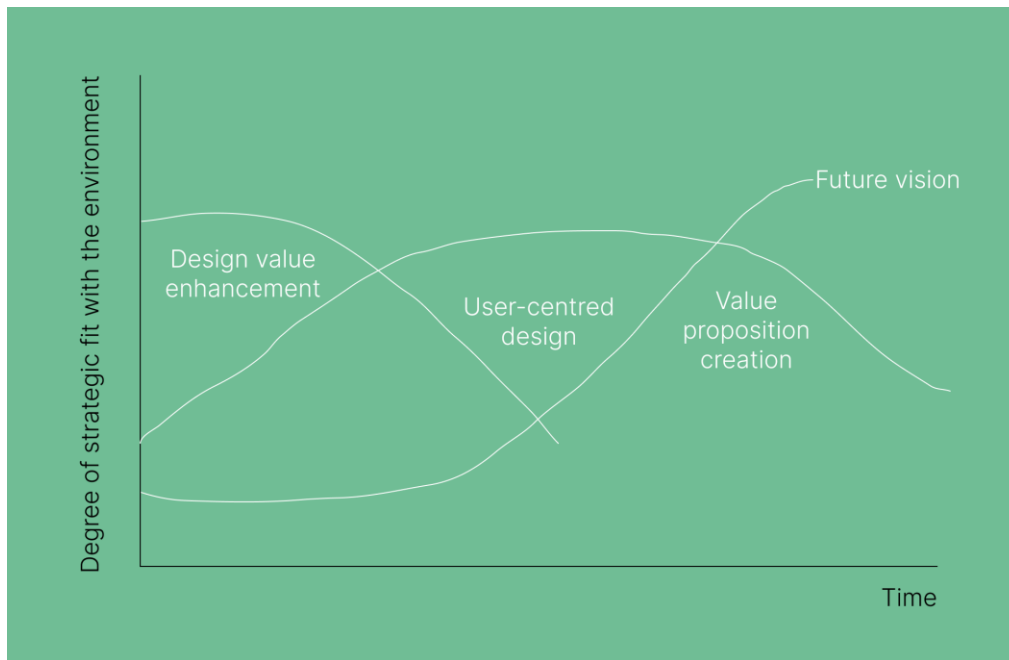


Figure 67: Strategic life cycle model

Figure 68 shows the first version of this roadmap.

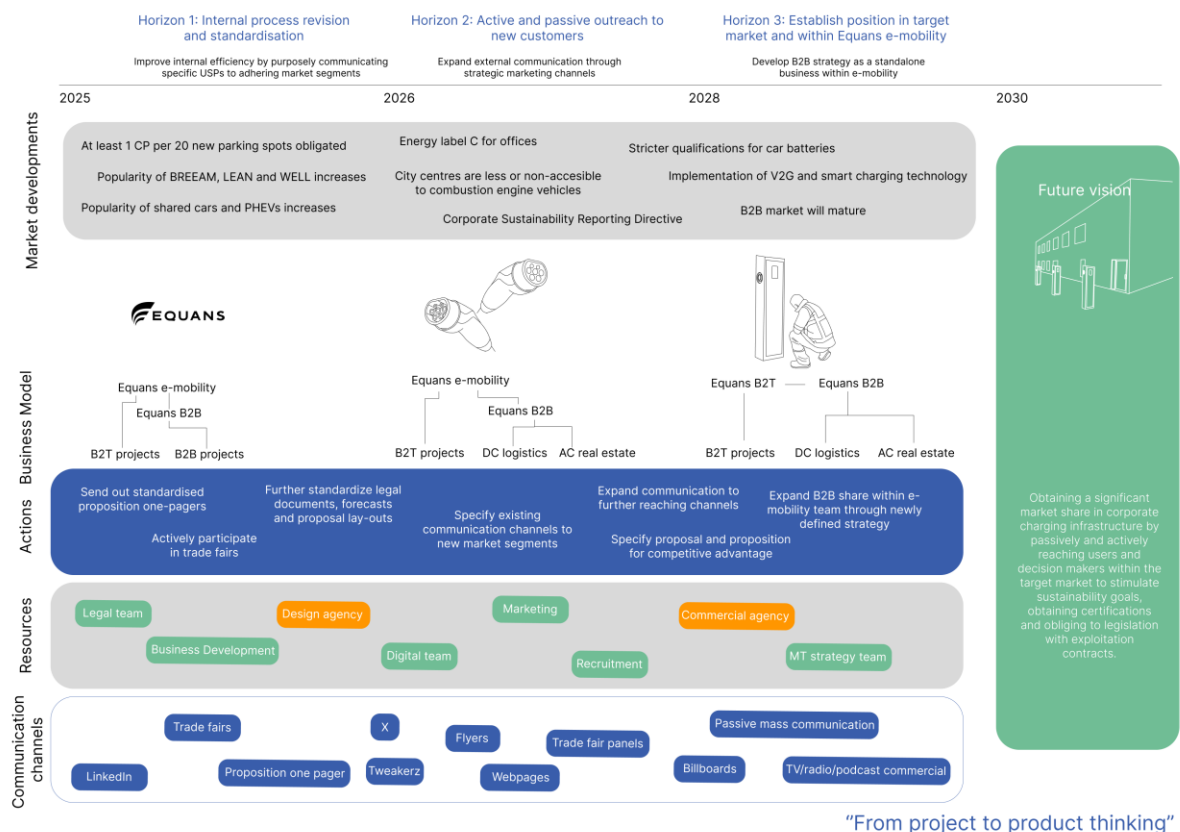


Figure 68: First version roadmap

After showing this roadmap to mentors at IDE and Equans, the following point of improvement became clear:

- The line 'from project to product thinking' implies a new design direction that is not involved in the market entry strategy. This would require additional literature research and designs. To make sure the roadmap adheres to the findings from this project this line will be kept out of the roadmap.
- Although the time frame of this project was researched until 2030 to anticipate market developments and legislation, Equans is eager to start on the implementation of the market entry strategy. Therefore, the future vision will remain focused on 2030, but the horizons can take place earlier.
- Not all text is readable, this could be improved through bigger fonts and contrasting colours.

With these points of improvement in mind, a second version was created, which is shown in Figure 69 and Appendix G.

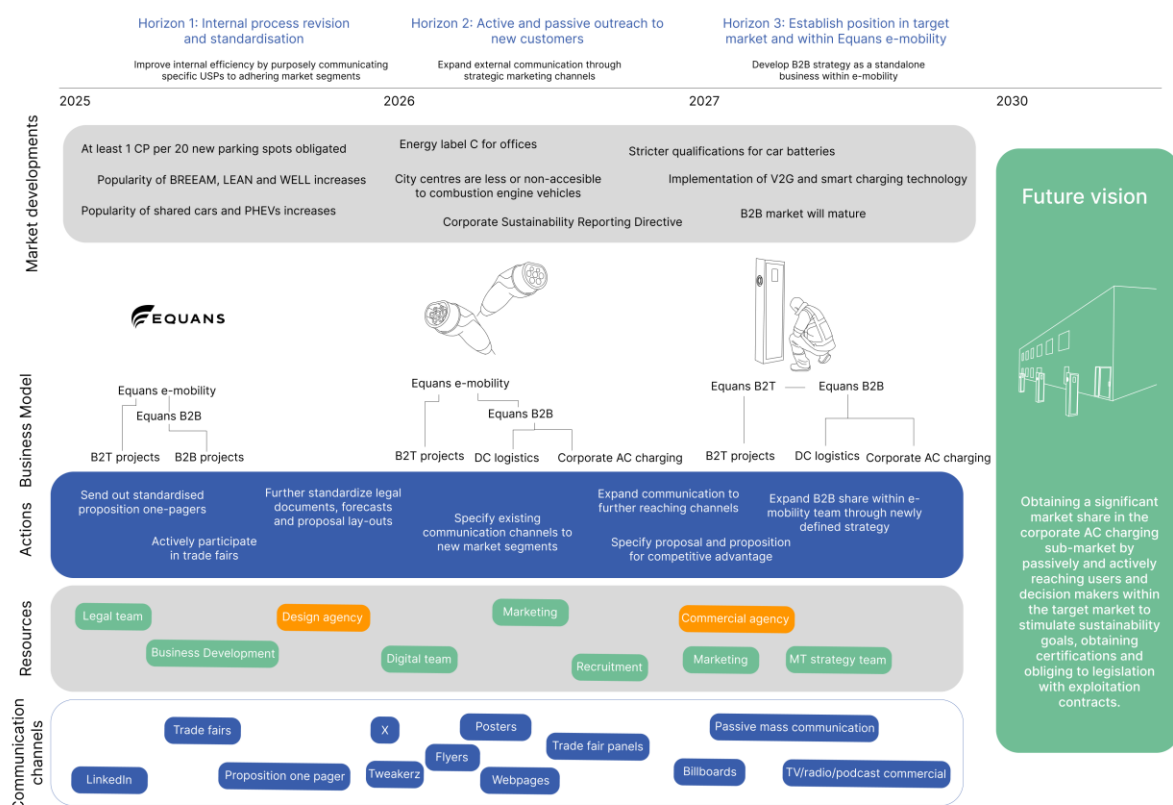


Figure 69: Second version roadmap

This roadmap is an explanation of the market entry strategy created in this project. By walking through all phases of the roadmap, the steps that need to be taken to achieve the future vision are explained.

Future vision

To construct a concrete path towards future developments the strategy is started off by defining the final future vision. This is set in the year 2030 since this is long enough to offer room for significant market developments but short enough to formulate concrete steps to

complete in the years leading up to it. Additionally, all contextual factors, like legislation and market size calculations, are researched until the year 2030. The main goal the future vision embodies is reaching Equans' desired market share within commercial real estate. It is important to notice this share is restricted by two factors: First, the large number of competitors and the uncertainty regarding their possible market share. Second, Equans' exploitation business model. Based on existing customers, the possible market share of exploitation contracts opposed to turnkey contracts was made. The exact estimations and market shares are confidential and can be found in Appendix M. The future vision is as follows:

"Obtaining a significant market share in the corporate AC charging sub-market by passively and actively reaching users and decision makers within the target market to stimulate sustainability goals, obtaining certifications and obliging to legislation with exploitation contracts."

Horizon 1 – Internal process revision and standardisation

In line with the design roadmapping method, this horizon is focused around the enhancement of the current proposal through proposition changes and standardisations (Simonse, 2017). In the span of a year Equans can further standardise the documents used for their proposition. This consists of:

- Legal documents
 - o The introduction of certifications and how Equans can help to obtain them
- Proposition one-pagers for the market segments founded in this project
- Web pages specified towards the market segments specified in this project

Within this horizon these documents will be revised, customized towards the User and Decision influencer market segments and standardised were possible.

Horizon 2 – Active and passive outreach to new customers

In this horizon new users are incorporated into the strategic deployment of the designs developed during the first horizon. It is focused around reaching a larger group of new customers, outside the current network of the B2B team. This is a way of incorporating the desired pull strategy into the commercial acquisition process. It involves the following steps:

- Creating targeted marketing outings through market segment-specific communication channels
- Expand marketing outings to more active communication channels, like:
 - o X
 - o LinkedIn
 - o Trade fair panels

Horizon 3 – Establish position in target market and within Equans e-mobility

In the final horizon, from 2027 up until 2030, an extra step is taken. With the value enhancement of the existing proposition in the first horizon and the user-centred steps in the second horizon a new step in value enhancement can be done in this final phase. The

context regarding this phase is less certain, as it is further away in time, but this does offer room to design for more radical visions. The goal here is to expand Equans' proposition and strategy towards the established party in the competitive landscape they intend to be. This means involving:

- Further reaching communication channels, like commercials
- Differ Equans' B2B strategy more from their B2G strategy

Implementation roadmap

Like the proposal framework, the roadmap is an internal document. The roadmap in itself can be presented and used as a guideline without significant investment, additional teams, changes in the way of working and the use of a graphic designer. However, the whole purpose of the roadmap is to explain where changes in the way of working need to be made and what investments and additional teams are needed to obtain this. The roadmap in itself is a deliverable that fits the design goal, but it is the embodiment of the market entry strategy as a whole.



Deliver

Through a process of iteration and validation, the deliverables from the design phase are tested and improved.

6. Deliver

In this chapter, the deliverables from the design phase, main assumptions on the target market, and usability of the findings in this project will be validated. This will be done through interviews with customers, competitors and internal experts. Interview transcripts and results can be found in Appendix I, and Appendix R. Figure 70 shows all parties interviewed for this chapter.

| Semi-structured customer interviews | | | |
|-------------------------------------|------------------------------|----------------------------------------------|------------------------|
| Company | Stakeholder type | Function in company | Working with Equans? |
| Equity Estate | Service provider Investor | Asset manager | No, chose other CPO |
| Danone | Renter | Facilities manager Sustainability manager | Yes, in exploitation |
| Mileway | Real estate manager | Sustainability manager Asset manager | Negotiating with owner |

| Semi-structured Competitor interview | | | |
|--------------------------------------|-----------------------------------|----------------------------------------|------------------------------------------|
| Company | Role | Expertise | Contribution |
| Eneco | Business Developer Real Estate | Portfolio development in e-mobility | Validation competitor differentiation |

| Semi-structured internal interviews | | | |
|-------------------------------------|----------------------|--------------------------------------|-------------------------------------------------------|
| Company | Role | Expertise | Contribution |
| Equans e-mobility | Marketing manager | Marketing strategy implementation | Validation of market entry strategy implementation |

Figure 70: Overview of validation interviews

6.1 Customer validation

The main findings regarding customer's motivation to obtain charging infrastructure, needs within a market segment and compatibility of the designs with the market entry strategy were validated through customer interviews. Figure 71 shows which parties were interviewed and what market segment they belong to. The full interview guide and accompanying results can be found in Appendix H.

| Customer validation interviews | | |
|--------------------------------|------------------------------|---------------------|
| Company | Stakeholder type | Market segment |
| Equity Estate | Service provider Investor | Decision influencer |
| Danone | Renter | User |
| Mileway | Real estate manager | Decision influencer |

Figure 71: Parties interviewed for customer validation

Assumptions on use of communication channels were validated. Customers were told Equans is advised to start using LinkedIn, billboards and proposition one-pagers as a result of this project. Customers were asked if these communication channels would help Equans get in touch with them or if other communication channels would be more suitable.

The results in Figure 72 show customers agree with the suggested communication channels. Especially networking in person or through LinkedIn is mentioned as being important. Regarding one-pagers, it is emphasised to start communication with new customers early in the process of obtaining charging infrastructure.

| Validation - Communication channels | | |
|-------------------------------------|---------------------|--------------------------------------------------------------------------------------------------------------|
| Company | Market segment | Answers |
| Equity Estate | Decision influencer | "Lately we use LinkedIn to share our successes" "I don't think equans should have a stand at trade fairs" |
| Danone | User | "I think networking is very important" "You need to be involved very early in the process" |
| Mileway | Decision influencer | "LinkedIn is very important" "Billboards would be seen by us, you could also advertise at gas stations" |

Figure 72: Results validation – Communication channels

Now the desired communication channels are introduced, the designs for them are validated. First, two billboard designs are shown (Figure 73). Customers were asked which billboard they would prefer and why.



Figure 73: Billboards

The results in Figure 74 show most customers found it hard to choose between the posters. It was expected the poster on the right would speak more to decision influencers. The decision influencers did notice that this poster was focused on technical expertise and emphasised a lack of investment and value retention. However, the left poster gave more clarity on the context of e-mobility.

| Validation - Posters | | |
|----------------------|---------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------|
| Company | Market segment | Answers |
| Equity Estate | Decision influencer | "I would choose the one on the right, because it mentions a lack of investment" |
| Danone | User | "They're both good" |
| Mileway | Decision influencer | "I would choose the left one, its clear that one is about e-mobility" "The one on the right grabs my attention and looks technical and professional" |

Figure 74: Results validation – Posters

Finally, the proposition one-pagers were validated. They were both shown to customers, but could not be read entirely within the interview time. Customers were asked which proposition one-pager they were more likely to read in its entirety when presented the two options in Figure 75. Like the billboards, the one on the left was designed for Users, the one on the right was designed for Decision influencers.



Figure 75: Proposition one-pagers

The results in Figure 76 show the left one-pager is perceived as being easier to read. However, all parties liked the title of total unbundling.

| Validation - Proposition onepagers | | |
|------------------------------------|---------------------|--------------------------------------------------------------------------------------------------------------------------------------------|
| Company | Market segment | Answers |
| Equity Estate | Decision influencer | "Total unbundling speaks to me" |
| | | "I believe A-Z expertise will speak to other parties" |
| Danone | User | "I would choose the one about total unbundling, that sounds very attractive" "I would want the blue one whit the text on the green one" |
| Mileway | Decision influencer | "The one on the right is more fun to look at, but the other has better readability" |

Figure 76: Results validation – Proposition one-pagers

This customer validation shows most assumptions on customer motivations and suitable communication channels can be confirmed. Customer motivations, customer journeys and general ways to reach customers were in line with the findings in this project. When validating communication channels for specific market segments, visual language cannot be overlooked. Although the terminology and specific subjects do adhere to the intended segments, colours still draw the most initial attention.

6.2 Internal validation

Alignment with marketing

Aside from customer validation, the main findings were also discussed with internal experts. The design and synthesis phase was done with the involvement of the B2B team. For validation, Equans e-mobility's marketing manager was interviewed (Appendix Q). As the deliverables within the market entry strategy are based on communication tools and how to create brand awareness for Equans B2B, marketing is a suitable expertise for validation. Next to all slides shown to customers, various Brand DNAs, needs within market segments, and competitor propositions were discussed. This resulted in the following conclusions:

- Equans core values and characteristics can be expanded to "professional, technically skilled, enthusiastic, sincere and expert"

- People are important assets within Equans. Everyone is an expert in their own field and takes responsibility for that.
- As Equans is part of a larger corporate, they could offer more than their standard proposition. Batteries, solar panels or software solutions are part of the possibilities they could offer and market as such.
- Equans prefers complicated projects over simple, turnkey solutions. This could be marketed as a USP.
- Adding quotes and example cases to the website could make Equans' branding more personal.
- Equans has focussed solely on a Top-down approach; Bottom-up DMUs offer strategic opportunities.
- Billboards are a desired communication channel, but within the current marketing strategy, they are too expensive.
- Competitors make use of newsletters, this could be a cheap new communication channel for Equans.
- Equans mission statement is only used internally. However, since customers do associate it with Equans' qualities it could be used in external communication.
- 'Carefree' is a popular word within the e-mobility market. However, it implies the risk of worry. Maybe a new term could be introduced.

Aside from this project, Equans e-mobility has started a project to rebrand its visual style. As this project touches upon marketing, communication and visual design, the results will be used as input for this branding project.

Internal validation workshop

The results from the analysis, the market segmentation and the proposal framework were validated internally through a workshop. Appendix J shows all results from this session. The workshop consisted of three parts: a brainstorming session based on a fictional customer case where a proposal needed to be formulated, a presentation of and discussion on the design deliverables, and a discussion on the implementation of the proposal framework.

Brainstorm session

To verify the main points of improvement within the B2B team's way of working, a fictional case, explained in Figure 77, was used to guide a brainstorm on how the acquisition process would go with this specific case.

EcoReal Estate B.V.

Beschrijving: EcoReal Estate B.V. is een bedrijf in commercieel vastgoed dat zich richt op het beheren en verhuren van kantoorpanden en winkelcentra. Hoewel het bedrijf terughoudend is met investeringen in verduurzaming, moet het voldoen aan de Nederlandse wetgeving op het gebied van duurzaamheid.

Oplossingen:

1. **Subsidies en financiering:** Het bedrijf onderzoekt beschikbare subsidies en financieringsmogelijkheden van de overheid en andere instanties om de kosten van verduurzaming te verlagen.
2. **Energieprestatiecontracten (EPC):** EcoReal Estate B.V. sluit energieprestatiecontracten af met gespecialiseerde bedrijven die de verduurzaming uitvoeren en de kosten terugverdienen door de besparingen op de energierekening.
3. **Fasering van investeringen:** Het bedrijf verdeelt de verduurzamingsmaatregelen over meerdere jaren om de financiële impact te spreiden en geleidelijk aan de wetgeving te voldoen.
4. **Samenwerking met huurders:** EcoReal Estate B.V. werkt samen met huurders om gezamenlijke verduurzamingsinitiatieven te ontwikkelen, zoals het delen van de kosten voor zonnepanelen of energie-efficiënte systemen.
5. **Kleine, kosteneffectieve maatregelen:** Het bedrijf begint met kleine, kosteneffectieve maatregelen zoals het vervangen van verlichting door LED-lampen en het verbeteren van de isolatie, die snel rendement opleveren.

Missie: EcoReal Estate B.V. streeft ernaar om op een kosteneffectieve manier te voldoen aan de duurzaamheidswetgeving, door slimme oplossingen en samenwerkingen te benutten die zowel het bedrijf als de gemeenschap ten goede komen.

Figure 77: Fictional case used in internal validation session

With the details from this case in mind, the participants were asked to answer the following questions in a brainstorm:

- How do you get in touch with EcoReal Estate?
- How do you convince EcoReal Estate to choose for Equans?
- What is needed for an optimal commercial acquisition process?
- What aspects of the proposition do you emphasise?

These questions refer to parameters that have been identified in the proposal, like communication channels, positioning in the competitive environment, internal way of working, and how to communicate the proposition towards the customer. The brainstorm led to the following list of subjects that are of importance in the proposal, shown in Figure 78.

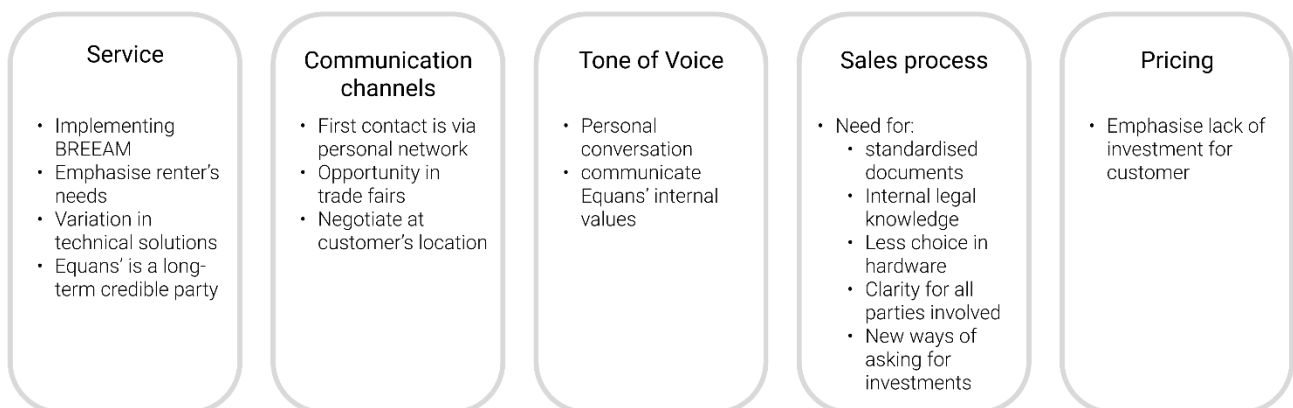


Figure 78: Results from brainstorm

This overview of results validates a need for standardisation within the B2B team, to achieve more clarity and efficiency. In the proposal lay possibilities of incorporating certifications, internal values , and technical solutions, as was also found through customer interviews as customer needs.

Presentation and discussion

Aside from a brainstorm, the market segmentation and customer journeys were discussed with the B2B team. A discussion on the usability of the segmentation and accompanying DMUs resulted in several conclusions that need to be taken into account when implementing the market segmentation in Equans' commercial acquisition process:

- It is not always clear if a customer should be classified as an owner or a user, because some parties use a property and have a mandate to decide on how to develop the property.
- To shift focus from Owners to Users and Decision influencers, the effectiveness of investing time in other market segments needs to be validated. The proposition one-pagers created for this project could be used to initiate contact with new parties without significant investments of time and effort.

Proposal framework review

Finally, the proposal framework was validated within the B2B team. Upon presenting the framework, the following was mentioned:

- It is clear how to read the framework
- The framework is visually clear and understandable
- The framework can be used:
 - o As a personal overview of the AC corporate charging sub-market
 - o As a tool to prepare a first offer to a customer
 - o As a tool to align the goal of a presentation with the B2B team before speaking to a customer

These observations validate the intended usage for the framework: as a tool to create a proposal for a specific customer. Additionally, the team mentioned it could be used internally to align communication towards a new customer. Especially in large projects, many people are involved in creating and presenting a proposal. Aligning communication beforehand could strengthen Equans' persuasive power towards a customer.

6.3 Differentiation from competitors

As mentioned in the analysis phase, differentiation from competitors is an essential part of the market entry strategy. The market entry strategy does this by emphasising Equans' expertise and values, focusing on clearly defined market segments to obtain the desired market share and using Equans' market leader position to make their expertise more credible. To validate these strategic differences, a competitor in corporate AC charging was interviewed. In a conversation with Eneco, market developments and proposition development were discussed (Appendix R).

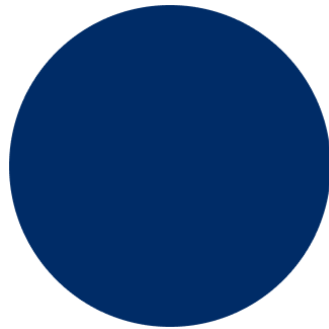
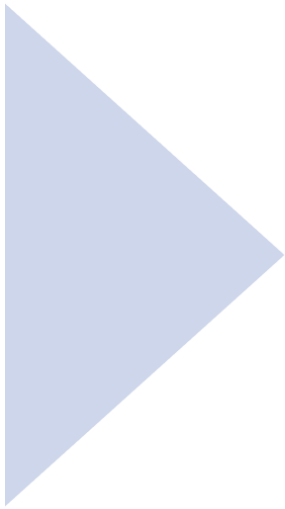
Aside from being a CPO, Eneco is a well-known energy supplier, implying they have resources and knowledge similar to Equans as an 'A-Z CPO'. Although Eneco's biggest company share is currently in private charging, they have adapted their strategy to fit the expected growth in the corporate charging market. This makes them direct competitors in the context of this project.

In the interview it became clear Eneco follows a similar strategy as Equans regarding the diversification of portfolio while mitigating the risk of losing credibility. They diversify by investing in upcoming sub-markets but limit to AC charging in commercial real estate. This underlines the importance of diversifying from competitors in this segment, as more parties have seen the growth potential.

However there is a big difference in the proposals between these two companies. Eneco explained they have chosen not to limit their proposal to either exploitation or turnkey, but to facilitate both depending on a customer's wishes. Their motivation to do this lies in "the complicated interactions between existing real estate, development of the built environment and legislation'. They reason the complicated interactions within commercial real estate require flexibility within their proposition, although they would prefer limiting their business model to one type of contract. Instead of targeting customers based on specific needs and opportunities and selling them a defined proposition they create a proposal for each type of customer.

Although only Eneco could be interviewed for this project, it does show a trend in the e-mobility landscape of diversification of portfolios. This shows how Equans can set itself apart from this strategy by starting from a specific proposal and selling that to broader market segments. This allows them to stick to their internal expertise, without spending extra time on defining a proposal and proposition for a customer based on each specific location.

Conclusion



Conclusions are drawn on the outcome of this project

7. Conclusion

7.1 Conclusion

Throughout this project, an answer was sought to the question:

“How to strategically enter the office charging market within commercial real estate while leveraging Equans’ USPs?”

The accompanying design goal was formulated as follows:

“Design a market entry strategy towards newly defined market segments for Equans E-mobility in the context of business-to-business sales in corporate AC charging”

This has resulted in a market entry strategy and multiple recommendations that Equans can implement. Overall, the answer to the research question lies in a mindset change that can be translated into a broader strategy and accompanying documents: a change from fully customised projects to a parameterised and standardised proposal.

Increasing acquisition efficiency

The term ‘customised project’ refers to the way each new B2B lead is currently regarded as a separate project, requiring tailored communication and documentation even before a business case can be assessed. For each prospective customer, a lengthy process must commence to create a proposal that includes a detailed commercial offer, legal documentation, and an estimated energy volume forecast. This entails an investment of time from various internal teams, while the guarantee of return on investment is identified relatively late in the process. For the customer, this situation also leads to frustration. They often lack the knowledge necessary for accurate business case calculations and are pressured to obtain charging infrastructure by employees, legislation, or internal sustainability goals. The proposal framework, roadmap, and accompanying communication channels established in this project aim to enhance efficiency in the commercial acquisition process through standardisation.

Standardised communication

By implementing the proposal framework, the core proposition remains, but standardised ways of communication are created to adhere towards the specified market segments. The goal is twofold. By standardising documents that are repeatedly created for each new customer the time that needs to be invested in the phase of the commercial acquisition process before the calculated prognosis is shortened. This means more leads can be generated in the time available for members of the B2B team, supporting their intended growth in the upcoming five years. On the other hand, the proposal framework can make the proposition more attractive to the targeted customers. Partly because the redesigned proposal is tailored explicitly towards market segments, therefore adhering to their underlying needs and partly because the processing time from first contact to final offer can be shortened.

Strategic differentiation from B2G

The research into the B2B AC charging context has endorsed opportunities for the B2B team. It shows an upcoming change for an industry that Equans has been a part of since the very beginning. Since that beginning the B2B team and its strategy have grown from the strategy the B2G team has gained their success with. However, as the market matures, so does the Equans e-mobility team and its way of working. To maintain their success while diversifying their portfolio into targeted sub-markets their strategy needs to fit a changing way of working. Although the core values of professionalism, technical skills, enthusiasm and sincerity remain the B2B team will benefit from a new strategy to manage their growth. By viewing the B2B team as a separate business unit instead of a small sub-part of the E-mobility team, room is created for new ways of working and their potential is acknowledged both to customers and Equans.

Standing out from the competitive environment

Not only does this shift in strategy change the way of working within the B2B team, it also suits a changing market surrounding it. Although Equans has an established position as market leader in the public AC charging market, this cannot be directly translated into the corporate AC charging market. Customers, project requirements and lead generation wildly differ from the tender process Equans e-mobility spends 95 per cent of its current resources on. Also, the corporate AC charging market is expected to go through extensive growth in the coming five years. The increase in demand, along with the smaller scale of typical projects in this sub-market makes it an attractive sub-market for both small and large scale competitors to enter. This means the B2B team has to account for a larger amount of competitors than the established players in the B2G market. This project has clarified how Equans B2B can differentiate from competitors while mitigating the risk of diversifying their portfolio too much to communicate their expertise credibly. Keeping the exploitation model as their core proposition sets them apart from most competitors and emphasising their expertise and quality gives them credible value to new customers, especially those lacking knowledge of charging infrastructure and its context. In the past, price has frequently been the reason a competitor was chosen over Equans. By emphasising quality from the beginning of the process and strategically approaching leads based on their specific needs, the final charging price can be substantiated.

7.2 Limitations

Although this project contains extensive research within the corporate AC charging scope, it does have its limitations.

Generalizability

This project focused on the corporate AC charging scope within Equans' B2B team. Although the methods used to form the market entry strategy are grounded in literature and strategy related to this team as a whole, it might not be applicable outside the project scope. The B2B team has multiple sub-markets in their portfolio that require an effort to be addressed suitably. The market entry strategy designed through this project requires changes in working for the B2B team in general, but these ways of working have not been tested outside the corporate AC charging scope.

Data collection

Although the data collected in this project is extensive, it is all of a qualitative nature. All findings are based on literature, interviews and observations. This type of data collection is at risk of being biased by the researcher. In future research, quantitative tests could be done to test the validity of assumptions made on qualitative data.

Sample size

The interviews conducted in this project covered internal experts, external experts, a competitor and possible customers. Although this covers different points of view there might still be bias. All interviews were set up through either the researcher's or mentor's network. This means all interviewees were familiar with this research's scope and involved stakeholders. To mitigate bias it would be desirable to involve qualitative and quantitative data from stakeholders outside personal networks. Especially since the goal of this project is to create a market entry strategy, it would be valuable to assess the point of view of stakeholders in the desired market not yet familiar with Equans.

Design implementation

The designs created as part of the market entry strategy are not all directly applicable within Equans B2B. The billboards that were validated with customers require a financial investment not suitable within the short-term budget. Also, these deliverables support a strategic change where Equans B2B enhances their brand awareness outside of this project's limited scope. Within the roadmap, this is a long-term change that requires efforts from both the B2B and the B2G teams that cannot yet be confirmed to happen.

7.3 Recommendations

As this project has a limited scope several findings could not be elaborated on in this report. However, some leads do seem promising for Equans to look into.

Charging price

As mentioned in the conclusion, price is often a dealbreaker at the end of the commercial acquisition process for Equans. The charging price consists of multiple parts. Among these are energy prices, installation fees, maintenance fees and a profit margin. These parts are not fully predictable and dependent on multiple contracts and uncertainties. It is essential for Equans to calculate a suitable margin on all fees, as their revenue is fully dependent on long-term exploitation. However, these margins seem to work out as a disadvantage for Equans' overall revenue when it stops customers from going into business with them. Especially since the current commercial acquisition process is lengthy and requires various resources before a definite contract, it is worth researching the possibility of lowering the charging price.

Standardisation

The market entry strategy and proposal framework offer some form of standardisation within the scope of the AC corporate charging market. However, the research shows a more considerable need for standardisation in the way of working, commercial acquisition process and marketing. The method used for market segmentation could be applied to other sub-markets within B2B as a start for standardised propositions. Another direct starting point is to further standardise the lay-out for all documents used within the commercial acquisition process. Equans has started this process by collaborating with a design agency to visualise their final proposals and current marketing outings, the results from this project will be used in this process. Expanding this to a coherent visual language across all documents and communication channels would be a valuable contribution to expanding B2B sales.

Market developments – shared cars, e-bikes and biros

Several developments regarding electric mobility have not been considered in this report. In several customer and expert interviews, shared cars, e-bikes and Biros were mentioned as forecasted influences on the (semi)public charging market (Appendix S). Not only do experts and customers expect these will require more infrastructure resources in the future, but they already cause frustration by taking up CPs they are not intended to use. Although CPs specifically adapted for these means of transport require different software and hardware, it might be worthwhile to anticipate these in the long term. Especially in public charging and large-scale B2B projects, the demand for these means of transport increases.

Respond to knowledge gap

From expert and customer interviews, a lack of knowledge of e-mobility in general was prone (Appendix O, Q, S). This results in a higher threshold to obtain charging infrastructure for companies, as they expect it to be more complicated than it actually is. Equans could use their position as market leader with in-house expertise to come over as a credible advisor and teacher for how e-mobility works. This especially adheres to the mass communication

channels mentioned in the market entry strategy. This would improve brand awareness across sectors and positively associate Equans with the convenience of (semi) public charging infrastructure.

Offering service as a separate asset in the proposition

The analysis of the competitive environment showed that many competitors offer their service as a separate asset in their proposition. Equans could put more emphasis on all aspects their service contains within an exploitation contract. Even if they do not offer service separately, highlighting it will make them more relevant in comparison with their competitors. Highlighting the possibility for companies with turnkey CPs to have them taken over by Equans in an exploitation contract could make their service even more appealing to customers who manage charging infrastructure themselves.

Lobbying

Equans e-mobility has already hired a lobbyist to actively participate in the legislative environment surrounding the B2G team. As this research points out, legislation is essential to understand the B2B target market's motivations to want charging infrastructure. Having a lobbyist dive into real estate developments could be very helpful to stay up to date on expected developments.

From project to product thinking

In the conclusion, a strategic use of standardisation and a breakaway from the B2G strategy within the B2B team is mentioned. This change in the way of working could be further elaborated on in future research as a complete culture shift within Equans e-mobility. By making B2B a separate business unit with their own strategy they could implement a whole new way of working. This way they can shift from viewing each customer as a whole new project that needs to be customised towards a set of predetermined propositions they can specify towards a new client. This way, they offer exploitation as a type of product instead of a process.

7.4 Acknowledgements

This report has been compiled from the knowledge gathered through the explicitly mentioned sources and methods; however, some additional sources and tools should be acknowledged.

Research within Equans

Within Equans, several pilots and research projects occur simultaneously. These projects inspired this project, just as this project has inspired them. In addition to this thesis, I was engaged in research on long-term exploitation strategies, data collection, customer journeys, marketing strategies, B2G brand identity, and dynamic pricing. The outcomes from these projects have paved the way for future directions within the B2B team and have formed the foundation of my understanding of Equans and the e-mobility market. As mentioned in Chapter 6.2, the results from this thesis are already used in marketing strategy development and the creation of a brand identity for Equans e-mobility, showing how projects within the company make use of each other's results.

Research conducted on behalf of Equans

Aside from internal research and pilots, Equans also lets external parties conduct pilots or analysis for them. A prior external analysis of the development of sub-markets in Dutch e-mobility and the potential market share for B2B parties in AC charging was used as inspiration for the research conducted in this project.

AI as a tool

AI has been used as a tool for writing in this thesis report. Grammarly was used to check for spelling errors in the report, and Copilot was used to shorten some of the text. AI was not used to write any parts of this report, merely as a final check of what was already written. Aside from text, Copilot has been used as inspiration for brainstorming. For example, the fictional case used in the internal validation session was created by using Copilot.

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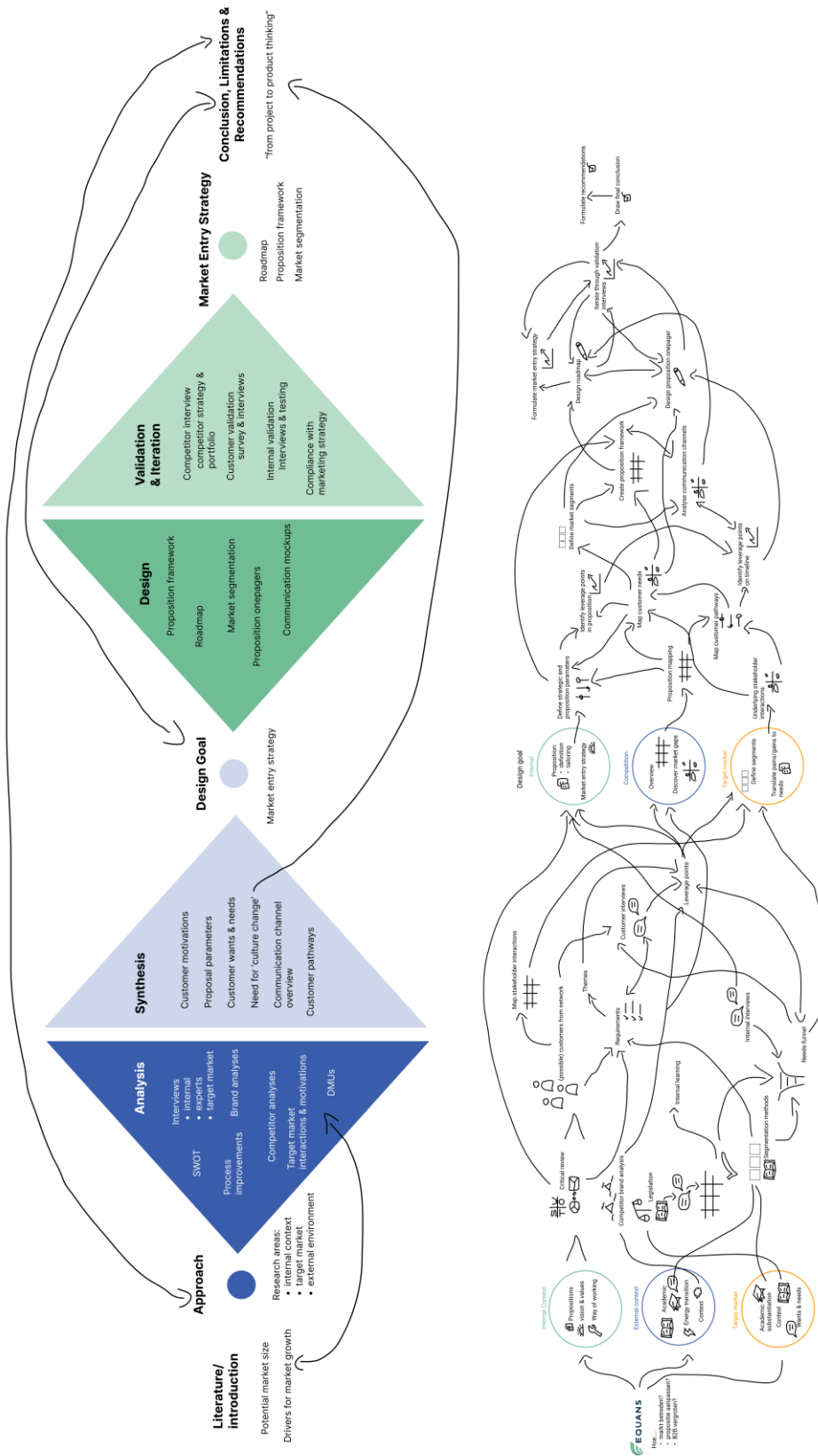
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Appendices

Appendix A – Process visualisation



Appendix B – Provada observations

Interview guide for Provada 2024

- **Uitgangspunt: 5-10 minuten gesprek, to the point zijn**
- **Uitwerken:**
 - **In spraakmemo, Whisper laten vertalen Of notities in schrift/telefoon.**

Wat is uw rol in de vastgoedmarkt? (belegger/eigenaar, beheerder/manager, adviseur)

Heeft u laadinfrastructuur bij uw huidige vastgoed?

- Ja: Op welke manier is de laadinfrastructuur georganiseerd? Is **dat uitbesteed of in eigen beheer**?
 - Hoe bevalt dit? Waarom wel/niet?
 - (Bij ervaring met uitbesteden aan concurrenten: lief doch indringend doorvragen)

Bent u **op zoek naar (aanvullende) laadinfrastructuur**?

- Waarom wel of niet? (wetgevend ingegeven, vraag vanuit huurders, intrinsieke motivatie)

Wat zijn in uw ogen de voor- en nadelen van organisatie in eigen beheer (belegger/beheerder)?

Wat zijn in uw ogen de voor- en nadelen van uitbesteden / exploitatie door derden?

UITDAGINGEN

- Als we het hebben over uitbesteding, **waar wilt u met name in ontzorgd worden**? Hoeveel waarde hecht u aan de volgende elementen:
 - (Vermijden van) capex investering
 - Uptime (vermijden van downtime)
 - Contact met huurders bij storingen
 - Slim laden op een krappe netaansluiting
 - Vergoedingsvorm (iets aan overhouden, gecompenseerd worden voor tijdsinvestering of ontzorgd worden)
 - 24/7 beheer van laadinfrastructuur (en beschikbare monteurs)

Zou u een vergoeding verlangen voor het beschikbaar stellen van uw commercieel vastgoed aan een laaddienst exploitant (CPO)? **BEHOEFTE**

- Welke vorm zou uw voorkeur hebben?
 - Geen vergoeding – zo laag mogelijk laadtarief voor de huurder
 - Onkosten vergoeding is voldoende – bijvoorbeeld administratiekosten per centage op het energietarief
 - Eenmalige vaste vergoeding – prijs per geplaatst laadstation
 - Variabele vergoeding – bijvoorbeeld 2 cent per kWh

Overig/nader te bepalen

- Bekendheid met CPO/Equans

Uitwerken – neem deze vragen over en vul ze (waar mogelijk) in

Naam van de partij (en contactpersoon) :

Welk type partij is dit? (belegger/eigenaar, beheerder/manager, adviseur)

Heeft de partij al laadinfrastructuur?

hoogte)

(ja/nee/niet van op de

Is dat uitbesteed of in eigen beheer? (In eigen beheer/uitbesteed)

Aan welke partij(en) is dit uitbesteed? (partij x/y/z)

Zijn er op- of aanmerkingen over de huidige partijen? (tevredenheid, USP's, dingen die opvallen, dingen die missen)

Waar wil de partij met name in ontzorgd worden?

Staat de partij open voor (aanvullende) laadinfrastructuur? (ja/nee/onduidelijk)

Wat vindt de partij van onze propositie?

Welke elementen vind de partij belangrijk? (Vermijden van) capex investering
 Uptime (vermijden van downtime)
 Contact met huurders bij storingen
 Slim laden op een krappe netaansluiting
 Vergoedingsvorm (iets aan overhouden, gecompenseerd worden voor tijdsinvestering of ontzorgd worden)
 24/7 beheer van laadinfrastructuur (en beschikbare monteurs)

Welke vorm vergoeding zou de partij willen? Geen vergoeding – zo laag mogelijk laadtarief voor de huurder
 Onkosten vergoeding is voldoende – bijvoorbeeld administratiekosten per centage op het energietarief
 Eenmalige vaste vergoeding – prijs per geplaatst laadstation
 Variabele vergoeding – bijvoorbeeld 2 cent per kWh

Zijn er vervolgstappen afgesproken?
Waren er nog opvallendheden?

➤ **Main focus is to speak to owners and developers**

Notes from interviews with companies at the fair

Company 1

Welk type partij is dit? (beheerder)

Heeft de partij al laadinfrastructuur?
 nee, zijn alleen tussenpartij voor eigenaren

Waar wil de partij met name in ontzorgd worden?

Staat de partij open voor (aanvullende) laadinfrastructuur? Onduidelijk, ze vonden de pitch wel interessant maar benadrukten vooral een tussenpartij te zijn

Wat vindt de partij van onze propositie?

Onze expertise als marktleider, technologische ontwikkelingen, overname van investering en volledige ontzorging klonken interessant

"klanten hebben spreadsheets" > willen harde cijfers en concrete voorstellen om ons zo aan de juiste partijen te verbinden

Welke elementen vind de partij belangrijk?

(Vermijden van) capex investering
Contact met huurders bij storingen
Slim laden op een krappe netaansluiting
(geïnteresseerd in technologische innovaties)
ontzorgd worden
24/7 beheer van laadinfrastructuur (en beschikbare monteurs)

Welke vorm vergoeding zou de partij willen?

Variabele vergoeding – bijvoorbeeld 2 cent per kWh, willen kosten wegnemen voor klanten, niet voor eindgebruikers

Zijn er vervolgstappen afgesproken?

Over twee weken contact opnemen (namens de TU studente dan weet die het wel weer zei die). Ik heb gezegd dat we graag een BuCa voorleggen aan hem of partijen waar we namens hen aan gekoppeld zouden kunnen worden

- Mogen zeker benaderen: expertise benadrukken en kosten (overname) concreet noemen!

Waren er nog opvallendheden?

- Was kritisch (wel leuk, vooral omdat ik student ben denk ik)

Company 2

Probeer nog een keer langs te komen om iemand van asset management te spreken

Vond het "spannend" maar wel interessant, duurzaamheid leek niet echt een prio maar wel interessant

Company 3**Welk type partij is dit?**

Investeerder, ze financieren alleen vastgoed maar hebben zelf niks met de ontwikkeling te maken

Heeft de partij al laadinfrastructuur?

niet van op de hoogte

Waar wil de partij met name in ontzorgd worden?**Staat de partij open voor (aanvullende) laadinfrastructuur?**

onduidelijk

Wat vindt de partij van onze propositie?**Zijn er vervolgstappen afgesproken?**

mailen met info en verzoek met of we een geschikte contactpersoon kunnen krijgen

Waren er nog opvallendheden?

Heeft uitgelegd hoe bank algemeen werkt: financieren projecten van klanten en beoordelen haalbaarheid. Duurzaamheid en energie kan hierin een factor zijn. Snapte de BuCa niet helemaal, want wij zijn zelf geen vastgoedpartij maar willen daar wel graag mee in aanraking komen. Is zeker bereid ons naar de juiste partij te sturen, waarschuwd voor vastzitten in systeem dus wil ons liever met duidelijk verhaal in 1x naar de juiste partij sturen.

Company 4

Naam van de partij (en contactpersoon): Vesteda - Gesproken met commercie en asset management/operations

Welk type partij is dit? beheerder

Heeft de partij al laadinfrastructuur?

ja

Is dat uitbesteed of in eigen beheer?

uitbesteed

Aan welke partij(en) is dit uitbesteed?

WeDrive Solar, in

raamovereenkomsten. Ze verhuren parkeerplekken en deze partij fixt dan ook auto's in hetzelfde contract.

Zijn er op- of aanmerkingen over de huidige partijen?

Onze ontzorging en slim laden missen bij de huidige partij

Waar wil de partij met name in ontzorgd worden?
doorlooptijd van offerte)

Hele proces (wilden ook snelle

Staat de partij open voor (aanvullende) laadinfrastructuur?

(nee/onduidelijk)

Wat vindt de partij van onze propositie?

Welke elementen vind de partij belangrijk?

Contact met huurders bij storingen
Slim laden op een krappe netaansluiting
Vergoedingsvorm (iets aan overhouden, gecompenseerd worden voor tijdsinvestering of ontzorgd worden
24/7 beheer van laadinfrastructuur (en beschikbare monteurs)

Welke vorm vergoeding zou de partij willen?

Geen vergoeding – zo laag mogelijk laadtarief voor de huurder

Wist wel wat prijzen van concurrenten waren, hier is tarief dus wel erg belangrijk (maar wist niet dat verschillen in publieke sector bijvoorbeeld ook erg groot zijn tussen steden)

Zijn er vervolgstappen afgesproken?

Waren er nog opvallendheden?

Willen een standaard proces zien, van berekening van gebruik tot installatie tot tarief voor gebruiker. Wilde tarief specifiek weten (maar was niet helemaal bewust van de grote verschillen binnen Nederlandse energiecontracten). Toen ik wees op online tool en standaard offerte was dat dus precies wat hij bedoelde. Een doorlooptijd van twee weken klonk ook goed (dit benadrukken, b2b quickscan is hier interessant!)

Algemene indruk: niet heel erg open, maar wel geïnteresseerd in onze USP's. Geen contactgegevens kunnen krijgen en weet niet hoe serieus hij me nam. Zag het meer als marktonderzoek dan potentiële samenwerking.

Company 5

Welk type partij is dit?

Ontwikkelaar en beheerder

Heeft de partij al laadinfrastructuur?

Hebben nu platform haylee

(?) van PON(?)

Is dat uitbesteed of in eigen beheer?

uitbesteed

Aan welke partij(en) is dit uitbesteed?

(PON, maar dus

onduidelijk, nu nog een klein aspect van de projecten die ze doen)

Zijn er op- of aanmerkingen over de huidige partijen?

Nu niet heel bewust mee bezig

Waar wil de partij met name in ontzorgd worden?

Heeft zelf geen technische kennis

(en geen kennis van wetgeving)

Staat de partij open voor (aanvullende) laadinfrastructuur?

ja

Wat vindt de partij van onze propositie?

Welke elementen vind de partij belangrijk?

ontzorgd worden
24/7 beheer van laadinfrastructuur (en
beschikbare monteurs)

Welke vorm vergoeding zou de partij willen?

Geen vergoeding – zo laag mogelijk
laadtarief voor de huurder

Besteden huidige buca's al uit, willen volledig ontzorgd worden (medium tevreden met huidige partij). Laag tarief voor bewoners is het belangrijkste, momenteel is vergoeding voor hebzelf relatief zo klein dat het niet heel veel uitmaakt

Zijn er vervolgstappen afgesproken?

Wij contacteren ze, benieuwd naar technische kant van operations, vanaf wanneer worden wij meegenomen in proces? Garage vaak al gebouwd en uitbesteed aan andere partij

Waren er nog opvallendheden?

Gaan vanaf september vol inzetten op familiewoningen op grote schaal

Staan zeker open voor nieuwe partners! Willen BuCA horen

Company 6

Enthousiaste man, vond mn pitch goed. Op hun site moeten we kijken naar b-right. Zij zijn operations en gaan hierover (op de beurs staat alleen sales van studenten- en vluchtelingencomplexen)

Company 7

Welk type partij is dit?

adviseur

Heeft de partij al laadinfrastructuur?

Ja, bij sommige projecten

is dit al het geval, niet per se iets waar ze vaak/bewust mee bezig zijn

Is dat uitbesteed of in eigen beheer?

uitbesteed

Aan welke partij(en) is dit uitbesteed?

Wisten ze niet (geen

standaard proces in elke opdracht)

Zijn er op- of aanmerkingen over de huidige partijen?

Waar wil de partij met name in ontzorgd worden?

Het hele proces, hebben zelf geen

kennis hierover

Staat de partij open voor (aanvullende) laadinfrastructuur?

(ja, moeten nog wel de

juiste contactpersoon vinden hiervoor denk ik

Wat vindt de partij van onze propositie?

Interessant, fijn om in hele

proces ontzorgd te worden en al vroeg meegenomen te worden bij het ontwikkelen van vastgoed

Welke elementen vind de partij belangrijk?

(Vermijden van) capex investering
Uptime (vermijden van downtime)
Vergoedingsvorm (iets aan overhouden,
gecompenseerd worden voor tijdsinvestering of
ontzorgd worden
24/7 beheer van laadinfrastructuur (en
beschikbare monteurs)

Welke vorm vergoeding zou de partij willen?

Eenmalige vaste vergoeding – prijs per geplaatst
laadstation

Zijn er vervolgstappen afgesproken?

Waren er nog opvallendheden?

Vond het interessant, maken volledige plannen en begeleiden soms ontwikkeling. Had nu toevallig een case waarbij dit speelde maar geen technische kennis. Ontzorgen en volledige overname van dit soort projecten (zonder eigen investering) klonken interessant.

Ze heeft mijn gegevens en zou contact opnemen, zelf ook nog even achteraan gaan met concreet voorbeeld. Zou ook een goede brug zijn naar directe klanten!

> Ik heb inmiddels een mail gekregen

Company 8

Wij nemen contact op, nog erg koud. Laat een concrete BuCa zien en wat voor soort klanten we willen

Jong bedrijf, eerste keer op deze beurs. Verkopen en beleggen onder de radar (vrij high-end lijkt het). Vonden het 'as a service' interessant als extra usp voor klanten. Zouden ook een mooi bruggetje zijn naar andere partijen die wel ontwikkeling doen. Waren redelijk enthousiast, iig open voor gesprek.

Company 9

Bekend met laadinfrastructuur, werken al samen met vijf andere partijen (Batenburg, Joulz...)

Staan nu niet open voor nieuwe partij. Zouden laadpalen willen kopen, huidige partijen bieden alleen huurovereenkomst aan

Company 10

Waren enthousiast. Doen advies en begeleiding van ontwikkeling, helemaal op duurzaamheid gefocust. Komen zeker in aanraking met laadinfra. Zowel bij nieuwbouw als renovaties.

Zeker nog een keer langsgaan om iemand in projectontwikkeling te spreken

EPBD 4 wet voor nieuwbouw?

Company 11

Met dame gesproken die verwees naar Albert, Gaat over laad infra bij oa kantoren. Voor winkels geldt dat er slechts 1-2 parkeergarages in het portfolio zitten en dat die verhuurd worden aan Qpark met hun partners.

Company 12

Relevant contactpersoon helaas afwezig, contactgegevens verkregen:

Company 13

Woningen en winkels

Hebben meerdere aanbieders, waaronder Dutch charging

Mogen er zelf niet aan verdienen (?), dus dat is geen behoefte

Later langskomen

Company 14

Versnipperd landschap, laadinfra

Eerste keer dat ze dit type uitbesteding doen

XX noemt locatie naast XX, glazen gebouw met 450 parkeerplaatsen

Met name multi tennant is aanleiding, wirwar voorkomen en overzicht creëren.

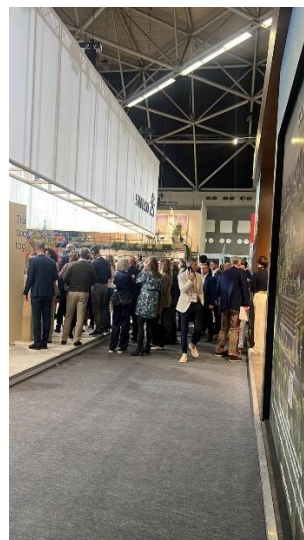
Company 15

is grond aankoop/verkoop begeleider, geen vastgoed beheerder. Richten zich met name op woningbouw. Geen match.

General observations

Provada was a very large trade fair where I spent two full days, one of which was on my own. The notes from companies 1 to 10 were obtained solely by me; the other notes were gathered on the day I spent together with colleagues from the B2B team. Aside from possible new leads that were initiated at the fair, I gained a general view of the way of working in real estate:

- Men dominate the real estate market. As a woman, I felt as if I was not taken seriously. Only after I convinced people of my technical knowledge and involvement in charging infrastructure within real estate were people open to networking with me. My male colleagues had different experiences than me and felt less obstruction to network.
- Personal network is essential to generate leads within real estate. It was challenging to create new connections, even at a networking event.
- Companies in real estate are heavily profit-focused. Before elaborating on Equans' proposition, profit margin and charging price need to be discussed.
- Communication is kept very professional. People wear business smart attire, hand out traditional business cards, and like to plan introductions rather than talking spontaneously.
- Sustainability is often viewed as a trend or an inconvenience. Without clear financial or legislative benefits, most are not interested in sustainable development.



Appendix C – Competitor Brand DNAs

Purpose

Offering a solution for everybody

Positioning

For all types of customers, Eneco is a CPO that offers a suitable charging solution so customers can always travel with a fully charged battery.



Personality

professional, commercial, sleek

Purpose

Be the first on the market to offer a solution for storage and usage of sustainable energy in a car battery within a local energy system

Positioning

For governments, network operators and car companies, We Drive Solar is a CP producer that offers a pioneering solution for sustainable energy usage in a local system so customers can make use of bidirectional charging.



Personality

Friendly, pioneer, technical

Purpose

Carefree electric driving



Positioning

For companies and el-drivers, Vattenfall is a CPO that offers easy and affordable charging so customers can enjoy a good service, because Vattenfall is fully devoted to electric driving.

Personality

friendly, professional, corporate

Purpose

We make electric driving easy for you



Positioning

For corporate fleets, van Kessel is a CPO that offers professional and customised charging solutions, so customers can electrify their fleet because van Kessel takes over the whole process.

Personality

Corporate, informative, unburdening

Purpose

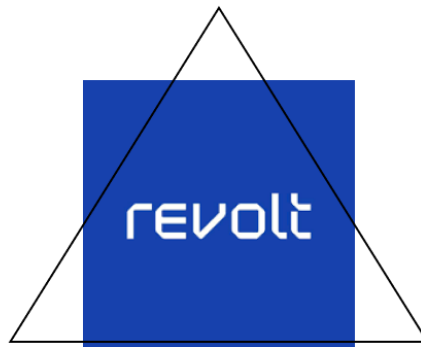
Accelerate to 100% clean roads

Positioning

For sustainable drivers, Revolt is a CPO that offers sustainable forms of transport so customers can have access to energy for clean mobility, because Revolt urges customers to accelerate the transition to clean mobility.

Personality

Modern, ambitious



Purpose

Quick, easy and guaranteed green charging

Positioning

For real estate owners, PowerGo is a CPO that offers management and installation of CPs so customers will be totally unburdened, because PowerGo has everything to make charging an electric fleet efficient and sustainable.

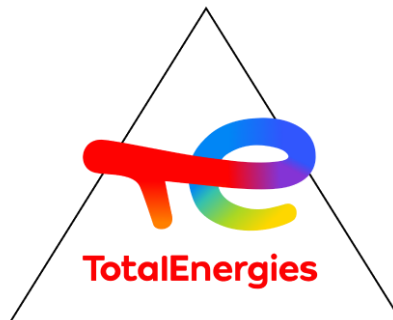
Personality

Professional, sustainable, modern



Purpose

Carefree charging everywhere



Positioning

For companies, TotalEnergies is a CPO that offers easy, emission-free charging so companies and employees can charge carefree and as easy as possible.

Personality

Sleek, professional, impersonal

Purpose

Offering independent, reliable and safe services so customers can always charge



Positioning

For their partners, Allego is a CPO that offers reliable, simple, and affordable charging solutions, so customers can charge their electric vehicle anywhere at any time, because Allego wants to accelerate the transition towards sustainable mobility.

Personality

Friendly, sleek, corporate

Appendix D – Interview guide customer interviews

Praktische info:

Mag ik dit gesprek laten transcriberen?

Wat is je functie?

(Wat is de relatie/geschiedenis tussen Equans e-mobility en [bedrijf]?) – van te voren checken

Wat voor partij is [bedrijf]? (beheerder/ontwikkelaar/huurder/eigenaar/adviseur/etc.)

Pains & Gains

Wat is jullie huidige situatie mbt laadinfrastructuur?

Is dat in exploitatie? (zo ja, bij wie?)

Hoe tevreden bent u als adviseur daarover?/ Hoe tevreden zijn uw klanten of opdrachtgevers daarover?

En waarom wel of niet voor exploitatie gekozen?

Wat zou u nu willen veranderen?

Thema's & trends

Wat waren jullie redenen om laadinfra te faciliteren?/Wat waren de redenen van uw klanten om laadinfra te faciliteren?

Belang van duurzaamheid (intrinsieke motivatie of imago verbetering?)/(BREEAM) certificering/wetgeving/etc.

Welke rol speelt duurzaamheid in de ontwikkeling van uw organisatie?

Netcongestie/energietransitie/stikstofproblematiek/verduurzaming bouw en wagenpark

Komt dat overeen met de algemene visie hierop in de vastgoedwereld/commercial real estate?

Welke rol heeft wetgeving op de verduurzaming van uw panden?

BREEAM/Energielabel C op kantoren/The Green deal/corporate sustainability reporting/MMIP/LEED/RED III

Kanalen

Hoe begint bij jullie het proces van het verzorgen van laadinfrastructuur?

Gaat dat via een tenderproces? Of besloten aanvraag aan de markt?

Waarom zou een tenderproces gewenst zijn voor jullie?

Hoe zet je een tender/besloten aanvraag in de markt?

Hoe zijn jullie bij de huidige exploitant of installateur terecht gekomen?

Decision making unit

Kunt u me meenemen in het proces van het kiezen van een partij die laadvoorzieningen voor u faciliteert?

Wie zijn betrokken in de keuze? En wie moeten geconsulteerd worden voor er een beslissing gemaakt kan worden?

Wie maakt de eindbeslissing in dit proces?

Hoe lang bent u in contact met een exploitant/laaddienst aanbieder voor er een beslissing gemaakt kan worden?

Propositie

Kunt u de volgende propositie-aspecten op volgorde van belang zetten?

Laadprijs/het aanbieden van een laadprijs

Aantal laadpunten dat geïnstalleerd wordt

HBE subsidies

Circulariteit

(Doorlooptijd)

Back-office systeem/inzicht in verbruik en prestaties van laadplein

Uptime/betrouwbaarheid van de laders

Kwaliteit van de installatie

Balanceren van energieverbruik met het pand (slim laden)

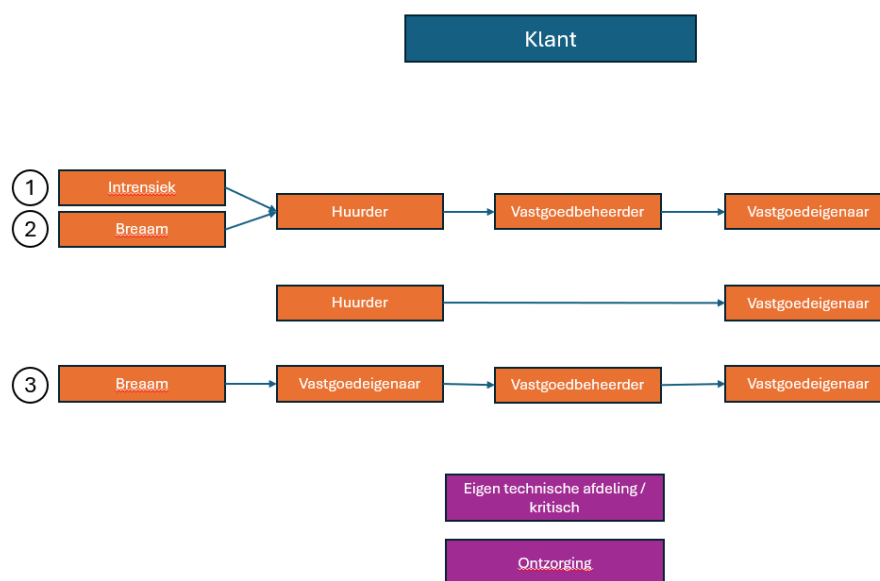
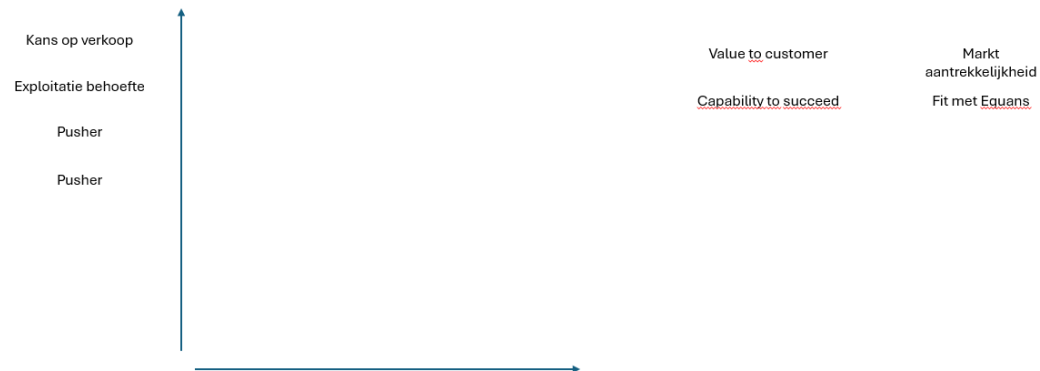
➤ Prijs/eindgebruiker/duurzaamheid/techniek

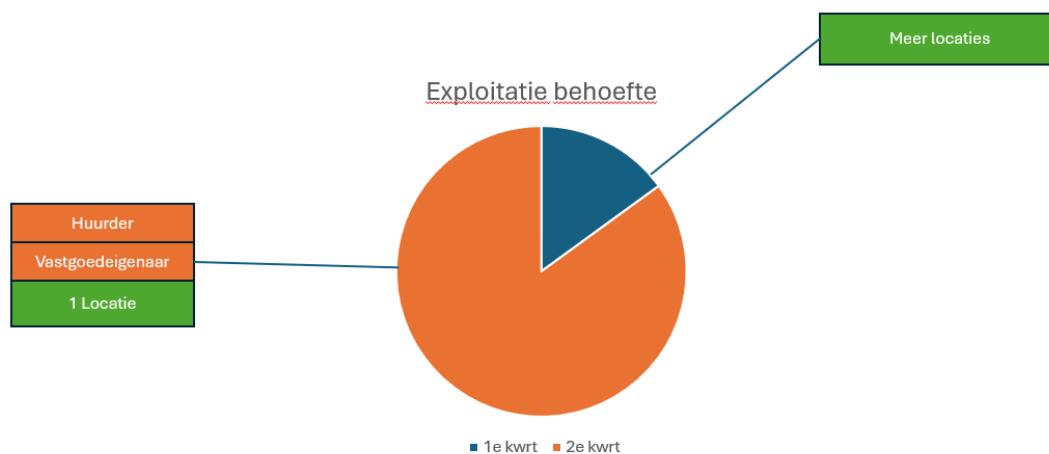
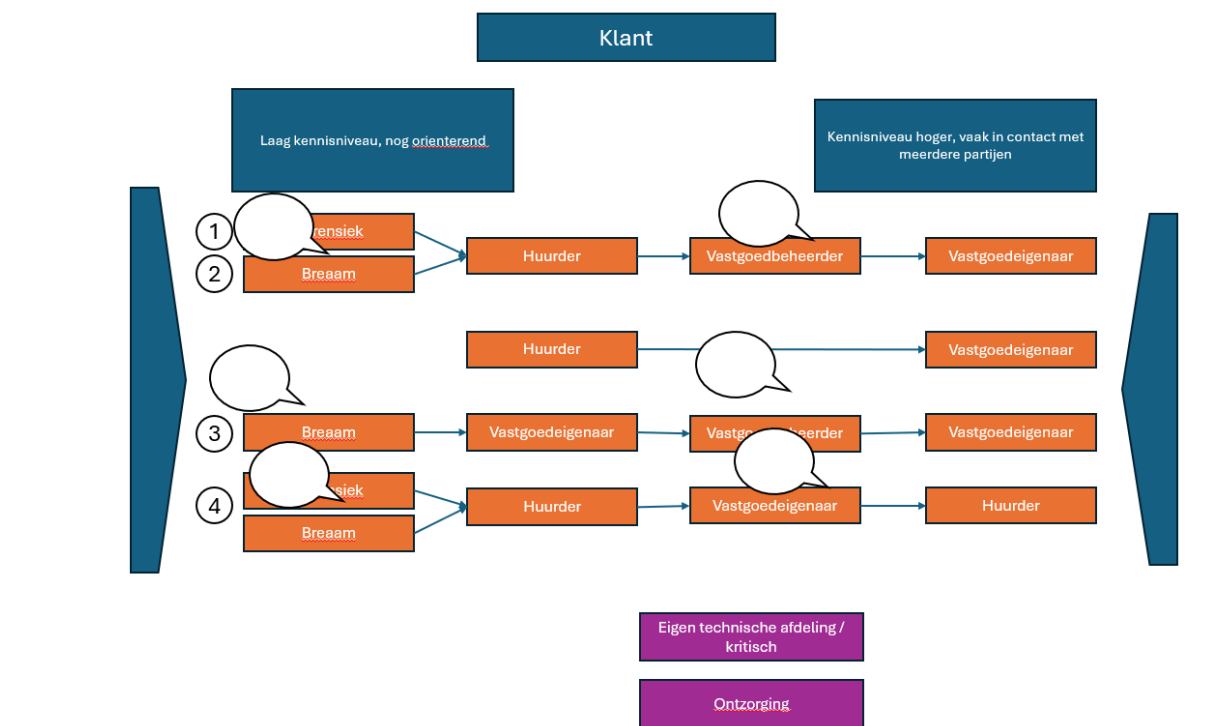
Waarom zijn bepaalde aspecten belangrijker dan anderen?

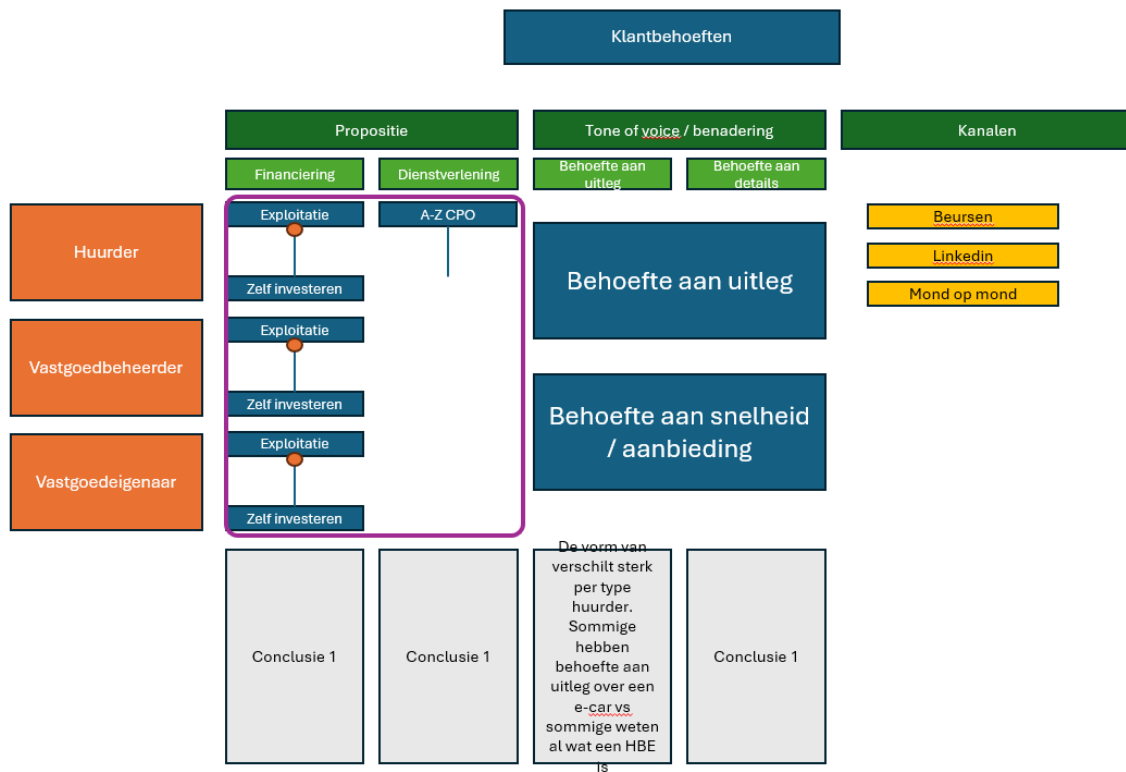
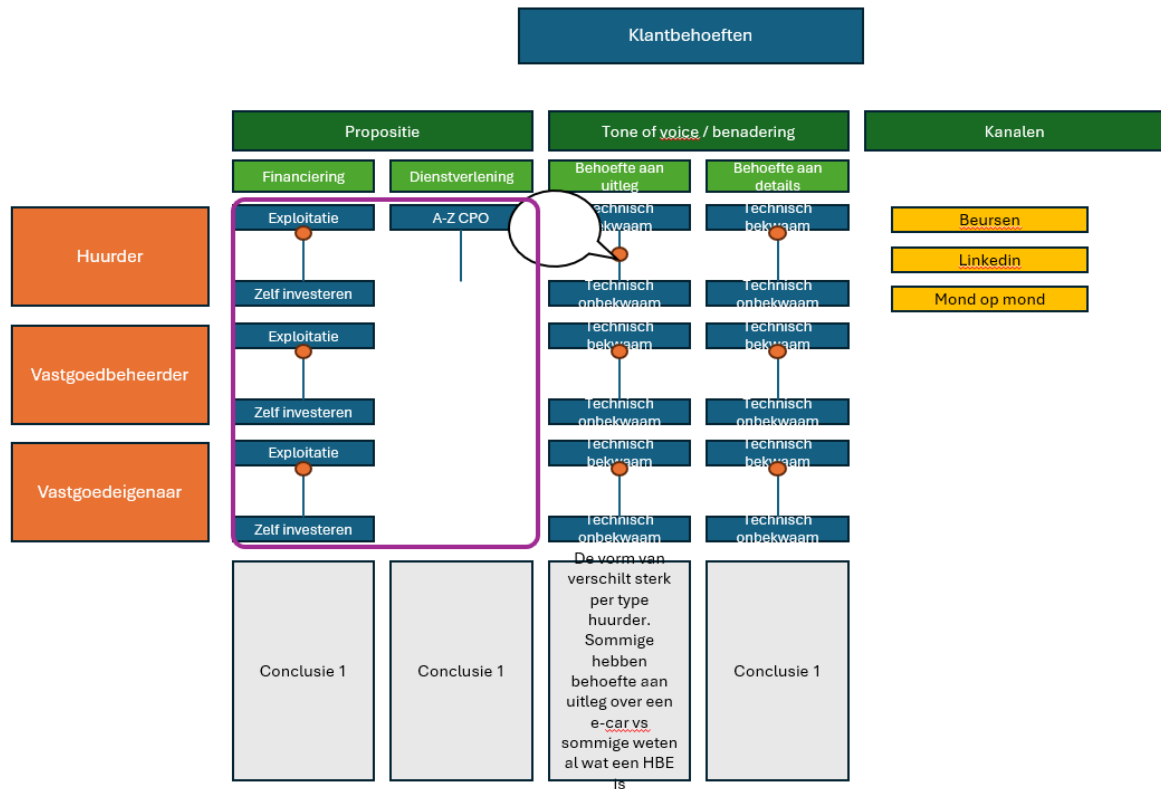
(noteer: waar heeft partij kennis van?)

Ben ik aspecten vergeten van laadinfra en beslissing daaromtrent die voor jullie van belang zijn?

Appendix E – Brainstorm B2B manager



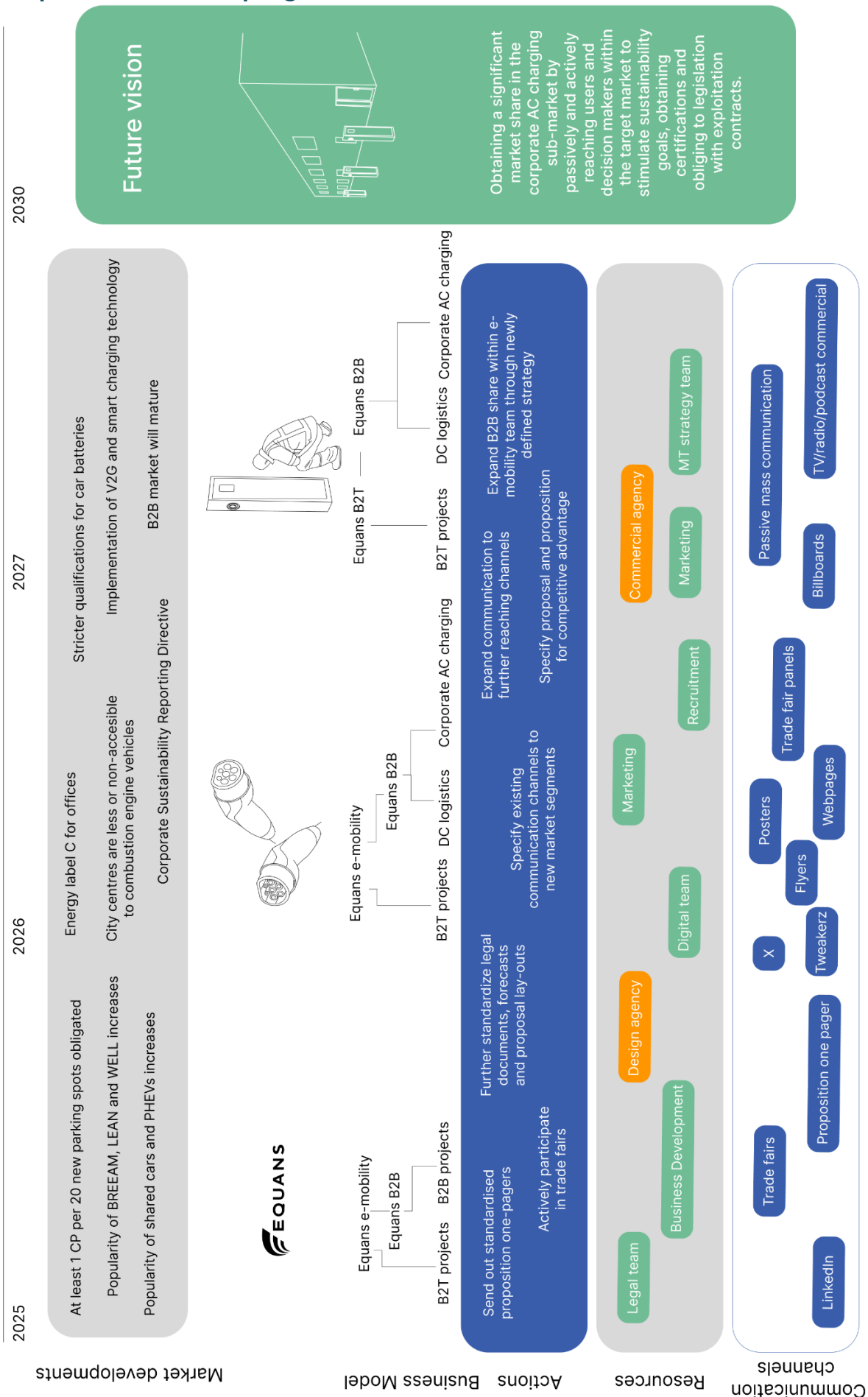


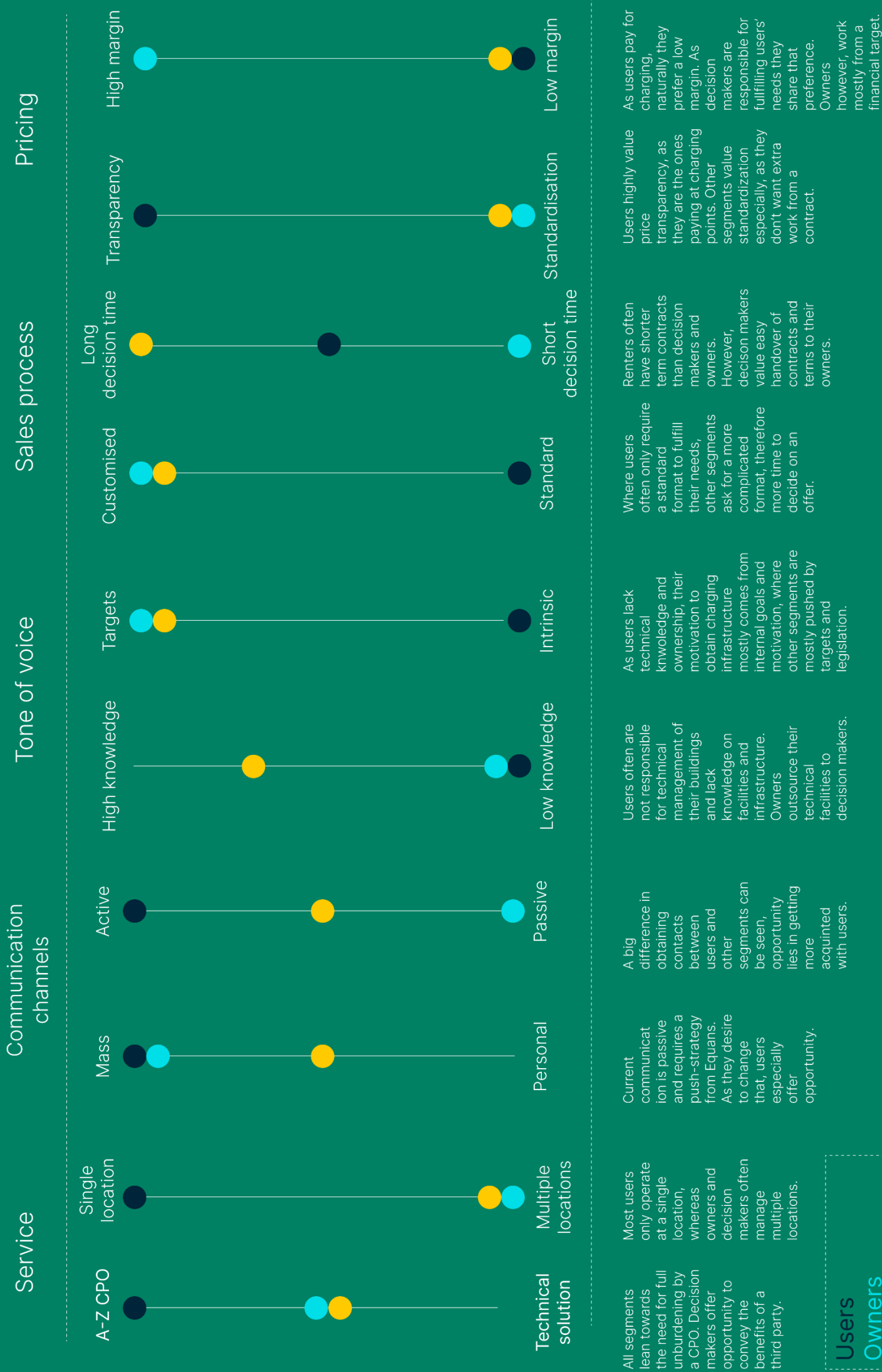


Appendix F – Communication channel costs

| Soort en tijdstip | Leefstijl doelgroep | Middel | Toelichting | Bereik | Kosten |
|------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------|----------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------|
| Gevestigde gezinnen Gepensioneerden Stedelijke forenzen Stedelijke gezinnen | 50-64 (28%) 65+ (49%) | Eindhovens Dagblad, 1/2 pagina doordeeweeks | 23 gemeenten, Zuid-Oost NL veel lokale sport | 176.000 196.000 op zaterdag | 5823,43/€ 7.425,09 |
| Gevestigde gezinnen Gepensioneerden Stedelijke forenzen Stedelijke gezinnen | 50-64 (28%) 65+ (49%) | Mezza (weekendblad Eindhovens Dagblad), 1/2 pagina | Meer focus op reizen, 73 % lezers is midden/hoog opgeleid | 1.027.000,00 | € 35.706,25 |
| Gevestigde gezinnen Gepensioneerden Stedelijke forenzen Stedelijke gezinnen | 50-64 (30%) 65+ (44%) | Brabants Dagblad, 1/2 pagina | 62% midden/hoog inkomen, 77% midden/hoog opgeleid, Het verspreidingsgebied omvat onder meer 's-Hertogenbosch, Tilburg en de daaromheen liggende regio's | 188.000/ 232.000 op zaterdag | 7145,3/ € 9.432,47 |
| Gevestigde gezinnen Gepensioneerden Stedelijke forenzen Stedelijke gezinnen | 50-64 (26%) 65+ (57%) | BN DeStem, 1/2 pagina | gevestigd in Breda. De krant en site richten zich op westelijk Noord-Brabant en Zeeuws-Vlaanderen, in het weekend Mezza | 128.000/ 163.000 op zaterdag | 4416,86/€ 6.097,19 |
| Gevestigde gezinnen Gepensioneerden Stedelijke forenzen Stedelijke gezinnen Starters | <35 (48%) 35-49 (19%) 50-64 (22%) 65+ (12%) | Podcast | | 1.000 - 100.000 | 15 - 10.000 |
| Stedelijke forenzen Starters Stedelijke gezinnen | | Podcast Boekstijn en de Wijk, BNR | geopolitiek/actualiteiten, 7 in toppodcasts NL | 460.000 downloads /week in 2022 | 10.000 (?) |
| Starters Stedelijke forenzen Gevestigde gezinnen Stedelijke gezinnen Gepensioneerden Plattelandsbewoners | 20-49 (49,8 in 2019) | | doelgroep voor zakelijke campagnes nam eveneens toe: van 215 vorig jaar naar 243 in de meest recente NLO-meting. Maar BNR is meer dan B2B alleen! Dit zien we duidelijk terug in een verstevigde positie in doelgroepen als Hoger opgeleiden, AB1 en Hogere inkomens. | 470.000 | 3.000 (5 werkdagen 5 keer/dag 10 sec.) |
| Gevestigde gezinnen Stedelijke gezinnen Gepensioneerden Plattelandsbewoners | 50 - 65+ | TV spot kleine TV zender uitzenden | 6x tussen 18:00 en 00:00, kosten variëren per zender | 250.000 - 750.000 | € 7.500 |
| Gevestigde gezinnen Stedelijke gezinnen Gepensioneerden Plattelandsbewoners | 50 - 65+ | TV spot grote TV zender uitzenden | 4x tussen 18:00 en 00:00, kosten variëren per zender | 2.000.000 - 5.000.000 | € 50.000 |
| | | Productie TV-reclame | (korte animatie) | 250.000 - 750.000 | € 2.500 |
| Starters Stedelijke forenzen Stedelijke gezinnen Gevestigde gezinnen | 20-50 | Google adverteren | Kosten verschillen per aantal kliks/zoekwoorden, bereik is lokaal in te stellen | max. 1000 targetlocaties + radius | 200-3000/maand |
| Starters Stedelijke forenzen Stedelijke gezinnen Gevestigde gezinnen | 18-34 (19%) 35-54(38%) 55+ (42%) | Adverteren op NU.nl | Regionaal target in te stellen, 60% is man, 31% gezinnen 42% tweepers. Huishoudens, 22% alleenstaand | 5.684.000 | vanaf 100 starttarief |
| Starters Stedelijke forenzen | | Adverteren op Buienradar app | groot bereik, lokaal gebruikt en dagelijks bekeken | 125.000.000 maandelijks bezoeken | 1 Euro / 1000 weergaven (premium) |
| Stedelijke forenzen Starters | | Flitsmeister | Locatiegestuurd adverteren, doelgroep krijgt advertentie na rit langs vooraf bepaalde locatie | 2,6 miljoen gebruikers | |
| Gevestigde gezinnen Stedelijke gezinnen Stedelijke éénpersoonshuishoudens | | Adverteren op Marktplaats | Adverteren en direct doorsturen naar website, bepaal vooraf (maandelijks) budget. Met name de automotive markt laat zien hoe je aanwezigheid op Marktplaats veel op kan leveren als het gaat om leads. Volgens de site gaan er dagelijks maar liefst 72.000 leads richting autobedrijven. Het gaat daarbij om e-mails, websitebezoeken en telefoontjes. | maandelijks 8,2 miljoen unieke bezoekers, per dag zijn dat er bijna 1,3 miljoen | vanaf 1 cent/klik |
| Gevestigde gezinnen Stedelijke gezinnen Stedelijke éénpersoonshuishoudens | | Adverteren op Facebook | Facebook staat bekend als een van de goedkopere advertentieplatforms. Adverteren op Facebook is vaak een aantrekkelijke optie voor bedrijven met een beperkt marketingbudget. In vergelijking met platformen zoals Google Ads of LinkedIn zijn de kosten voor Facebook adverteren meestal lager. | | merkbekendheid (4Euro/ 1000 weergaves) websiteverkeer (200 Euro/1000 kliks) leadgeneratie (1500Euro/1000lead s) |
| Stedelijke forenzen Gevestigde gezinnen Stedelijke gezinnen Stedelijke éénpersoonshuishoudens Starters Gepensioneerden | | Abri's (in Eindhoven) | Met reclame op abri's maak je hoe dan ook impact, meer dan 80% van de passanten zal je boodschap zien, dit geeft een enorme boost aan je naamsbekendheid. | 100 abri's 2 weken - 12.500 400 abri's 2 weken - 51.500 | 80% van passanten |

Appendix G – Roadmap, Proposal framework, and proposition one-pagers





Equans e-Mobility: A-Z expertise in duurzame laadpleinen

Zorgeloze realisatie van een laadplein voor uw werkplek

Technische expertise

Als marktleider in publieke AC laadpalen heeft Equans alle technische kennis in huis om uw laadplein te realiseren en onderhouden. Van installatie tot technisch onderhoud en software platforms, wij nemen alles van je over.

Duurzame oplossing

Duurzaamheid is één van onze kernwaarden bij Equans. De stroom in onze publieke laadpalen is 100% afkomstig van duurzame bronnen, we bieden refurbished laadpalen aan en kunnen uw energieverbruik verminderen met onze slim laden software. Daarnaast kunnen we u helpen te voldoen aan wetgeving door, bijvoorbeeld, dataverzameling.

Gebruiksgemak

Als A-Z CPO nemen wij het hele proces rondom uw laadplein over, zodat u er alleen nog maar gebruik van hoeft te maken. Bij Equans doen we veel onderzoek en pilots omtrent onze customer journey, gebruiksgemak en communicatie met onze gebruikers, zodat we uw ervaring steeds beter kunnen maken.

Wilt u uw **energie uitstoot verminderen en uw mobiliteit verduurzamen**? Bij Equans verzorgen wij een laadplein zodat uw werknemers zorgeloos op kantoor kunnen laden. We maken een advies en ontwerp op maat. Daarna gaan we **binnen twee weken van ontwerp naar offerte**. Met ons exploitatiemodel nemen we het beheer van het laadplein en de benodigde investering op ons. Zo krijgt u een toekomstbestendige oplossing zonder extra kostenpost.



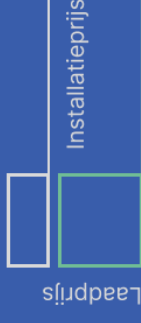
Advies



Installatie



Beheer



We zijn transparant over onze laadprijs. Afhankelijk van installatiekosten en energieaanbod zullen we voor u **de laagst mogelijke laadprijs** berekenen.

Kies net als onze klanten voor:

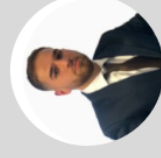
99% uptime

Gemak

Duurzame mobiliteit



Benieuwd naar de mogelijkheden?
Neem contact op voor een **vrijblijvend gesprek**



Bilel Harb

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Equans e-Mobility: Volledige ontzorging in duurzame laadpleinen

As-a-service laadinfrastructuur voor al uw locaties

Volledige ontzorging

Als marktleider in publieke AC laadpalen heeft Equans alle technische kennis in huis om uw laadplein te realiseren en onderhouden. Van installatie tot technisch onderhoud en software platform, wij nemen alles van je over. Daarbij nemen we ook de investering van u over, zodat u alleen maar bezig hoeft te zijn met laden.

Voldoe aan wetgeving en certificering

Duurzaamheid is één van onze kernwaarden bij Equans. De stroom in onze publieke laadpalen is 100% afkomstig van duurzame bronnen, we bieden refurbished laadpalen aan en kunnen uw energieverbruik verminderen met onze slim laden software. Daarmee kunnen we u helpen te voldoen aan wetgeving en certificeringen als BREEAM, LEAN en WELL.

Laden as-a-service

Als A-Z CPO nemen wij het hele proces rondom uw laadplein over, zodat u er alleen nog maar gebruik van hoeft te maken. Wij zorgen dat uw laadplein altijd up to date is met onze nieuwste software en we handelen storingen en klachten direct zelf af.

Wilt u uw **energie uitstoot verminderen en uw mobiliteit verduurzamen**? Bij Equans verzorgen wij een laadplein zodat uw huurders zorgeloos op kantoor kunnen laden. We maken een advies en ontwerp op maat. Daarna gaan we **binnen twee weken van ontwerp naar offerte**. Met ons exploitatiemodel nemen we het beheer van het laadplein en de benodigde investering op ons. Zo krijgt u een **toekomstbestendige oplossing zonder extra kostenpost**.



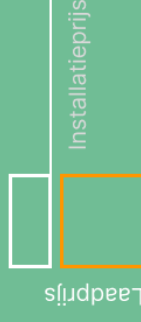
Advies



Installatie



Beheer



We zijn transparant over onze laadprijs. Afhankelijk van installatiekosten en energieaanbod zullen we voor u de ideale marge op de laadprijs berekenen. Afhankelijk van uw wensen vormt laadinfrastructuur zo mogelijk **een extra inkomstenbron dankzij ons exploitatiemodel**.

Kies net als onze klanten voor:

99% uptime

Geen eigen investering

Toekomstbestendig



Benieuwd naar de mogelijkheden?
Neem contact op voor een **vrijblijvend gesprek**



Martijn Stolk

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M +316 57 65 19 08



Appendix H – Interview guide customer validation

Interview guide customer validation

Dit zijn over het algemeen de belangrijkste redenen om laadinfrastructuur te willen installeren bij kantoorpanden.

- herkent u die?
- Mist u nog een reden?
- Zijn er dingen die niet van toepassing zijn?



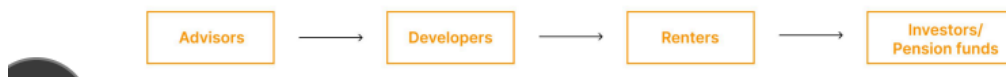
Grofweg zijn er twee paden voor de wens voor laadinfrastructuur goedgekeurd kan worden.

- Welk pad is het meest op u van toepassing?
- Hoe lang zou deze weg binnen uw bedrijf duren?

Bottom-up

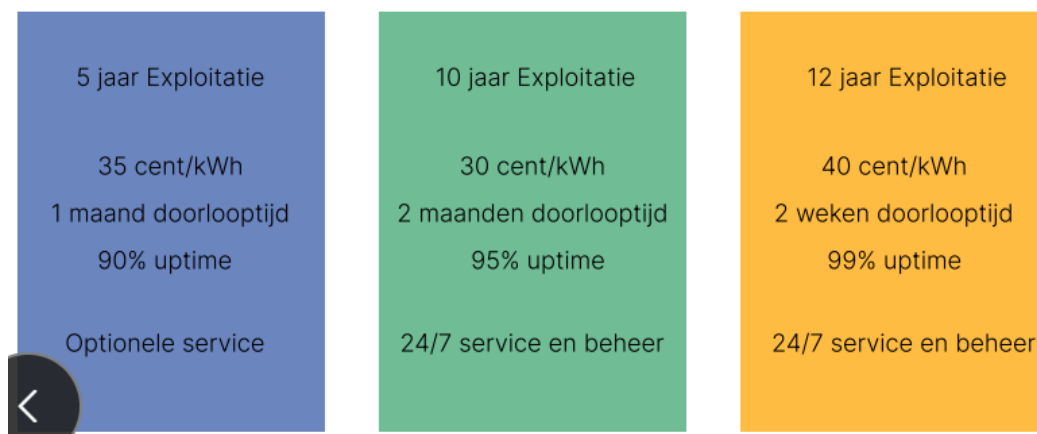


Top-down



Stel dat u kon kiezen tussen deze drie aanbiedingen:

- Welke spreekt u het meest aan
- Welk aspect is het belangrijkste?



- Welke slogan vindt u het meest bij Equans passen?
- Welke indruk hebben de mensen en werkwijze van Equans op u gemaakt?
 - Wat maakt Equans bijzonder?
 - Wat is de expertise van Equans?

Zorgeloos laden, altijd gaan!

Oprecht en Verbonden

Altijd op weg met een volle batterij

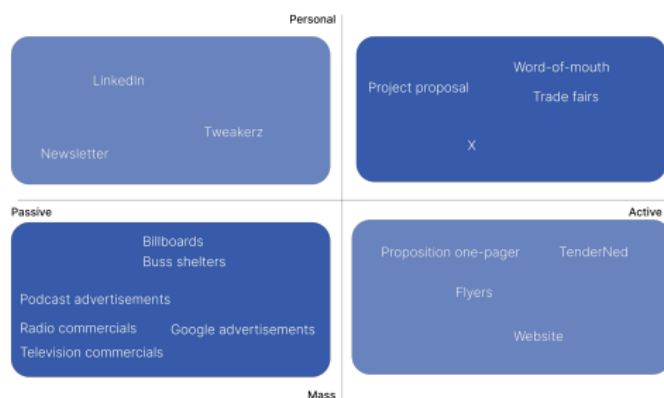
Een oplossing voor iedereen

Wij maken elektrisch rijden makkelijker

Snel en gemakkelijk laden, thuis of onderweg

Zorgeloos elektrisch rijden

Makkelijk en betaalbaar opladen



- Welke communicatiekanalen hebben uw voorkeur wanneer een nieuwe partij u benadert?
- Ik adviseer Equans gebruik te maken van meer standaard communicatie
 - one pagers met algemene informatie over de aanbieder
 - Massacommunicatie op billboards/posters
 - Algemene LinkedIn posts



- Welke van deze posters spreekt u het meest aan?
- Waarom?
 - Titel/ondertitel woorden
 - leesbaarheid
 - foto



Notes customer validation results

First, assumptions on market drivers were tested. Since the designs within the market entry strategy were based on specific market drivers these were validated before the final deliverables. In the competitive environment analysis, a list of market drivers found. These can be summarised in three main subjects:

- Sustainability
- Energy usage
- Legislation

In the validation interviews, customers were shown the overview of motivations in Figure 79. They were asked if they could relate to these motivations and if they missed any.

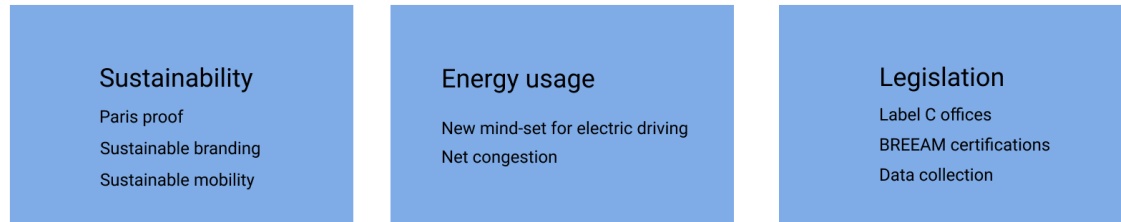


Figure 79: Motivations shown in customer validation interviews

As the main answers in Figure 80 show, value retention was missed in this overview, as 'future readiness', 'investment properties', and 'company continuity' are subjects that are part of value retention. The influence of legislation and certifications was emphasised.

Validation - Customer motivations

| Company | Market segment | Answers |
|---------------|---------------------|-------------------------------------------------------------------------------------------------------------------------------------------|
| Equity Estate | Decision influencer | "On one hand, you want sustainability for your children's future, on the other, sustainable buildings are valuable investment properties" |
| Danone | User | "You are tested on legislation" "Certifications help in obtaining funding" "Its about maintaining your companies continuity" |
| Mileway | Decision influencer | "The future is electric, you might want to add future readiness" |

Figure 80: Results validation – customer motivations

Next, the two main customer journeys were validated. Customers were shown the overview of Bottom-up and Top-down DMUs in Figure 81. They were asked if they recognised these DMUs and where they would place themselves.

Bottom-up



Top-down

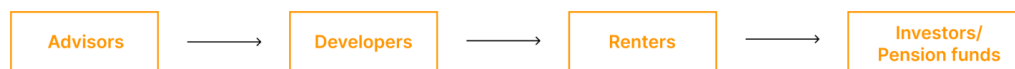


Figure 81: Bottom-up and Top-down DMUs

The main results in Figure 82 show Decision influencers put themselves in the Top-down DMU. Danone forms an exception, as they have experience with both DMUs. However, currently they view themselves in Bottom-up DMU.

Validation -DMUs

| Company | Market segment | Answers |
|---------------|---------------------|-----------------------------------------------------------------------------------------------------------------------------|
| Equity Estate | Decision influencer | "It depends on our specific portfolio" "Managers are involved in our DMU, renters are not" |
| Danone | User | "First I was Top-down, now I am Bottom-up" "Renters have to indicate when they want CPs, Top-down you get advice on CPs" |
| Mileway | Decision influencer | "I am Top-down" |

Figure 82: Results validation – DMUs

Next, customer's needs within Equans' proposition were looked into. As the market entry strategy does not involve changing the core proposition, it does contain assumptions on what parts of the proposition need to be emphasised in the proposal. Figure 83 shows three different fictional propositions. Customers were asked which is most attractive to them and why.

| | | |
|----------------------|------------------------|------------------------|
| 5 jaar Exploitatie | 10 jaar Exploitatie | 12 jaar Exploitatie |
| 35 cent/kWh | 30 cent/kWh | 40 cent/kWh |
| 1 maand doorlooptijd | 2 maanden doorlooptijd | 2 weken doorlooptijd |
| 90% uptime | 95% uptime | 99% uptime |
| Optionele service | 24/7 service en beheer | 24/7 service en beheer |

Figure 83: Fictional propositions

The results in Figure 84 show customers do not choose one of these propositions, but they do have specific preferences within them. Uptime is viewed as an average value, as long as the lower threshold is around 90 per cent this is viewed as sufficient. Charging price was not mentioned as a decisive factor, as long as it is reasonable to explain to renters. Exploitation term was a decisive factor, all customers preferred a shorter term with a possibility to lengthen it.

Validation - Propositions

| Company | Market segment | Answers |
|---------------|---------------------|------------------------------------------------------------------------------------------------------------------------------------------------------|
| Equity Estate | Decision influencer | "Explainability and DMU are the most important aspects" "A margin needs to be explainable to renters" "There needs to be a threshold for uptime" |
| Danone | User | "As a renter I have a contract, I want all contracts to end simultaneously" "A term of 5 years that can be extended would be ideal" |
| Mileway | Decision influencer | "You definitely want optional service" "I would rather want a short exploitation term" "Uptime is not always the same, 90% average would be fine" |

Figure 84: Results validation – propositions

After aspects within the proposition, the step was made to the proposal surrounding it. First, the general impression of Equans on customers was validated. Figure 85 shows four mission statements. These belong to Equans e-mobility, Eneco, Shell Recharge and Vattenfall. Customers were asked which statement spoke most to them. All customers chose Equans' slogan, "Carefree charging, always on the go". However, "Easy and affordable charging," Vattenfall's slogan, was mentioned as being attractive.

| | |
|------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------|
| Zorgeloos laden, altijd gaan! Oprecht en Verbonden | Altijd op weg met een volle batterij Een oplossing voor iedereen |
| Wij maken elektrisch rijden makkelijker Snel en gemakkelijk laden, thuis of onderweg | Zorgeloos elektrisch rijden Makkelijk en betaalbaar opladen |

Figure 85: Mission statements

Without telling them which statement belongs to Equans, the general impression Equans has left on them was asked. Figure 86 shows that Equans was experienced as friendly, professional and honest.

Validation - Impression of Equans

| Company | Market segment | Answers |
|---------------|---------------------|-------------------------------------------------------------------------------------------------------------------------------------------|
| Equity Estate | Decision influencer | "Equans was very pleasant to work with" "People are the main assets" |
| Danone | User | "I do have some questions on expanding our infrastructure" "Not everything went right, but they are way more professional than EV Box" |
| Mileway | Decision influencer | "I have a positive impression" "They were honest and eager to find a suitable solution" |

Figure 86: Results validation – impression of Equans

Appendix I – Customer validation results

Danone

| Company | Market segment | Market drivers | Bottom-up top-down |
|---------|----------------|--------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------|
| Danone | User | op wetgeving wordt je getoetst | Allebei, want toen we het pand neer gingen zetten, dan was het zeg maar top down. |
| | | Wetgeving van buitenaf en de overkoepelende corporate zijn drivers | En toen gingen we het nog maar uitbreiden. Ja, Dat was weer bottom up. |
| | | Het gaat ook over bedrijfscontinuïteit waarborgen | Als huurder moesten we aangeven dat we meer laadpalen nodig hadden |
| | | Certificeringen onderscheiden je pand in de verkoop | Top-down laat je je adviseren hoeveel laadpalen je nodig hebt |
| | | Certificeringen helpen mee in het verstrekken van financieringen | Want het hangt ervan af uiteindelijk hoeveel in het stroom hoeveel capaciteit in In de In de openbare stroomnetwerk er beschikbaar is. |

| Ideal proposition | Slogan |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------|
| Nou ik bekijk het als huurder, hè, dus Ik weet, Ik heb een huurcontract lopen. | Ja zorgeloos laden altijd gaan. |
| als huurder wil je flexibiliteit hebben dat je overal weer van gevrijwaard bent. | Ja, Ik denk dat makkelijk en betaalbaar laden. |
| Wat ik eigenlijk met alle contracten? | Hoe minder ingewikkelde hobbels, hoe makkelijker, ja. |
| Probeer te doen dus ook met servicecontracten met je beveiligings contracten. Noem het allemaal maar op. | |
| Is dat je het zoveel mogelijk zoveel als mogelijk gelijk laat lopen met termijn van je huurcontract. Wat ik eigenlijk met alle contracten? Probeer te doen dus ook met servicecontracten met je beveiligings contracten. Noem het allemaal maar op. | |
| Is dat je het zoveel mogelijk zoveel als mogelijk gelijk laat lopen met termijn van je huurcontract. Ik kan met een langere doorlooptijd leven | |
| Het liefst eenmaal ideaal is is. | |
| Denk ik dan 10 jaar, 30 cent, een maand. Liefst 99% up time, 24 keer 2 en een break class. Wat is gebruikelijk in de huur termijnen in de vastgoedwereld? En dan kan je dus zeggen, 10 jaar exploitatie plus plus 5 plus 5 bijvoorbeeld. | |

| Impression of Equans | Communication channel |
|----------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Ja, nou moet ik even aangeven dat de wij hadden eerst EV box. | Ik denk dat al dat het belangrijk is, ook netwerken, dat wil zeggen dat. |
| Ik moet zeggen dat Als ik het vergelijk met de problemen die We hadden met EV box, dan is het vind ik equense professioneler professionaliteit. | Het moment van instappen in zo een bouwproject of nog daarvoor het moment van plannen maken. Dat begint, zeg maar een jaar net begint, zeg maar twee jaar voordat hij paal erin gaat. |
| Ja alhoewel ik ook nog op een aantal vragen heb, hoor over de uitbreiding | Je moet weten. Waar zijn de? |
| Er zijn een paar dingen die zijn niet goed gegaan, Maar ik heb wel de indruk dat ze professioneler zijn dan wat we met EV boxen hebben meegemaakt. | Ja waar zijn welke bestemmingsplannen? |
| Ze hadden ook gewoon een gevoel wat je erbij hebt. En toen is niet, dat mag heel persoonlijk. | En daarmee netwerken, dan ben je er volgens mij bij de basis bij voor. Gebouweigenaren of voor huurders of voor. |
| | Heel vroeg in het traject hoe eerder in het traject, hoe meer kans je maakt. Hoe werkt het vanuit een klant is? Wij wilden ons huurcontract liep af, nou, dan ben je ongeveer 2 3 jaar van tevoren ga je bedenken. Maar dan denk je niet meteen. Oh, ik moet een laadpaal leverancier hebben. Laat ik even In de laadpalen leverancier markt kijken. Daar krijg je advies van, want voor dit soort bouwplannen heb je adviseurs, Ja nou dan zijn er ook wel netwerk platformen, dus je hebt facility management platform en je hebt een platform in corporate really State. Meer targeted doelgroepen? Misschien ja. |
| Preferred poster | preferred one-pager |
| Oh ja, en ze zijn allebei wel goed. | Nou, Ik denk dat dat prima is. Ik denk dat. Ja Misschien dat dit blauwer Misschien nog wel iets iets weet het niet zo goed. Ja, Ik denk dat maar dan gaat het over die dan heb ik Alleen maar al die Quincy e Mobility en dan staat volledige ontzorging in duurzame laadpleinen. Ik zou volledige ontzorging. Dat klinkt wel heel aantrekkelijk en dan zou ik die blauwe nemen. Ja dus de groene tekst volledige ontzorging, maar dan de blauwe. De rest is verder blauw, toch? En de eerste vraag die je dan als gebruiker hebt is, hoe weet ik nou of ik genoeg capaciteit heb in het netwerk? |

Equity Estate

| Company | Market segment | Market drivers | Bottom-up top-down |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Equity Estate | Decision influencer | Het is een beetje hoe je het bekijkt enerzijds Als je aan mij vraagt Waarom verduurzamen | Het ligt er ook een beetje aan Als we heel specifiek naar ons portfolio kijken. Wij hebben ook wel een bepaalde taak richting ons achterliggende investeren is om de zin en onzin van het verduurzamen uit te leggen. |
| | | | En Wij zijn echt, zeg maar hun operationele ogen en oren in het veld |
| | | | a, Het is een beetje van allebei, denk ik. |
| | | | Ja wat wij zien is dat heel veel toeleveranciers, zeg maar voor nou, de property manager is of de installateur die die die zijn hier wel mee bezig, maar nog niet helemaal hetzelfde geldt voor huurders. |
| | | | maar ook kleinere huurders gaan hiermee te maken krijgen, maar die beseffen dat Misschien nog niet helemaal. |
| | | | En wij proberen ze daar ook wel in die zin mee te helpen voor door de gebouwen voor te bereiden op op de vragen die die ze die ze beantwoordt die ze hem eigenlijk moeten beantwoorden. |
| | | | |
| | | | |
| Ideaal proposition | | | Slogan |
| Nou, kijk wat wij heel erg belangrijk vonden In de hele exercitie is waar wij eigenlijk twee dingen een is, is de uitlegbaarheid van je besluitvorming | | | Ik sta naar die zorgeloos elektrisch rijden gaan. |
| een marge dat moet uitlegbaar zijn, want uiteindelijk zijn de huurders die middelste later transacties betalen | | | Ja, want ik vind die eerste. Ja, zorgeloos laden altijd gaan. Ja, dat klinkt een beetje als, nou ja. |
| Ja tenderproces moet je een goed verhaal hebben. Anderzijds hebben wij ook een verantwoordelijkheid richting de huurders soms zo scherp mogelijk, zeg maar financieel dat aan te vliegen. | | | Donald Duck kreet, |
| aar de de de marge per kilowattuur was voor ons heel erg belangrijk, | | | altijd op weg met een volle batterij. Ja, dat vind ik echt een hele slechte uitspraak, want Waarom zou je altijd met een volle batterij moeten laden, weet je wel, die actieradius? Ze zijn dermate groot. Je hoeft niet altijd met een volle batterij. |
| Natuurlijk zijn dingen als uptime heel belangrijk, Maar ik denk Als ik hier 20 laadpalen heb en 5% 95% doet het. Ja, dan mogen er best wel maar een of twee één keer niet aan staan. Weet je daar daar daar? Daar kraait geen haan naar. | | | |
| En dat gezegd hebbende moet je wel een bepaalde ondergrens hebben. Ik heb er Natuurlijk niks aan Als ik laat bepaalde passend onpas in storing staan, want dan heb je alsnog gebruikers op vuur, dus die daar over gaan klagen. | | | |
| | | | Dus zorgeloos vind ik dan het beste Omdat je. |
| | | | Ja je wil er niet teveel over na over denken, dus als ze de laad infrastructuur gewoon goed geregeld is overal waar je komt, dan is dat geen item meer. |

| Impression of Equans | Communication channel |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Ik vond de heren van Van Equans wel bijzonder prettig om mee samen te werken. We hadden ze het ook graag runt Alleen ja, concurreren. | ijk wat wij de laatste maanden ook veel doen en Dat is ook wel een krachtig medium is ook de successen, zeg maar uit op op LinkedIn en wij zien dat daar wel heel veel engagement op zit, dus ik kan me zo goed voorstellen dat als equans een bepaald laadpalen project succesvol heeft uitgerold en met degene opdrachtgever daar bepaalde uitingen op LinkedIn over deelt dat dat wel gezien wordt. |
| Het kwam op op een beter tarief voorbij, dus Als de man een doorsnede zijn van het personeel bij u kunt zijn er denk ik over het algemeen wel prettige mensen. | paar projecten goed doet bijvoorbeeld met een beheerder of wat dan ook? Ja, dat dat ook wel zorgt voor meer business. |
| Alleen, ja ja, wat ik zeg, het zit echt in de mensen | Kijk waar ik minder in geloof is dat ze echt op op de Provada ofzo moeten gaan staan. |
| Ja, de mensen zijn de assets, toch wordt vaak gezegd. | Ja dus qua zichtbaarheid, hoe heet dat? Ja, kan je dat doen, maar volgens mij kun je beter gewoon meer geld verstoppen in je LinkedIn campagne. |

| Preferred poster | preferred one-pager |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------|
| De rechter. | Ja, ik denk dat dat je dat ik zou aanslaan op volledige ontzorging. |
| Nee Zonder investering. | Ja, weet je, kijk A tot z expertise. Ja, ik geloof ik wel dat dat e gunst op een andere partij dat hij het wil. |
| Kijk, uiteindelijk is het een soort ja dienstverlening richting de huurders die die wil opstarten en veel commerciële beleggers zitten in de exploitatie van vierkante meters en niet in de exploitatie van laadpalen. | Alleen Als je ergens niet volledig ontzorging, dan denk je van, oh ja, Dat is wel makkelijk. |
| En en zo een investering in 10 2025 laadpalen Het is best wel substantieel. | |
| Als je dat op een slimme manier kan wegleggen bij een partij die daar gespecialiseerd in is, die ook beter gepositioneerd is om niet om die monitoring en onderhoud et cetera et cetera te doen en Je kunt dat Zonder K apex zeg maar investeer. Ik weet eigenaar wegzetten. Ik denk dat heel veel partijen daar geïnteresseerd in zijn. | |

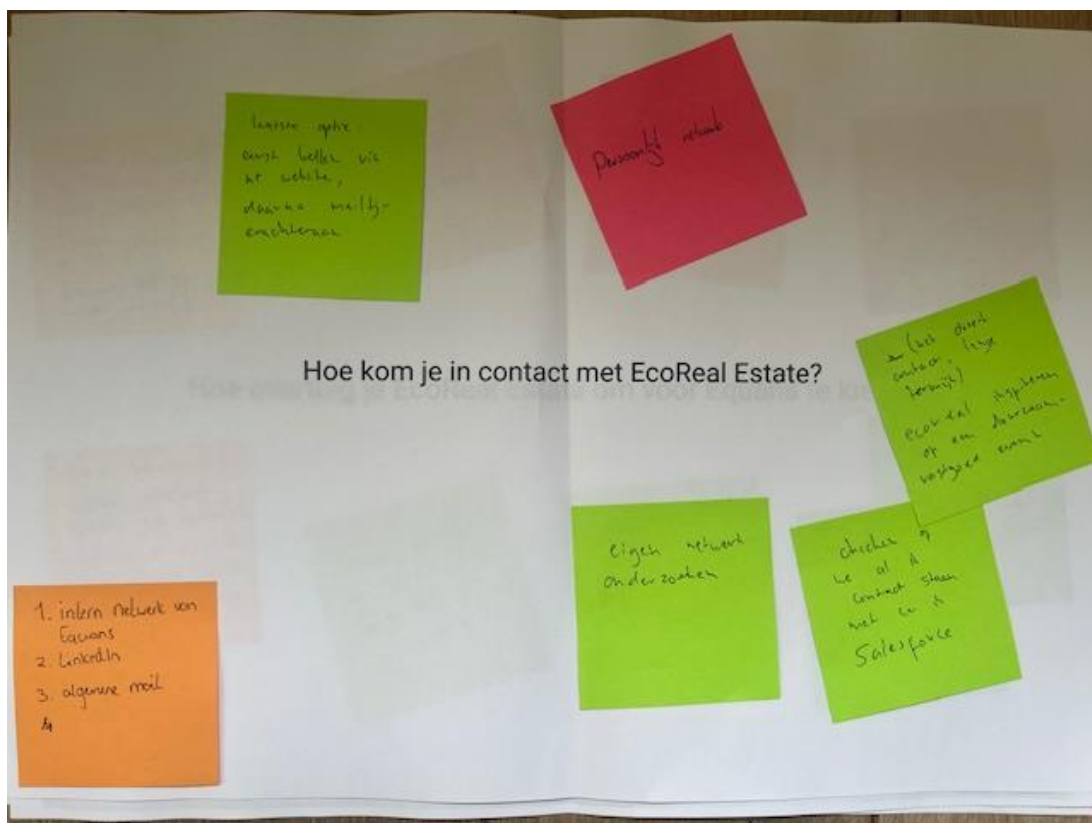
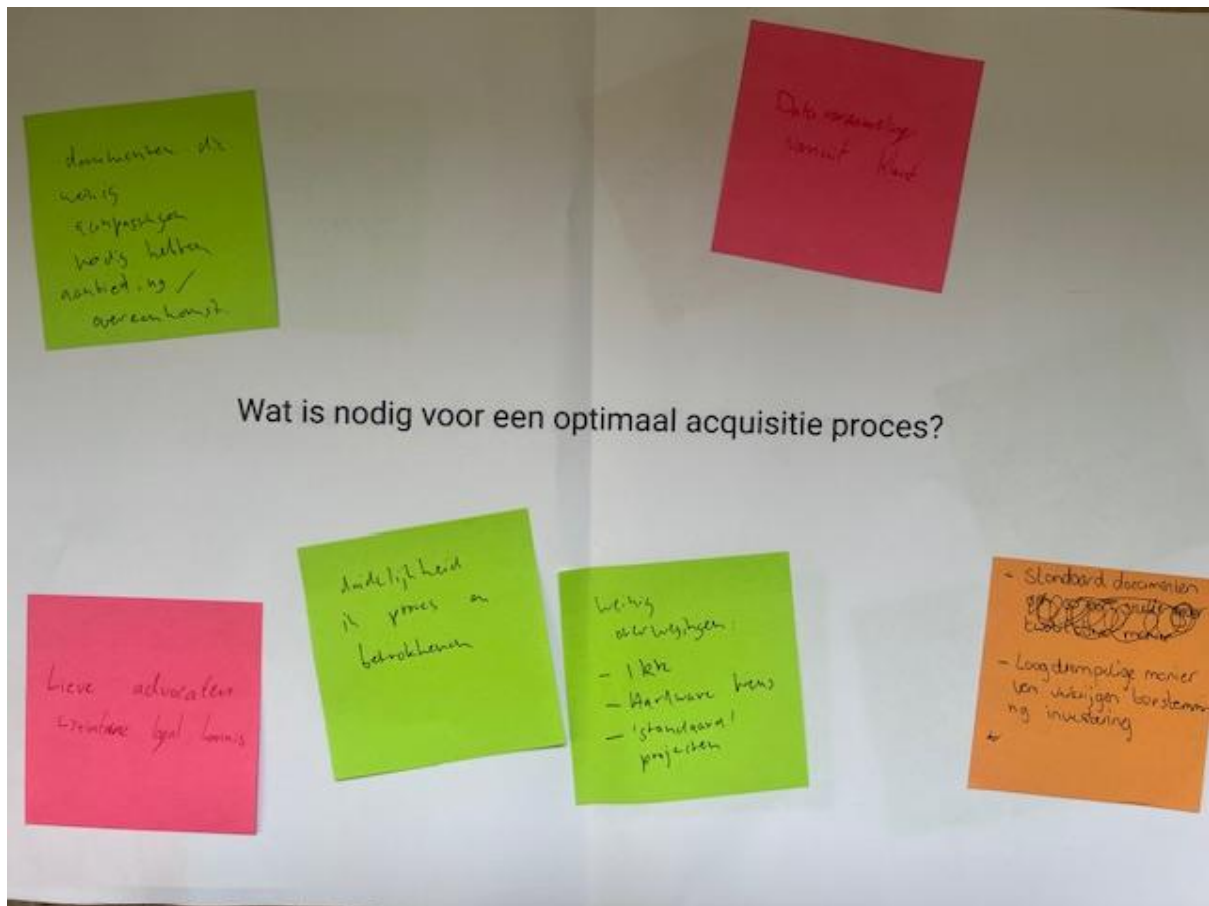
Mileway

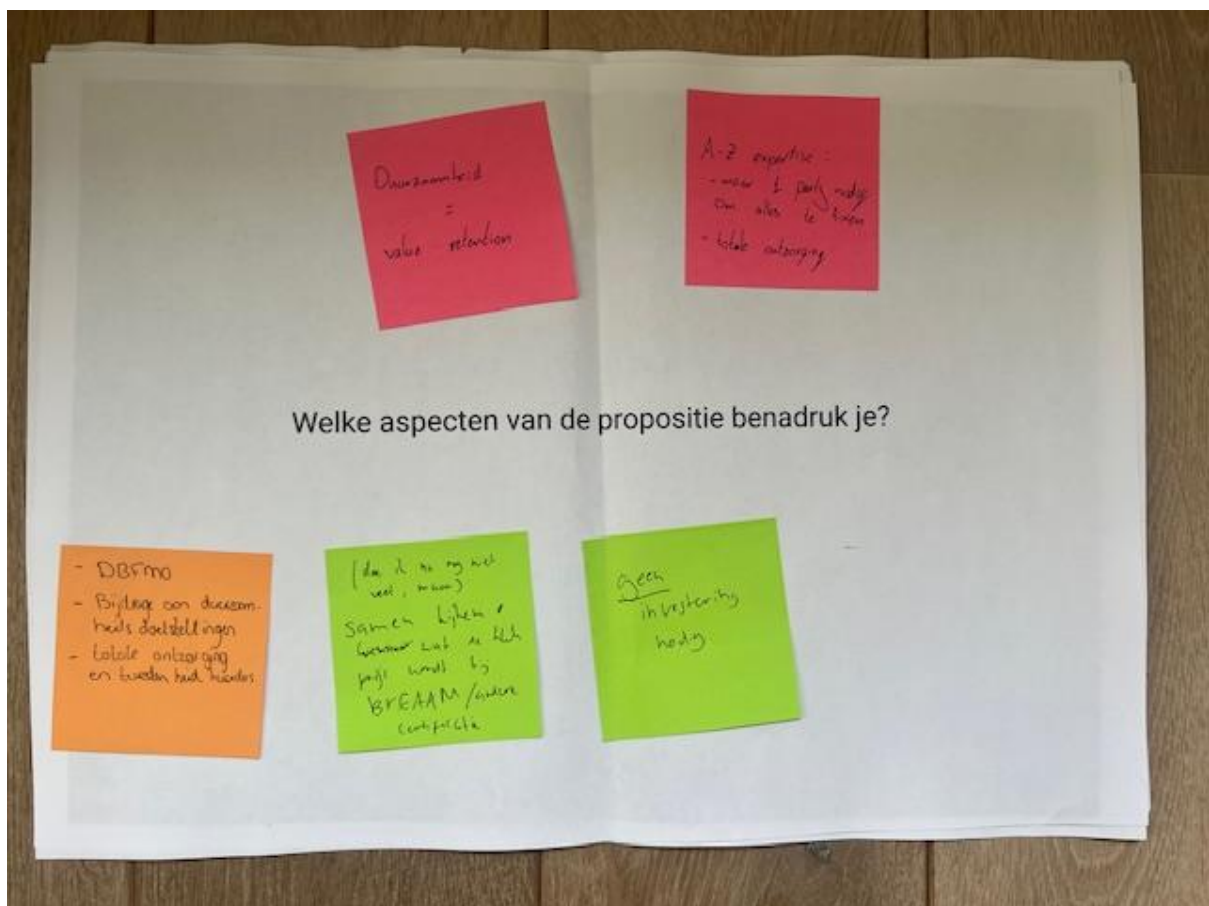
| Company | Market segment | Market drivers |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Mileway | Decision influencer | Ik zit ook nu te denken, Misschien future readiness of zo iets. Ja, want in principe is de toekomst Natuurlijk allemaal elektrisch. Dus dat dat hier Misschien nog interessant is om te noemen. |
| Bottom-up top-down | | Ideal proposition |
| Ik ben top down. Ben ik ja, ja. | | Wat betekent die 35 cent per kilowatt? Betaal je dat of krijg je dat of moet de huurder dat betalen de gebruiker eigenlijk? |
| Dus ja, in principe Wij zijn de eigenaren. | | Oké en ik vind, want ik vind het opvallend dat bij 12 jaar exploitatie dan 40 cent is, maar heeft dat dan met die uptime te maken? |
| En vanuit de overheid is dus dat we nu een laadpaal moeten hebben per. | | Oké en wat is uptime eigenlijk? |
| 20 parkeerplekken. | | Een goede vraag ja, op zich exploitatie 5 jaar exploitatie, Dat is wel interessant. |
| En vanuit daar zijn we nu een strategie aan het uitrollen. | | Optionele servers zou op zich die service weer die sowieso wel bij hebben. Dus ik weet niet of dat dan uiteindelijk uit gaat maken in het kilowattuur of dat dat dan los erbij komt. Dat gok ik dan. |
| En daar nemen we ook in mee dat als er bepaalde huurders zijn die niet per se meedoen of niet perse 20 parkeerplekken hebben, maar wel interesse hebben dat we ook kijken of we die kunnen meenemen, dus Dat is wel ook een beetje bottom up uiteindelijk Natuurlijk. | | Ik neig wel eerder naar naar die 5 of die 10 jaar. a, up time. Ja, Dat is toch iets wat een beetje fluctueert is, denk ik überhaupt. Dus dat kan ook beter zijn, denk ik die dan 90%. |
| Slogan | | Impression of Equans |
| Ik denk die Linksboven zorgeloos Laden altijd gaan. | | Nou, op zich is het wel gewoon positief. |
| Je kunt een pakkend, denk ik iets wat je het snelst leest. | | En ook wel eerlijk, want ze gaven dus aan van oké, op dit moment kunnen we niet bieden wat wij. |
| En het snelste onthoudt ook ja. | | Wat wij toen zochten, dus ja, Dat is eigenlijk, denk ik heel goed. Wel Eager om om een passende oplossing te. Vinden. Ja en proactief, want ze kwamen ook wel naar mij toe met vragen en tussendoor nog weer dus ja |

| Communication channel |
|-----------------------------------------------------------------------------------------------------------------------------------------------|
| Ja wel denken LinkedIn sowieso belangrijk. |
| En billboard ja in principe zijn onze asset managers heel veel onderweg, dus daar kunnen ze wel bereik ligt wel een beetje aan waard is maar. |
| Gok dat Als je ergens bij, hoe zeg je dat pompstations gaat staan? |
| Daar zijn ook vaak laadpunten volgens mij dat. |
| Dat klinkt wel logisch allemaal, ja? |
| Ja en Ik denk dat elektrische auto's wel wat bij wat oudere Mensen liggen die het zelf hebben in ieder geval. |
| Die zelf aanschaffen maar. |

| Preferred poster | preferred one-pager |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------|
| Ik zie ze en duurzaam laadplein. | . Ja, Het gaat voornamelijk over de kleurkeuze dan. |
| Goeie. | Ik denk rechts |
| Nou, dat vind ik lastig deze? | Omdat die is wat vrolijker aar. |
| Bij die linker, dan is hij wel achter aan het laden. Zo zie je gelijk dat het echt over | Ik denk dat links juist wel weer wat rustiger leest, want de contrast wat lekkerder is. |
| Wij rechts lijkt het dan meer op een professional. | Ja, Ik denk toch eigenlijk dat ik links eerder ga lezen, merk ik nu dat mijn ogen daar eerder naartoe gaan qua. Leesbaarheid |
| Nou, Ik denk Misschien toch wel dit nou. Het is meer dat rechtstreeks meer je aandacht Omdat dat Oranje is, dus dan kijk je eerder naar. Maar Misschien kan je die jas van links ook wel Oranje maken en dan kijk je daar in. Want Ik denk dat links ja, dan zegt gelijk. Oh, Dat is aan het laden of zo, dus dan. | de andere is het contrast net iets minder lekker lezend, denk ik. |

Appendix J – Internal validation workshop results





uiteindelijk betalen de asers
↳ hebben best een grote invloed

Eigenaren zijn soms ook beleeders
van pand

Ideale way of working is bij een
partij binnenkomen die dan introduceert

Reac

- direct begrijpelijk
- Benadering verschillende groepen
 - wat voor verhaal moet ik
 - een partij gaan overleggen?
 - want dat zijn partijen super
 - technisch verhaal dat Nivab
 - Wel bijv. ~~partij~~
 - ↳ focus ten koste van
 - hogere tarieven naar huurders

→ Intro van 5 parameters mist
op visual

- zijn al stappen aan het maken
↳ hebben nu een presentatie

B. eigenlijk Nivab of KPAG wil je
de huurder aanspreken
↳ alle groepen zitten bij de
meeting
→ KPAG geeft huurders veel macht

• Hoe vaak hebben wij contact
met huurders?

Markbet entry strategy
↳ alleen eerste contact is deel
van proposal

Hoe overtuig je de huurder

- is exploitatie duur een grote factor
↳ parameter? conclusie?

Valideer of betaal points lopen
met nieuwe input
↳ kom je zonder framework
op dezelfde proposal

Appendix K – SWOT analysis

To summarise possible strategic directions based on the results of the discover phase, a SWOT analysis is conducted, as seen in Figure 87 (Cascade.nl, 2024; Cooper, 2015).

| | |
|----------------------------------------------------|--------------------------------------------|
| Versatile customer portfolio | Lack of brand identity |
| High quality service | Lack of marketing opportunities |
| In-house knowledge | Unclear market entry strategy |
| Personal proposition development | |
| Strengths | Weaknesses |
| Opportunities | Threats |
| Diversify portfolio into specified market segments | Uncertainty of competitor's strategy |
| Use market leader status to enter new markets | Choice of diversification vs. market focus |
| | Highly competitive market |

Figure 87: SWOT analysis for Equans' B2B within corporate AC charging

As this SWOT analysis shows, marketing outings and a lack of a clear market entry strategy form weaknesses for Equans B2B. Especially when looking at the threat of a highly competitive market it is important to have strategic direction that helps Equans stand out from competition through marketing outings and brand identity. Marketing and communication outings will, therefore, be part of the framework created through this project. On the other hand, the diversification, and therefore risk distribution, of the B2B team's portfolio offers fruitful opportunity to gain market share. This is emphasised in the framework and market entry strategy.

Appendix L – Project brief

Project title

Expanding e-mobility infrastructure into the Dutch real estate market: a strategic approach to define a proposition

Please state the title of your graduation project (above). Keep the title compact and simple. Do not use abbreviations. The remainder of this document allows you to define and clarify your graduation project.

Introduction

Describe the context of your project here; What is the domain in which your project takes place? Who are the main stakeholders and what interests are at stake? Describe the opportunities (and limitations) in this domain to better serve the stakeholder interests. (max 250 words)

The energy transition is a hot topic across all sectors in The Netherlands. As the urgency of sustainable development can not be denied opportunities arise for strategic implementation of technologies that support the energy transition. Transport makes up for 25 percent of Dutch emissions (Rijksoverheid, 2022). Improving charging infrastructure and therefore facilitating more sustainable transport forms a very tangible development within the energy transition. Currently, 30 percent of newly sold cars are fully electric, making up 5 percent of all cars in the Netherlands. This number is rapidly growing, supported by legislation and EU-wide targets (ElaadNL, 2024; Schlögl, 2017). Equans e-mobility is the current market leader in public charging infrastructure. Their expertises include charging point installation, software development, energy procurement, finance, asset management, data analysis, design and engineering. Internally it forms a challenge to combine all these expertises into an effective proposition for both public and private clients. The current proposition is built on the DBFMO-principle, meaning Design, Build, Finance, Maintain, Operate.

Within e-mobility, two types of business models can be roughly identified: Business to Government (B2G) and Business to Business (B2B). Where B2G is based on tenders, initiated by municipalities and government, which are bound to legislation and large-scale operational challenges, B2B cases are often smaller-scale and more bound to specific demands based on the client. These different markets require in-depth knowledge of legislation, software, hardware, customer support, finance and marketing strategy. Equans wants to increase the share of B2B sales in their business model, creating opportunity of standardization and redesign of their proposition based on desired customers.

A newly growing possible market for B2B charging infrastructure is the commercial real estate sector. Legislation and challenges regarding sustainable energy are both very prone in this sector. Economical and socio-political issues call for more housing, office space and in general: real estate. Therefore, grid connections face an increasing demand. However, grid congestion and legislation regarding e-mobility make it hard to integrate financially beneficial, sustainable infrastructure (Rijksdienst voor Ondernemend Nederland, 2024). By offering charging infrastructure and software to smartly manage its (energy) usage, Equans offers a future-proof way of adhering to legislation and managing grid load.

→ space available for images / figures on next page

Problem Definition

What problem do you want to solve in the context described in the introduction, and within the available time frame of 100 working days? (= Master Graduation Project of 30 EC). What opportunities do you see to create added value for the described stakeholders? Substantiate your choice. (max 200 words)

Commercial real estate offers a fruitful new market segment, as they touch upon legislation regarding infrastructure, grid connection and congestion and both large- and small-scale infrastructure development. However, this market is not yet defined properly for Equans e-mobility to target it effectively with their B2B business unit. This makes it impossible to strategically enter the optimal market segments within commercial real estate and alter a proposition for their needs.

Within this project, the aim is to create an overview of market segments within commercial real estate and to identify challenges, demands and opportunities across those segments. Additionally, an internal overview of possible propositions and expertises connected to developing those to match different market segment's needs will result in a clear business to business marketing strategy. Combining these internal and external overviews in a market entry strategy offer a designing opportunity for a framework to alter a proposition based on strategic leverage points in the commercial real estate market.

Assignment

This is the most important part of the project brief because it will give a clear direction of what you are heading for. Formulate an assignment to yourself regarding what you expect to deliver as result at the end of your project. (1 sentence) As you graduate as an industrial design engineer, your assignment will start with a verb (Design/Investigate/Validate/Create), and you may use the green text format:

Design a proposition framework to strategically enter a newly defined market for Equans E-mobility in the context of business to business sales in real estate

Then explain your project approach to carrying out your graduation project and what research and design methods you plan to use to generate your design solution (max 150 words)

To execute this assignment I will split up my project in two parts based on the double diamond model. The first part broadly consists of discovering and defining, or designing the 'right things', the second of developing and delivering, or designing 'things right'.

In the first weeks I will diverge my knowledge through literature research, internal interviews within Equans and external interviews with future possible real estate clients. The knowledge gained from this will be used to create an overview of stakeholders, newly defined market segments, possible future developments and specific desires and opportunities that belong to these segments within commercial real estate.

When this overview is created, leverage points within it can be identified. Therefore the second part of my project will consist of developing a strategic approach to enter specific market segments. This will be embodied in a framework that allows for Equans B2B proposition to be specifically tailored towards the identified market segments.

Motivation and personal ambitions

Explain why you wish to start this project, what competencies you want to prove or develop (e.g. competencies acquired in your MSc programme, electives, extra-curricular activities or other).

Optionally, describe whether you have some personal learning ambitions which you explicitly want to address in this project, on top of the learning objectives of the Graduation Project itself. You might think of e.g. acquiring in depth knowledge on a specific subject, broadening your competencies or experimenting with a specific tool or methodology. Personal learning ambitions are limited to a maximum number of five.

(200 words max)

This project offers several opportunities to develop as a strategic designer in a future-proof, technical context. Strategic Product Design has taught me stakeholder management, long-term strategy development and how to tackle complex problems throughout different organisational levels. By developing a market entry strategy for Equans E-mobility I get the chance to combine these skills into a strategy supported by a workable prototype. This allows me to combine these interests into a strategic project that requires stakeholder management, broadening knowledge and financial, technical and strategic justification of my design choices. It requires me to convert a broad task into a workable result that fits in the existing strategies within the company.

My personal interests regarding professional development lie within introducing design methods in a non-design focused company, developing strategies to work towards more sustainable technology development and translate complex problems into workable plans that motivate people intrinsically. As an overarching context, I like to work in a technical environment, as this requires me to translate my design knowledge and tools into clearly feasible, viable and desirable results. Working at Equans E-mobility, I can explore the energy transition and translate my work into a tangible contribution.

Appendix M – Expected internal growth within scope
(confidential)

Appendix N – Internal document excerpts (confidential)

Appendix O – External expert interviews (confidential)

Appendix P – Internal expert interviews (confidential)

Appendix Q – Customer interviews (confidential)

Appendix R – Validation interviews (confidential)

Appendix S – Codes customer interviews (confidential)