

IWCI COMMISSIONED STUDIES · MARKET · FUTURE · IMPACT

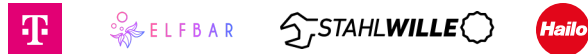
Evidence beats opinion.

Studies that carry decisions. And hold up in debates.

Market studies, foresight studies and impact studies from an independent institute. Academically assured, judged with an operator's eye. As a confidential basis for decisions or as a publishable reference study.



CLIENTS OF THE INSTITUTE AND ITS FOUNDER, AMONG OTHERS



FOUNDER FEATURED IN

Handelsblatt brand eins impulse marconomy



Edition October 2026 · www.iwci.de

Every study starts with a question. And ends with an answer that holds.

IWCI conducts studies on behalf of companies, associations and investors. The study is not shaped by the subject area but by the question a decision or a debate depends on. That defines the study type, the method and how the results will be used.

THREE QUESTIONS, THREE STUDY TYPES

What is?

Market study

Market, potential, target groups and competition.
Calculated and evidenced.

What is coming?

Foresight study

Scenarios for markets, technologies and regulation up
to 2035.

What does it do?

Impact study

Effects on health, economy and society. Quantified in
euros.

PRINCIPLE

Question, method, use

USE

Basis for decisions or reference
study

DURATION

A few weeks to 6 months

QUALITY

University partners, open
methodology

Four chapters. From the question to the reference.

01	Why commissioned studies Situation, positioning, guiding principle	from page 04
02	Three study types Market study, foresight study, impact study	from page 07
03	Method, quality and process Toolkit, use, principles, formats	from page 11
04	References and institute Track record, cases, topics, team	from page 17



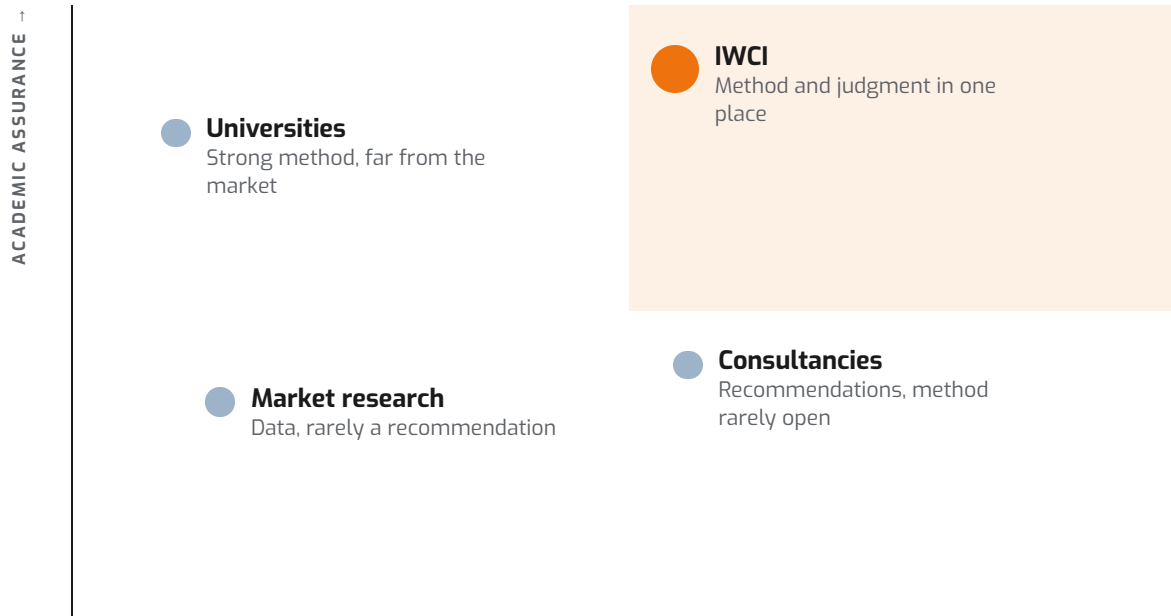
There is plenty of data. Robust answers are rare.

Internal analyses mostly confirm what is believed internally. **A commissioned study tests it from the outside.**

That is where expensive wrong decisions happen: markets smaller than expected. Trends that turn out differently. Arguments nobody outside believes.

- **Industry reports describe yesterday's market**
They tell you how big a market was. Not what you can win in it.
- **Market research delivers data, not an answer**
A hundred pages of tables do not replace a recommendation. The interpretation stays with you.
- **The future gets extrapolated, not played through**
Linear forecasts miss disruptions from technology, regulation and behaviour.
- **Your own numbers convince nobody outside**
What a company calculates about itself is seen as biased by policymakers, insurers and the media.

Between university and consultancy. With the best of both.



OPERATOR'S JUDGMENT AND CLOSENESS TO IMPLEMENTATION →
 Schematic positioning of provider types, not an assessment of individual companies.

Like a university

Open methodology, university partners, academic quality assurance.

Like an operator

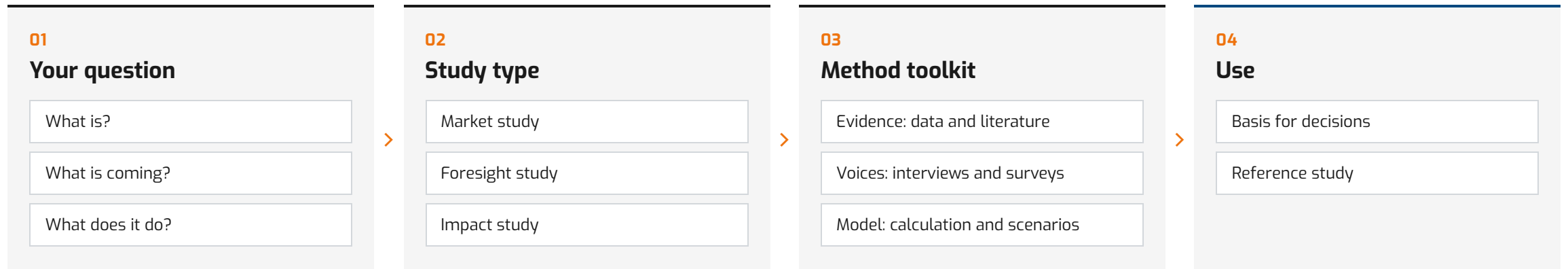
Every study ends with a recommendation that carries a decision.

Independent

No interest in a particular outcome. The data decides, not the client.

Universities deliver method, consultancies deliver recommendations. **IWCI delivers both in one study.**

One principle for every study. Question, method, use.



The question defines the study type. The study type defines which building blocks from the toolkit are combined. The intended use defines the depth of documentation and the type of quality assurance. Every study is tailored and still built to fixed rules.

It is not the subject that makes a study robust. **It is the method behind it.**

Three questions. Three study types.

01

Market study

What is the market, and what is in it for you?

APPLICATIONS

Market entry New business area Price and channel
Target groups

TYPICAL RESULT

Market model with volume, segments and your attainable share

02

Foresight study

What is coming, and what do you do when it comes?

APPLICATIONS

Strategy 2035 Technology and AI Regulation
Future of an industry

TYPICAL RESULT

Three to four scenarios with early indicators and a roadmap

03

Impact study

What does it do, and what is it worth?

APPLICATIONS

Health economics Macroeconomic effects
Regulatory impact Economic footprint

TYPICAL RESULT

Effects and costs in scenarios, quantified in euros, QALY and DALY

Each study type with its own set of methods. **All following the same principles.**

What is the market?

And what is in it for you?

Typical questions

- How large is the addressable market, and how is it growing?
- Which segments and target groups are worth it, which are not?
- Why do customers buy, and why do non customers buy elsewhere?
- Where do you stand against competitors on price, performance and channel?

Methods

Market model top down and bottom up

Interviews with customers and non customers

Competitor analysis

Survey

Applications

Market entry

New business area

Price and channel

Positioning

Market model · Project Horizon

ILLUSTRATIVE

Total market DACH €2.4bn

Addressable market €820m

Attainable by 2030 €95m

Annual growth by segment

Segment A +4 %

Segment B +11 %

Segment C +13 %

Top down from secondary data, bottom up from customers, volumes and prices. Both calculations checked against each other.

What is coming?

And what do you do when it comes?

Typical questions

- Which drivers shape your market up to 2035, which are noise?
- How do technology and AI shift value creation?
- Which regulation is coming, and what does it do to demand?
- How do you see early which scenario is unfolding?

Methods

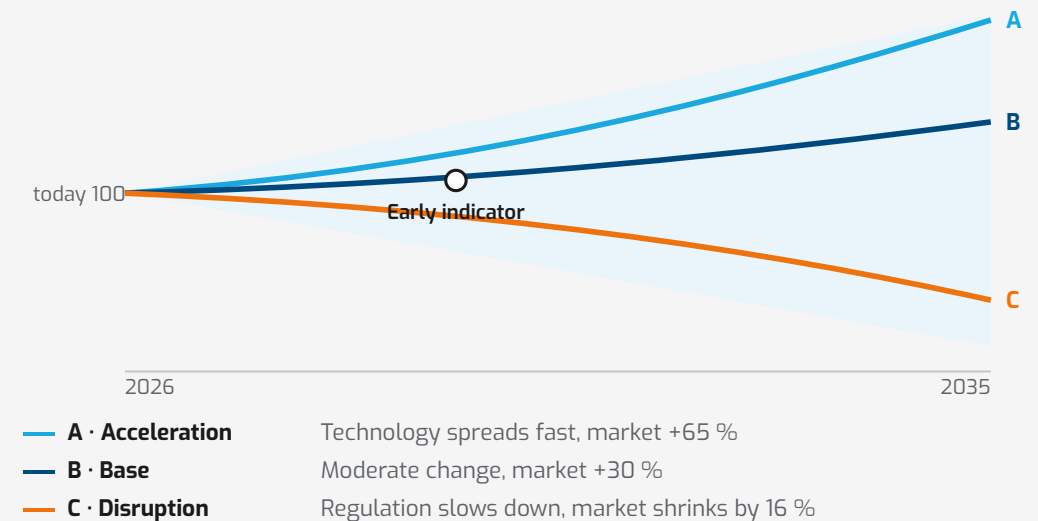
Environmental scanning Scenario technique Delphi survey Backcasting

Applications

Strategy 2035 Investments Future of an industry Association positioning

Scenario funnel · Market volume indexed

ILLUSTRATIVE



What does it do? And what is it worth?

Typical questions

- Which effects can be expected based on current evidence?
- What does it cost or save the health system and the economy?
- How do the effects change with different uptake?
- How robust are the results to other assumptions?

Methods

Evidence review Modelling in QALY and DALY Microsimulation Sensitivity analysis

Applications

Health economics Macroeconomic effects Regulatory impact Economic footprint

Impact chain · Model logic

METHODOLOGY

1

Product or measure

e.g. switching, prevention, regulation

2

Behaviour

Uptake in the population

3

Health

Burden of disease in QALY and DALY

4

Costs

Health system in euros

5

Economy

Productivity, working time, value added

Every stage documented with source and assumption. Scenarios and sensitivity analyses show the range.

One method toolkit.

Assembled around the question.

BLOCK	METHOD	MARKET	FORESIGHT	IMPACT
EVIDENCE	Secondary analysis and desk research	●	●	●
EVIDENCE	International evidence review	○	●	●
VOICES	Expert interviews, analysed after Mayring	●	●	●
VOICES	Interviews with customers and non customers	●	○	○
VOICES	Quantitative survey	●	●	○
VOICES	Delphi survey	○	●	○
MODEL	Market model top down and bottom up	●	○	○
MODEL	Scenario technique and backcasting	○	●	●
MODEL	Modelling in QALY and DALY	○	○	●
MODEL	Microsimulation	○	●	●
MODEL	Sensitivity analysis	●	●	●

Triangulation

Every study combines at least two of the three blocks evidence, voices and model. Contradictions are resolved and reported, not smoothed over.

Documentation

Sources, assumptions, interview guides and calculations come with every study. Third parties can trace every result.

● used regularly ○ if needed

Basis for decisions or reference study. Same method, two effects.

Your own numbers are seen as biased outside. **Open methodology and external review hold up.**

Anyone who wants to take a study into policy processes, stakeholder dialogue or the public needs more depth and external quality assurance. We agree on the intended use before the start.

	BASIS FOR DECISIONS · CONFIDENTIAL		REFERENCE STUDY · PUBLISHABLE
GOAL	Solid basis for strategy and investment	→	Reference study for policymakers, stakeholders and the public
READERS	Shareholders, advisory board, management	→	Policymakers, payers, associations, media
METHODS CHAPTER	condensed	→	detailed, with sensitivities and limitations
INTERVIEWS	summarised	→	in depth analysis with quotes
QUALITY ASSURANCE	internal review, expert validation	→	university partner, academic quality assurance
PRESENTATION	study report and results session	→	ready for publication, with model graphics and summary

Six principles. So a study holds up under scrutiny.

01

Open outcome

The result is not fixed when we accept the assignment. We do not take on assignments with an expected outcome.

02

Methodological control

We agree question and design together. The institute is responsible for analysis and conclusions.

03

Transparency

Published studies name the client, partners and funding.

04

Open assumptions

Sources, assumptions and calculations are documented and traceable for third parties.

05

Limits stated

Every study reports its limitations and the uncertainty of its results.

06

External review

Reference studies are reviewed by a university partner or independent experts.

IMPACT

CHEERS 2022 for health economic evaluations

FORESIGHT

Standards and quality criteria of futures research

SURVEY

ISO 2052:2026 for market and social research

INTERVIEWS

Qualitative content analysis after Mayring

IWCI follows these standards. It is not certified.

Three formats. Fixed scope, fixed fee. Plus modules for use.

UP TO 4 WEEKS

Study light

What do I need to know before I decide?

One clearly defined question. Desk research, selected expert interviews and a recommendation.

WHEN	Quick decision
OUTPUT	Short study and results session

2 TO 3 MONTHS

Study complete

Where is the potential, and how do we capture it?

The full study with primary research, model or scenarios and prioritised recommendations.

WHEN	Strategy, market entry
OUTPUT	Study report and presentation

3 TO 6 MONTHS

Study enterprise

Does the evidence hold up to public scrutiny?

For several markets or as a reference study. With university partner, modelling and sensitivities.

WHEN	Policy, associations, insurers
OUTPUT	Publishable study

OPTIONAL

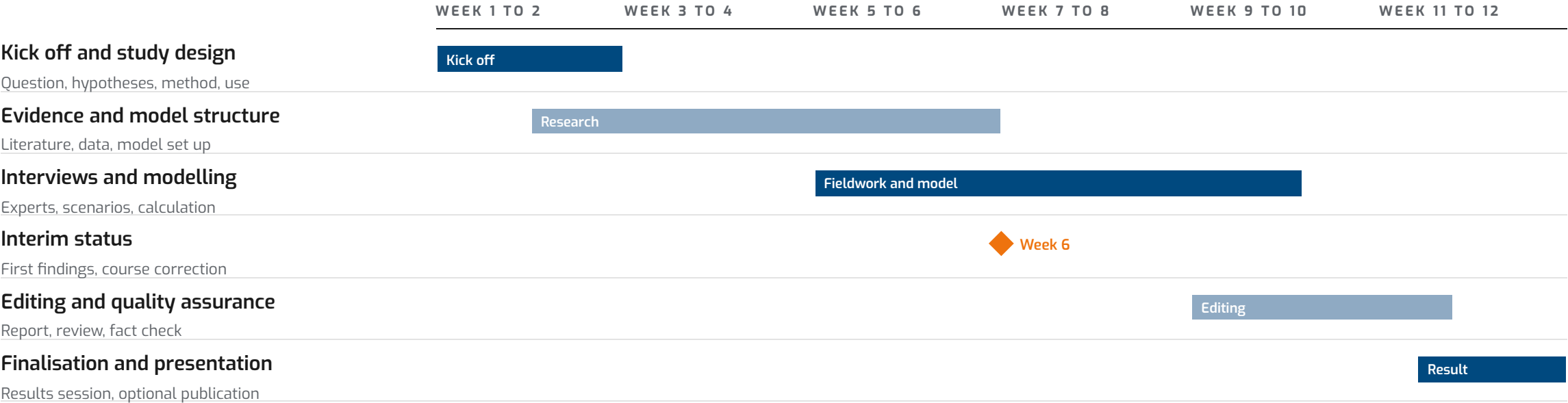
Modules for use

How do I bring the study into the debate?

Two page policy brief, presentation of the study, workshop on messages and stakeholders.

WHEN	After completion
OUTPUT	Brief, talk, workshop

From the question to the study in twelve weeks.



Design before the start
Question, method, sources and use are agreed in writing before fieldwork begins.

Status every two weeks
30 minutes with your project team. Findings, open questions, next steps.

Confidential by design
Interviews under NDA and anonymised. Nobody is quoted who does not want to be quoted.

The answer comes first. The evidence behind it.

Standard structure of an IWCI study report

STRUCTURE

1	Executive summary	Answer and recommendations on two pages
2	Context and objective	Occasion, guiding question, scope
3	Empirical basis	Evidence, data, sources
4	Model and scenarios	Quantification with sensitivities
5	Expert perspectives	Interviews, systematically analysed
6	Conclusions and recommendations	Prioritised by impact
7	Methodology and limitations	Assumptions, limits, open questions

Deliverables

Study report

Fully documented, traceable for third parties

Model and data appendix

Can be rerun with your assumptions

Graphics

Scenarios and model assumptions visualised

Results session

Presented and defended in front of your board

Evidence, not claims. Three studies, three effects.

200,000

simulated life courses in an impact study

€15bn to €75bn

savings potential 2026 to 2040 in three scenarios

2030

vision of customer service for Deutsche Telekom

Top rankings

in independent comparisons after a market study

IMPACT STUDY

Tobacco harm reduction

ELFBAR

Reference study with university partner, published 2026.

Impact Basis for a policy roundtable on harm reduction.

FORESIGHT STUDY

Customer service 2030

Deutsche Telekom

Vision of AI in audio and video, six weeks.

Impact Adjusted customer service strategy.

MARKET STUDY

Customer needs and differentiation

Financial services provider, anonymised

Quantitative and qualitative research over three months.

Impact New communication strategy, more customers, top rankings in comparisons.

Each study type backed by a real project. Further studies are confidential and available on request.

200,000 life courses up to 2040. What switching to vaping could save.

CLIENT

HG Innovation Limited
(ELFBAR)

STUDY TYPE

Impact study, health
economics

PARTNER

IU International University
of Applied Sciences

USE

Reference study, published
April 2026

FUNDING

Commissioned study,
funded by HG Innovation
Limited

The question

What would be the health and economic consequences of smokers in Germany switching to vaping? The answer had to hold up in front of policymakers, experts and the media.

What we did

- Evidence review and benchmarks from the UK, New Zealand and Sweden
- Microsimulation of 200,000 synthetic life courses
- Three switching scenarios, 2026 to 2040
- Quality assurance Prof. Dr. Florian Hummel, modelling Dr. Bernhard Schropp

Savings potential 2026 to 2040

MODEL

Conservative		€15bn
Realistic		€48bn
Optimistic		€75bn

Direct healthcare costs, three scenarios. Source: IWCI, IU International University (2026), published on elfbar.de

Impact. In the model, the burden of disease falls by 8 to 10 % with moderate switching. The study led to a policy roundtable on harm reduction in Germany.

[Read the study \(PDF, German\) →](#) [Published by ELFBAR →](#)

Customer service 2030.

What AI changes in audio and video.

CLIENT
Deutsche Telekom

STUDY TYPE
Foresight study

DURATION
six weeks

TIME HORIZON
2030

USE
Basis for decisions

The question

How will customer service change by 2030 when AI understands speech and images? And which measures does one of Europe's largest telecommunications groups need to take today to stand out from the competition?

What we did

- Benchmarking against the industry and pioneers from other industries
- Desk research on trends in audio and video
- Interviews to validate customer needs
- Condensed into a vision for 2030

Result. Customer needs, trends, differentiation and a list of measures. The group adjusted its customer service strategy accordingly.

Study architecture in six weeks

APPROACH

- | | | |
|---|--|--------|
| 1 | Benchmarking
Industry and pioneers from other industries | Week 2 |
| 2 | Desk research
Technological and social trends | Week 3 |
| 3 | Interviews
Validation of customer needs | Week 5 |
| 4 | Vision 2030
Differentiation and list of measures | Week 6 |

Lens 1 · AI in audio

Lens 2 · AI in video

Study contents confidential.

Twelve examples. Your question is the thirteenth.

Market study

Market entry DACH

Which volume and which channels are open?

New business area

Does the potential justify the investment?

Price and channel in B2B

Where does a supplier lose margin and customers?

Heritage brand

How do customers and non customers see the brand today?

Foresight study

Retail 2035

What role is left for brick and mortar sales?

AI in sales

Which tasks will shift by 2030?

Regulated markets

How do regulatory scenarios change demand?

World of work 2035

How will an industry's need for skilled staff develop?

Impact study

Harm reduction

What does substitution save the health system?

Prevention

Does a programme pay off for insurers and employers?

Economic footprint

Which value added and jobs does an industry secure?

Regulatory impact

What does a ban cost, what does legalisation bring?

An independent institute. With method and judgment.

IWCI, the Institute for Growth Opportunities and Innovation, gives shareholders and management a neutral view on markets and companies. **Clear in its judgement, backed by operating experience.**

A core team of five, a network of former board members, executives and professors per study, and academic partners for method and quality assurance. IWCI is a company of Dominic Multerer GmbH.

15

years C level interim
experience

5

core team plus expert
network

16

cities IWCI has worked in

3

academic partners



Dominic Multerer

Managing Director
Prof. h. c. (AEU, KH) · Dr. h. c. (IIC, KH)

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- Mandates in growth, turnaround and transformation
 - Impact study published with IU International University
 - Founder of the Klartext method
 - Personally responsible for every study

Clients of IWCI and its founder.

And academic partners.

SELECTED CLIENTS

						
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ACADEMIC PARTNERS

 iu INTERNATIONALE HOCHSCHULE	 CBS INTERNATIONAL BUSINESS SCHOOL	 សាកលវិទ្យាល័យ អាស៊ី អឺរ៉ុប ASIA EURO UNIVERSITY 亞 歐 大 学 វិទ្យាស្ថាន អូឡាំពិក អាស៊ី អឺរ៉ុប
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FOUNDER FEATURED IN

Handelsblatt brand eins impulse marconomy

Many commissioned studies are confidential. Published studies and reference calls on request in a personal conversation.

YOUR NEXT STEP



Which question should your study answer?

Send us the question, the occasion and how you plan to use the results. Within a few days you get a proposal on study type, method, duration and fee.

YOUR CONTACT

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