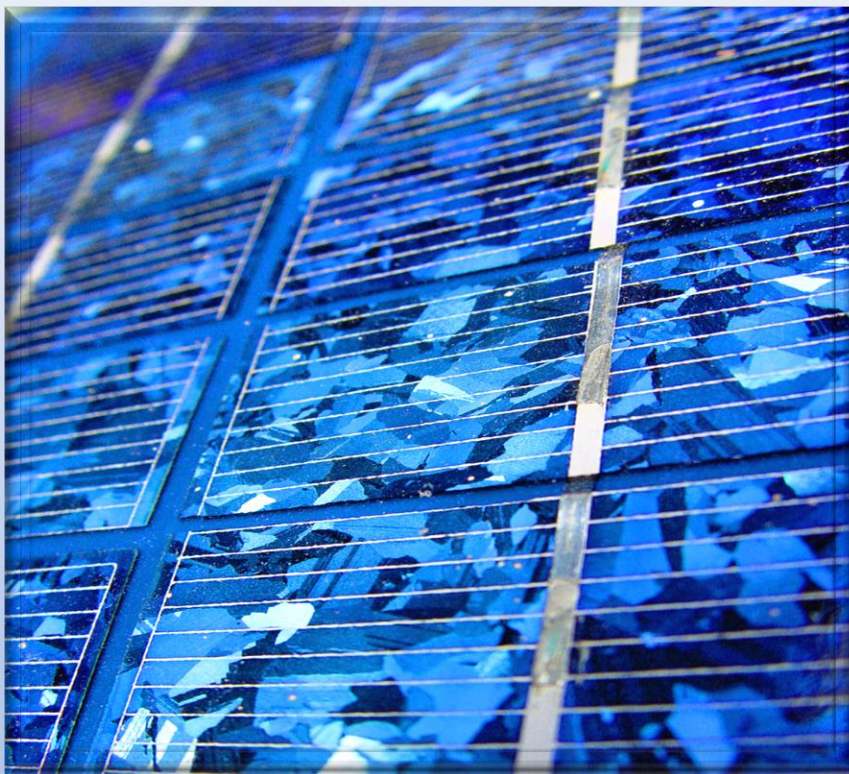


# Proposed Global & India Market Research Analysis & Demand Assessment of Polysilicon & Monosilane



Prepared For



Prepared By



TSR/ 2022/396  
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**PRINCIPAL SCOPE OF WORK  
OFFERED BY TECHSCI  
RESEARCH**

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## RESEARCH METHODOLOGY



The recommended methodology for this study is based on exhaustive Secondary Research followed by extensive Primary Research. TechSci Research will deploy a dedicated team who will work dedicatedly for the Client to meet research objectives.

## Phase-I: Secondary Search

- The team will conduct exhaustive secondary research to collect the information on required set of data /information through sources such as Manufacturers, End Use Industry Personnel, UNCTAD, Industry Associations , e.g., SEMI, SIA, Eurosil, ASASP, etc.

## Phase-II: Formulating Questionnaire & Developing List of Respondents

- Based on understanding will be developed though secondary Search, TechSci team will formulate a guideline and develop list of respondents to ask specific questions related with the project objectives for each type of stakeholders (Manufacturers,Traders, End User Regulatory Organisations/ Associations and Industry experts)

## Phase-III: Extensive Primary Search

- TechSci Research will execute primary surveys targeting key participants including industry experts through Telephonic methodology. TechSci Research will perform periodical checks on data being collected through field surveys with logic checks and analyze survey results

**Below mentioned is the number of surveys that would be conducted during the study :**

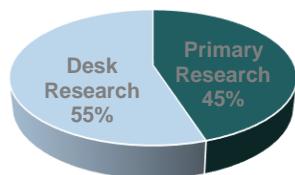
Table 1						
Region	Polysilicon & Monosilane Manufacturers/ Suppliers	Importers & Distributors	End Users	Regulatory Organizations and Associations	Industry Experts	Total
Americas	3	8	8	1	2	22
Europe	5	8	10	1	2	26
Asia Pacific	8	10	15	1	2	36
Middle East & Africa	3	5	5	1	1	15

**We do multiple interviews in one organisation at different levels (Mid-Senior) Level management Personnel**

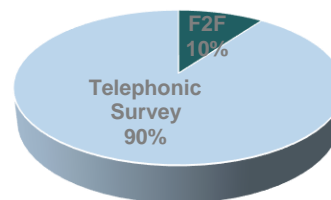
## Phase-IV Market Size Estimation, Demand Assessment, Data Triangulation

- The intended market assessment of Polysilicon and Monosilane will be deduced from the following steps:-
  - Determination of Global and India market in for the said products will be referred from industry leader opinions and feedbacks, official statistics from industry associations on aggregate levels
  - Initial Level of demand assessment will be gained through production capacities by volume via individual production capacities/ actuals in 2021
  - Triangulation of Data from global to regional levels and vice versa coupled with data validations to eliminate major anomalies from actual figures and maintain the average estimates under tolerance ranges of  $\pm 10\%$
  - Pricing will be taken per tonnage of material as per end –user procurement price
  - Referring company overall revenues and derivation of product specific revenues as stated in annual reports, investor presentations, primary transcripts
  - The abovementioned procedures will also be followed specifically for Global, regional Market Aggregate Levels and India market share

### Research Contribution



### Survey Mode



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## Phase-V: Analysis of Information Developed and Submission of Report

- TechSci will do the analysis of collected set of information for target products and summarize key findings to be submitted to client in the form of Report

## Partial List of Companies to be Interviewed and Information to be Referred

- Wacker Chemie AG
- Targray
- OCI
- Hemlock Semiconductor Corporation
- Mitsubishi-Gelest
- LDK Solar Co. Ltd.
- Intel
- REC Silicon ASA
- Elkem
- Others

## Partial List of Key Secondary Sources to be Considered





- World Bank, IMF
- UNCTAD, ITC
- USGS
- Industry Association Reports (SEMI, SIA, Silicon Europe, APVIA)
- TechSci Research Proprietary Database & Knowledge Repository
- Company Annual Reports, Investor Presentations & SEC Filings
- Industry Magazines & Trade Journals
- News Dailies
- Credible Paid Databases (MorningStar, Hoovers, SEMI, Volza, Zauba, Solar Energy Industries Association and others\*\*) *\*\* other sources wherever applicable will be utilized and mentioned during the actual course of research*



## DELIVERABLE TIMELINE



# Project Execution Plan

					Draft Report		Final Report	
Working Weeks	1	2	3	4	5	6	7	
Project Initiation								
Project team set-up								
Project kickoff meeting with key stakeholders								
Content and report generation								
Data collection & secondary research								
Template development								
Contact list development								
Develop and validate the discussion guide								
Primary interviews among all industry participants								
Collect and validate data from primary data source								
Report writing								
Analysis & Deliverable								
Interim deliverable of Principal Scope								
Initial Draft Report of Principal Scope								
Final deliverable								
Completion & Follow up								

## Note:

The above-mentioned timelines do not include time required by Client's management for approval of questionnaires, feedback on interim reports, setting up meetings between Client and TechSci Research because it would depend upon the availability of Client's management.