

2025 Q2 *Market Research & Evaluation* *Quarterly Newsletter*

WHAT'S NEW:



Hello everyone!

It's starting to feel like summer here in Portland! The slightly slower pace of summer is a time when many of NEEA's market research and evaluation studies are winding down. This newsletter highlights quite a few studies that will be finalized in the coming months, including market progress evaluations for the Luminaire Level Lighting Controls, High-Performance HVAC, and Efficient Rooftop Units programs. Two additional reports will be available soon that describe third party assessments of NEEA's key modeling assumptions used to estimate energy savings associated with NEEA and our partners' work in the market for building energy codes.

It is also worth mentioning two interesting market research efforts that are underway. The Agricultural Pumps Market Research effort is exploring market barriers and other aspects of the regional market for agricultural irrigation pumps across the Northwest. Additionally, NEEA's Commercial HVAC programs are conducting a market research effort to understand how the market for gas very high efficiency dedicated outdoor air systems (DOAS) compares with that of electric very high efficiency DOAS.

Lots on the horizon! Enjoy the newsletter and please reach out with any questions or suggestions.

Sincerely,
Amy Webb




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| | | | PLANNING* | FIELDING** | REPORTING*** |
|---------------------------|---|---|-----------|------------|--------------|
| Integrated Systems | Advanced Heat Pumps & Dual-Fuel Residential HVAC: <i>Installation Contractor Market Research</i> |  | | ✓ | |
| | Advanced Heat Pumps: <i>Market Progress Evaluation Report #1</i> | | | ✓ | |
| | Efficient Fans: <i>Fan Manufacturer Representative and Specifier Market Research</i> | | | ✓ | |
| | Efficient Rooftop Units (RTU): <i>Market Progress Evaluation Report #1</i> |  | | | ✓ |
| | Extended Motor Products (XMP): <i>Agricultural Pumps Market Research</i> | | | ✓ | |
| | Extended Motor Products (XMP): <i>Market Progress Evaluation Report #2</i> | | ✓ | | |
| | High-Performance HVAC: <i>Gas High Efficiency DOAS Specifier Market Research</i> |  | | ✓ | |
| | High-Performance HVAC: <i>Market Progress Evaluation Report #1</i> | | | | ✓ |
| | Luminaire Level Lighting Controls (LLLC): <i>Exterior Luminaire Level Lighting Controls in Parking Lots Market Research Study</i> | | | | ✓ |
| | Luminaire Level Lighting Controls (LLLC): <i>Market Progress Evaluation Report #3</i> | | | | ✓ |
| | Motor-Driven Systems: <i>Industrial Market Research</i> | | ✓ | | |
| | Whole Building Special Project: <i>Commercial Whole Buildings Implementation and Market Research</i> | | | ✓ | |
| Products | Heat Pump Water Heaters (HPWH): <i>Market Progress Evaluation Report #8</i> | | | ✓ | |
| | Retail Product Portfolio (RPP): <i>Market Progress Evaluation Report #3</i> | | | ✓ | |
| | Retail Product Portfolio (RPP): <i>Televisions Model Review</i> | | | ✓ | |

Dual-Fuel (Electric & Natural Gas) Projects: Natural Gas Projects: * **PLANNING:** MRE projects from inception through proposal selection** **FIELDING:** MRE projects from kick-off through the completion of field work*** **REPORTING:** MRE projects in the analysis/synthesis stage through report posting

| | | PLANNING* | FIELDING** | REPORTING*** |
|---|--|-----------|------------|--------------|
| Codes, Standards, New Construction | Codes: <i>Code Savings Technical Assumptions Review</i> | | | ✓ |
| | Codes: <i>Market Progress Evaluation Report #6</i> | | ✓ | |
| | Codes: <i>NEEA Codes Baseline and Assumptions Review</i> | | | ✓ |
| | Commercial Codes: <i>Idaho Commercial New Construction Code Compliance Evaluation</i> | | ✓ | |
| | Residential Codes: <i>Montana Residential Code Compliance Evaluation</i>   | | | ✓ |
| | Residential Codes: <i>Oregon Residential Code Compliance Evaluation</i>   | | | ✓ |
| | Standards: <i>Portable AC and Air Compressor Standards Evaluations</i> | | | ✓ |
| Market Diffusion | Ductless Heat Pumps (DHP): <i>Ductless Heat Pump Market Diffusion Evaluation, Year 3</i> | | | ✓ |

Dual-Fuel (Electric & Natural Gas) Projects:  Natural Gas Projects: * **PLANNING:** MRE projects from inception through proposal selection** **FIELDING:** MRE projects from kick-off through the completion of field work*** **REPORTING:** MRE projects in the analysis/synthesis stage through report posting



Installation Contractor Market Research

Advanced Heat Pumps & Dual-Fuel Residential HVAC

FIELDING

NEEA is planning to conduct market research with residential HVAC installation contractors to inform strategy for the active Advanced Heat Pump program and support a potential Dual-Fuel HVAC program that is currently in the concept development phase of NEEA's initiative lifecycle. NEEA staff are still refining the research objectives for this research, which will include an assessment of installer perspectives on commissioning and minimizing supplemental heat, among other topics.

This work will kick off in Q3 2025 and conclude in Q1 2026.

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Market Progress Evaluation Report #1

Advanced Heat Pumps

FIELDING

NEEA is planning to conduct the first MPER for the Advanced Heat Pump program. NEEA staff are still refining the research objectives for this research, but it will include an assessment of the extent to which the program is making progress toward achieving market outcomes associated with activities conducted in the program's first two years.

This work will kick off in Q3 2025 and conclude in Q2 2026.

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Fan Manufacturer Representative and Specifier Market Research

Efficient Fans

FIELDING

NEEA contracted with DNV Energy Insights, Inc. to conduct a market research study in support of continued refinement of the Efficient Fans program's design and intervention strategy. The study focuses specifically on addressing the following objectives:

- Compile a robust list of Commercial and Industrial (C&I) stand-alone fan manufacturer representatives and specifying engineers active in the four-state region (ID, MT, OR, and WA).
- Identify and document key communication and relationship dynamics between fan system market actors (including particularly influential sources of information).
- Identify and document persistent challenges endemic to the stand-alone fan specification, sale, and installation process as experienced by manufacturer representatives and specifying engineers; and
- Solicit input from regionally active stand-alone fan manufacturer representatives and specifying engineers regarding the clarity, sensibility, and appropriateness of programmatic language and terminology related to in-scope fan systems.

The study kicked off in December 2024. Instrument development, sample preparation, and respondent recruitment were completed in early Q2 2025, with data collection (specifically in-depth interviews with relevant market actors) scheduled to continue through Q2 2025. Data analysis and report preparation are scheduled for late Q2–early Q3 2025. The final report is anticipated in Q3 2025.

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Market Progress Evaluation Report #1

Efficient Rooftop Units (RTU)

REPORTING

NEEA's Efficient RTU program is actively working to transform the market for efficient RTUs in gas-heated commercial buildings across the region. This study is the first evaluation of the program's Market Transformation efforts. The program's overarching objectives for the study are to:

- Provide timely and actionable formative evaluation findings and recommendations to enable continuous improvement of the program.
- Assess market transformation progress as measured by program Market Progress Indicators (MPIs).
- Qualitatively assess program influence on observed market transformation.

NEEA contracted with Apex Analytics and NMR Group to conduct the evaluation which began in June 2023. The evaluation team conducted focus groups with two small groups of commercial building decision makers (e.g., building owners, operators, and facilities managers); surveyed commercial building decision makers across the region; and interviewed individuals who have or have considered having an efficient RTU on their building. In late 2024, the evaluation team conducted focused interviews with a small number of manufacturer representatives active in the Northwest RTU market.

Data collection wrapped up in March 2025, and a draft report was delivered in mid Q2. Key findings include the need to more clearly distinguish interventions for bolt-on vs integrated Energy Recovery Ventilators (ERVs) and insight that efficient RTUs are seen by the market as niche products instead of replacement products.

A final report is anticipated in Q3 2025.

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Agricultural Pumps Market Research

Extended Motor Products (XMP)

FIELDING

To support ongoing program planning and opportunity assessment for the XMP - Pumps program, NEEA contracted with Resource Innovations to field a research study exploring the dynamics of the agricultural pump market across NEEA's four-state region. Specific objectives of this study are to:

- Identify and prioritize agricultural market barriers to uptake of highly efficient pumps for irrigation purposes.
- Document market actor motivations and agricultural irrigation pump path-to-purchase.
- Assess the accuracy of key market projections documented in NEEA's 2013 Agricultural Irrigation Market Characterization, specifically as pertaining to regional irrigated agricultural acreage and market actor technology usage.

The study kicked off in Q4 2024, with instrument development and sample preparation completed in Q1 2025 and respondent recruitment currently underway. Study methods include a robust literature review paired with in-depth interviews with members of key agricultural professionals (manufacturers and representatives, specifying engineers, contractors, and end users) to seek input and insight from professionals active in the agricultural pump market. Primary data collection is scheduled to run through Q2 2025, followed by data analysis and report preparation. The final report is anticipated in Q3 2025.

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Market Progress Evaluation Report #2

Extended Motor Products (XMP)

PLANNING

NEEA's XMP - Pumps program is actively engaging with manufacturers' representatives, trade associations, and other market actors to increase adoption of energy-efficient motor-driven products (specifically clean-water pumps and circulators at or below 50 horsepower) across the four-state Northwest region. This MPER will be the second evaluation of the program's Market Transformation efforts and will build on findings from the recently completed MPER #1, which is available on neea.org. Study objectives are to:

- Build on the results of XMP MPER #1, by conducting the second cycle of tracking MPIs and reporting progress on near-term outcomes.
- Conduct formative evaluation of market actor perceptions and attitudes (particularly trust and perceived relevance) regarding the Hydraulic Institute's Energy Rating (HI ER) label for pumps and circulators.

The study is anticipated to kick off mid-Q3 2025. Specific methodologies are likely to include, at a minimum, a combination of survey questionnaires and in-depth interviews. The evaluation will be ongoing through Q2 2026, with a final report anticipated in late Q2 or early Q3 2026.

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Gas High Efficiency DOAS Specifier Market Research

High-Performance HVAC

FIELDING

To support potential expansion of the High-Performance HVAC program to include Gas High Efficiency Dedicated Outdoor Air Systems (DOAS), NEEA contracted with OWL Research Partners to field a research study, which kicked off in Q2, to explore market barriers to adoption and supply chain perspectives. The program's overarching objectives for the study are to:

- Confirm which opportunities and barriers previously identified for the uptake of very high efficiency DOAS also apply to gas high efficiency DOAS, and identify any additional barriers and opportunities specific to gas high efficiency DOAS.
- Gather specifiers' perspectives on advantages, disadvantages, and use cases of potential gas high efficiency DOAS configurations.
- Describe building types, market actors, early adopters, value proposition and decision processes for gas high efficiency DOAS highlighting how they differ from all-electric very high efficiency DOAS.

Study methods will include a survey and in-depth interviews with specifiers, and asynchronous reviews of promising gas high efficiency DOAS configurations. A final report is anticipated in Q3 2025.

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Market Progress Evaluation Report #1

High-Performance HVAC

REPORTING

NEEA's High-Performance HVAC program is intervening to transform the market for very high efficiency Dedicated Outside Air Systems (DOAS) for electrically heated commercial buildings across the region. This study is the first evaluation of the program's Market Transformation efforts. The program's overarching objectives for the study were to:

- Provide timely and actionable formative evaluation findings and recommendations to enable continuous improvement of the program.
- Assess market transformation progress as measured by program MPIS.
- Qualitatively assess program influence on observed market transformation.

NEEA contracted with Apex Analytics and NMR Group to conduct the evaluation, which kicked off in July 2023 and included expert review of NEEA materials, HVAC designer interviews, observation of NEEA trainings and fast-feedback surveys with NEEA trainees, designer survey, web scan and web traffic review, and document review.

Data collection wrapped up in March 2025, and a draft report was delivered in mid Q2. Key findings include that there is generally high awareness of the benefits of the VHE DOAS approach among specifiers. VHE DOAS materials have started to proliferate out to other organizations and websites, but there are some key partners and organizations that aren't yet sharing materials that align with NEEA's approach.

A final report will be posted to neea.org in early Q3.

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Exterior Luminaire Level Lighting Controls in Parking Lots Market Research Study

Luminaire Level Lighting Controls (LLLC)

REPORTING

NEEA is considering adding exterior LLLC in parking lots to the LLLC program. To support this, NEEA contracted with Cadmus to conduct interviews with parking lot lighting installers and purchasers between Q4 2024 and Q1 2025.

This study sought to:

- Determine and describe all items that trigger a parking lot lighting replacement or upgrade decision, as well as what factors go into the upgrade and/or replacement decision, so that NEEA can assess alignment of exterior LLLC with its existing LLLC program.
- Assess the known and potential benefits of LLLC systems compared with other lighting solutions to assist NEEA in refining the value proposition for installing LLLC in exterior parking lots.

A report is available on [neea.org](https://www.neea.org).

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Market Progress Evaluation Report #3

Luminaire Level Lighting Controls (LLLC)

REPORTING

In late 2024, NEEA contracted with Cadmus to complete its third Market Progress Evaluation Report (MPER) for the LLLC program. This evaluation follows the program's [second MPER](#), published in 2023, and is crucial for tracking changes in the market that indicate whether the LLLC program is effective in overcoming identified market barriers.

Interviews and surveys were collected between Q4 2024 and Q1 2025 with stakeholders, manufacturers, installers, designers, architects, engineers, and commercial building decision makers to address the following objectives:

- Review and verify that the LLLC program has conducted the strategic activities described in its quarterly progress tracking documents and outlined in its logic model since the previous MPER.
- Track identified Market Progress Indicators (MPIs) focused on measuring the reduction of identified market barriers and conduct year-over-year analyses when indicated, in order to report progress on several program outcomes predicted by the logic model.
- Conduct market research to describe the rationale of buyers and sellers of LLLC that include it in their initial project plans, but do not follow through with the sale.

A final report is anticipated in Q3 2025.

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Industrial Market Research

Motor-Driven Systems

PLANNING

NEEA plans to field a study of the dynamics of the regional industrial market to increase market insight across programs within the Motor-Driven Systems Product Group (including Efficient Fans and Extended Motor Products) and to inform opportunity assessment related to adjustable-speed drives. Specific objectives of this study are under development but may include assessment of market actor relationships, decision-making factors related to selection of relevant products, and identification of market barriers distinct to the industrial sector. Project kickoff is anticipated in Q3 2025.

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Commercial Whole Building Implementation and Market Research

Whole Building Special Project

FIELDING

The vision for NEEA's Commercial Whole Building Special Project is to motivate the commercial building sector to undertake deep energy efficiency retrofits in a way that is widely available, scalable, and affordable for owners and occupants. To better understand this market, NEEA plans to conduct market research with key commercial market actors to support the Whole Building Special Project. Research objectives are still being finalized, but are likely to include:

- Gathering and synthesizing insights into how building owners and asset managers, with their financial and project consultants, plan for and finance operations and maintenance (O&M) and capital expenditures.
- Conducting design research to test market transformation concepts with target market actors that can be implemented as part of the Whole Building Special Project effort.

This study will build on the recent BetterBricks [Commercial Buildings Decision Maker](#) study. Study kickoff is expected in Q3 2025.

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Market Progress Evaluation Report #8

Heat Pump Water Heaters

FIELDING

NEEA contracted with the NMR Group in Q1 2025 to conduct the eighth HPWH MPER. The MPER will track program progress toward its predefined market outcomes over the last 18 months. Specific study objectives include:

- Reviewing and verifying that the program has conducted the strategic activities it set out to complete in 2024.
- Tracking identified Market Progress Indicators (MPIs) focused on measuring a specified set of program outcomes per the program logic model.
- Identifying nature and prevalence of callbacks to discern how that impacts installers in recommending and installing HPWHs.

Data collection activities and analysis will continue through the end of Q3 2025, resulting in a final report expected by the end of 2025.

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Market Progress Evaluation Report #3

Retail Product Portfolio (RPP)

FIELDING

NEEA is planning its third RPP MPER. The objectives of this study (which builds on results from the [second MPER](#)) are to:

- Document activities and outputs for each product in NEEA's RPP portfolio (clothes washers, clothes dryers, all-in-one washer/dryer combinations, refrigerators, room air conditioners, and televisions) and assess progress on applicable outcomes through MPIs.
- Explore how program activities have influenced manufacturers since the program's inception and recommend how this influence could be assessed in consistent and cost-effective ways beyond those already listed in the logic model, if applicable.

The RPP program provides mid-stream incentives to retailers for sales of qualifying efficient products, such as refrigerators and clothes washers, to influence retail assortment and product promotion, obtain access to sales data, and ultimately inform ENERGY STAR® specifications and/or federal standards and testing procedures.

This study will begin in Q2 2025 and a final report is expected in Q1 2026.

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Televisions Model Review

Retail Product Portfolio (RPP)

FIELDING

In Q3 2025, NEEA will review the RPP program modeling for reporting co-created energy savings for televisions. The report will also include a review of the RPP program's naturally occurring baselines and key modeling assumptions. The project is planned to begin in Q3 2025 with a final report in Q4 2025.

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Code Savings Technical Assumptions Review

Codes

REPORTING

NEEA contracted with Energy 350 to review three assumptions underlying the savings it reports for building energy code updates:

- Is NEEA's approach for splitting savings from the 2018 Washington State Energy Code – Residential for electric-only homes and homes with both electric and natural gas reasonable?
- Is NEEA's approach for aligning savings rates calculated for the residential 2021 International Energy Conservation Code (IECC) with Montana amendments with the 2018 IECC with Montana amendments reasonable?
- Is it reasonable for NEEA to use the commercial 2021 IECC with Montana amendments savings rates for reporting 2024 energy savings given the limited impact of amendments on commercial building energy use?

Energy 350 kicked off its review in December 2024 and the report is available on [neea.org](https://www.neea.org).

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Market Progress Evaluation Report #6

Codes

FIELDING

NEEA contracted with NMR Group, Inc., to field the sixth MPER for its commercial and residential codes efforts. This study is intended to build on and complement the learnings generated through the recently completed [Codes MPER #5](#) and will include ongoing assessment of NEEA's progress in the Northwest codes market relative to recently established MPIs. Specific objectives for the study are to:

- Assess NEEA's progress on selected logic model outcomes, including those associated with (a) the Codes team's training and education activities, (b) voluntary certification and above code construction, and (c) jurisdictional goals and state-level code support.
- Conduct a qualitative analysis of NEEA's progress on outcomes associated with its code influence activities conducted during code cycles occurring from 2018 onward, with a particular focus on code influence activities occurring from 2023 onward.
- Conduct formative evaluation regarding market actor awareness, use, and valuing of key code compliance tools, including the Washington State Energy Code Commercial Technical Support website and webtool, COMcheck, and REScheck.

A project kick-off was held in Q4 2024, with sample development and instrument preparation occurring from Q1 to Q2 2025. Data collection occurred in Q2 2025, including interviews with NEEA Codes program staff and a wide range of code market actors, as well as surveys with individuals who have completed NEEA-sponsored code trainings. Data analysis and initial report preparation are scheduled to occur in Q2 2025, with a final report anticipated in Q3 2025.

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NEEA Codes Baseline and Assumption Review

Codes

REPORTING

NEEA contracted with Industrial Economics (IEC) and Resource Refocus to conduct a third-party review of its Naturally Occurring Baselines for commercial and residential energy codes in the Northwest. Specifically, the study will:

- Assess whether NEEA's approach of tracking 100% of the Total Regional Savings as Co-Created Savings for 10 years after construction starts without applying an additional adjustment factor is still the most reasonable Natural Market Baseline for codes.
- If not, make recommendations for how NEEA should update its baseline and other assumptions to more accurately capture NEEA and its partners' influence on code changes in the Northwest.
- Assess whether it is appropriate to apply the same approach to all states in the Northwest and to both the residential and commercial sectors.

This project kicked off in Q4 2024, and the final report is expected in Q3 2025.

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Idaho Commercial New Construction Code Compliance Evaluation

Commercial Codes

FIELDING

The Idaho Commercial New Construction Code Evaluation study focuses on (a) assessing the path(s) by which and degree to which code compliance is achieved with the amended 2018 International Energy Conservation Code (IECC) in newly constructed buildings, and (b) measuring the energy performance of a subset of these buildings as compared with the average energy performance of buildings constructed under previous code. The results of the study will provide direction to the development and implementation efforts of the NEEA Codes team and will provide other regional code stakeholders guidance in targeting their energy efficiency work in the commercial new construction sector.

NEEA contracted with Opinion Dynamics to undertake this study. The study design and methodology selected for this project focuses on permit data and building plans as the primary sources of construction and compliance information, with virtual or in-person site visits planned for a subsample of participating buildings to validate the accuracy of permit data. The project kicked off in Q3 2023, with planning and sample development continuing through Q1 2024. Data collection focusing on desk review of permit data began in Q2 2024 and is scheduled to conclude in Q2 2025, with site visits to a subsample of buildings scheduled for Q2 2025. This study includes analysis of billing data. Collection of this data is planned to continue through Q3 2025, with analysis and report preparation to follow. A final report is anticipated in Q4 2025.

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Montana Residential Code Compliance Evaluation

Residential Codes

REPORTING

NEEA contracted with IEC to review assumptions underlying its estimation of energy savings resulting from NEEA's and its partners' involvement in the Montana state code processes. Using data collected through permit review, site visits to residential new construction building sites, and interviews with market actors, this research will address the following objectives:

- Assess statewide compliance with selected code requirements among single-family homes built under IECC 2018 and 2021 with Montana amendments.
- Develop estimates of statewide energy code compliance and compliance within urban and rural jurisdictions separately.
- Provide statewide findings regarding primary space and water heating fuel and above-code elements using data collected on individual code requirements.

This work kicked off in Q1 2023 but paused in mid-2023 due to challenges with collecting permit data. The project re-launched in January 2024 with a new data collection plan that relies on on-site data collection. The final report is available on neea.org.

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Oregon Residential Code Compliance Evaluation

Residential Codes

REPORTING

NEEA contracted with IEc to review assumptions underlying its estimation of energy savings resulting from NEEA's and its partners' involvement in the Oregon state code processes. This evaluation will:

- Assess statewide compliance among single-family homes built under the 2021 Oregon Residential Specialty Code (ORSC).
- Provide statewide findings regarding primary space and water heating fuel and above-code elements using data collected on individual code requirements.
- Provide an analysis of builders' choices regarding compliance pathways and efficiency level to which the home is built.

IEc will collect data from permits, conduct site visits to residential new construction building sites, and conduct interviews with market actors. In addition, NEEA contracted with NMR Group to collect and analyze data on inhabited homes using homeowner self-audits. This project kicked off in Q2 2024. The final report is expected in Q3 2025.

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Portable AC and Air Compressor Standards Evaluations

Standards

REPORTING

NEEA's Codes and Standards team engaged in efforts to increase the stringency of the federal standards for portable air conditioners and air compressors. NEEA contracted with Michaels Energy to conduct a qualitative assessment of NEEA's influence on the standards processes and provide a quantitative estimate of the share of savings resulting from the standards that are the result of NEEA and other efficiency organizations' efforts. Both evaluations kicked off in Q4 2024. Michaels Energy reviewed NEEA records and publicly available documents and conducted interviews with key stakeholders from NEEA, U.S. DOE and other organizations. Final reports for both studies are anticipated in Q3 2025.

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Ductless Heat Pump Market Diffusion Evaluation, Year 3

Ductless Heat Pumps

REPORTING

NEEA actively worked to accelerate adoption of Ductless Heat Pumps (DHP) in the Northwest from 2008 to 2020. Once NEEA scales back investments in a Market Transformation program, the organization continues to monitor market diffusion of the energy-efficient product or practice through a series of annual longitudinal evaluations called market diffusion evaluations. NEEA contracted with OWL Research Partners to conduct the third diffusion evaluation study for the DHP program. The study kicked off in Q4 2024. The objective for this evaluation, consistent with the prior two diffusion evaluation studies, was to track diffusion of DHPs across the Northwest's residential HVAC market, specifically within the program's three target markets (single family zonal, single family electric forced air, and manufactured homes with electric forced air) to confirm whether market transformation outcomes are being sustained.

A key activity of the study was to conduct phone surveys with HVAC installers. The HVAC installer survey sought to understand trends in DHP installations, the types of homes they are being installed in, the percentage of incented installations, total customer cost, and changes in the DHP market.

Findings of the third Market Diffusion Evaluation indicate that the residential DHP market is continuing to grow and gain market share over time. The specific results for the Diffusion Indicators and for target markets include:

- Single-family DHP installs are on the rise, but due to a combination of factors, target market growth has slowed.
- Total installed costs continue to increase due to labor costs (not equipment costs).
- The vast majority of HVAC installers in the Northwest (87%) offer DHPs.

The final report will be published on [neea.org](https://www.neea.org) in July.

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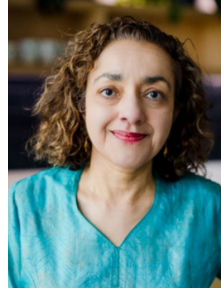
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