

THE NEW ENERGY LANDSCAPE

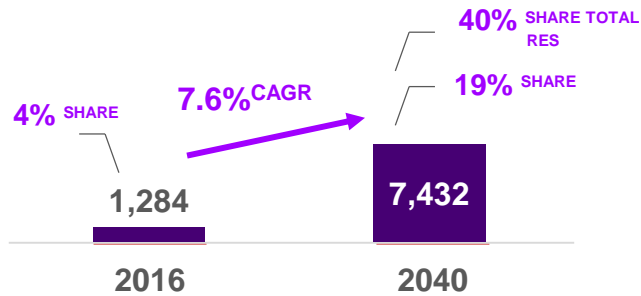
WYTSE KAASTRA

MANAGING DIRECTOR,
ACCENTURE

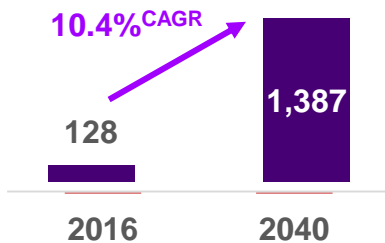
THE UTILITIES INDUSTRY IS IN THE MIDST OF EPIC DISRUPTION

SUPPLY DECARBONIZATION

Wind & Solar Production (TWh)¹

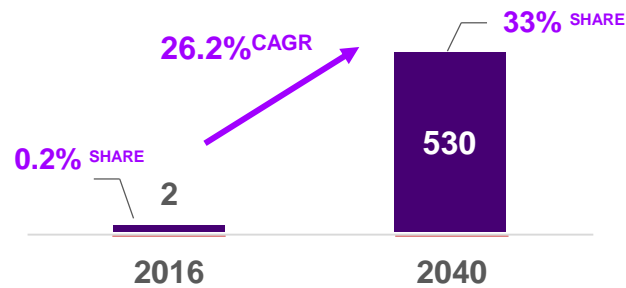


Small-scale PV (GW)²

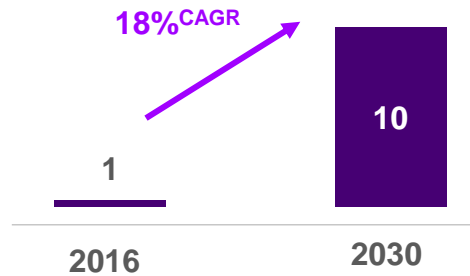


DEMAND ELECTRIFICATION

Global EV Fleet (Million Cars)^{1,4}



Heat pumps Europe (Million)



NEED FOR FLEXIBILITY IN 2030

**30-45%
extra Flexibility**

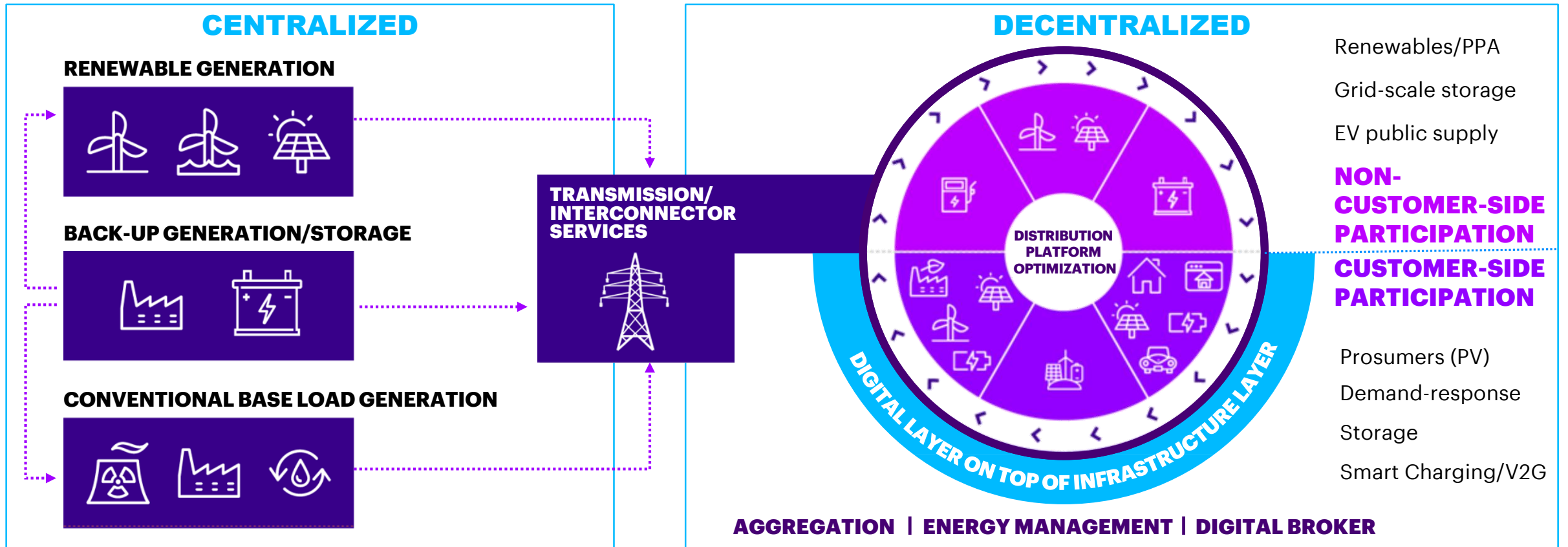
**20-30% fewer
operating hours**

More volatility

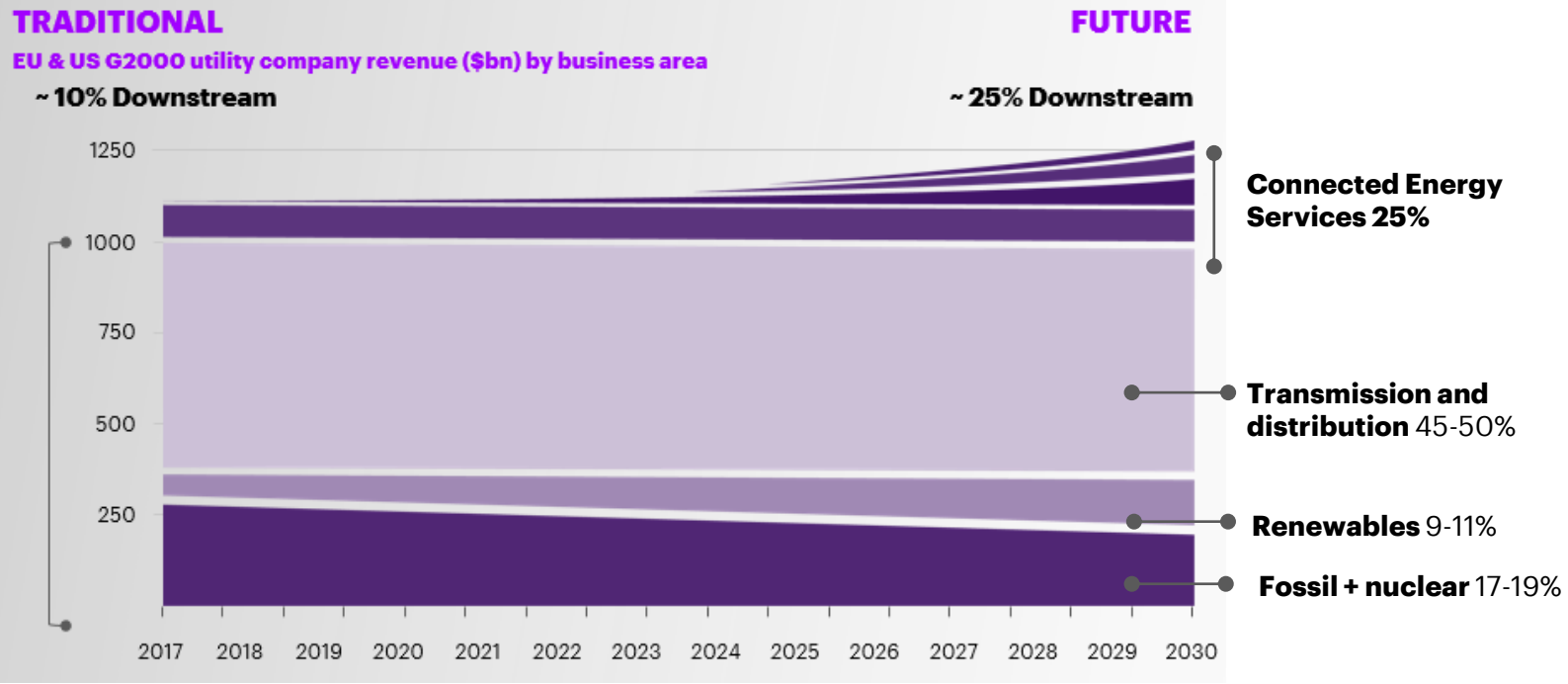
Sources: 1© OECD World Energy Outlook 2017, International Energy Agency—used by permission; 2“Digitalization of Energy Systems,” Bloomberg New Energy Finance, via Siemens, November 2017, www.siemens.com; 3Accenture estimates; 4“All Forecasts Signal Accelerating Demand for Electric Cars,” Bloomberg New Energy Finance, July 19, 2017; Accenture analysis.

IN LIGHT OF PERVASIVE TRENDS, A NEW POWER MODEL IS EMERGING

A HYBRID OF CENTRALIZED AND DECENTRALIZED, BIDIRECTIONAL ENERGY FLOW

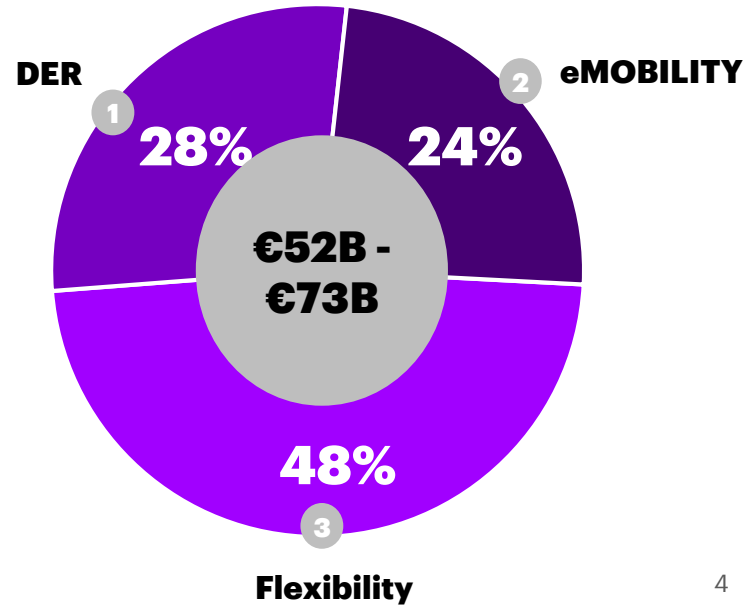


VALUE EXISTS BY INVESTING IN THE NEW CONNECTED ENERGY EXPERIENCE



**DOWNSTREAM
RISES TO
25%**

EUROPE MARKET SIZE



VOLKSWAGEN HAS SET UP “ELLI” TO PROVIDE GREEN POWER, EV CHARGING AND STORAGE SOLUTIONS

Beyond Tesla, traditional automakers are positioning to manage all customer needs at the interface between energy and mobility.

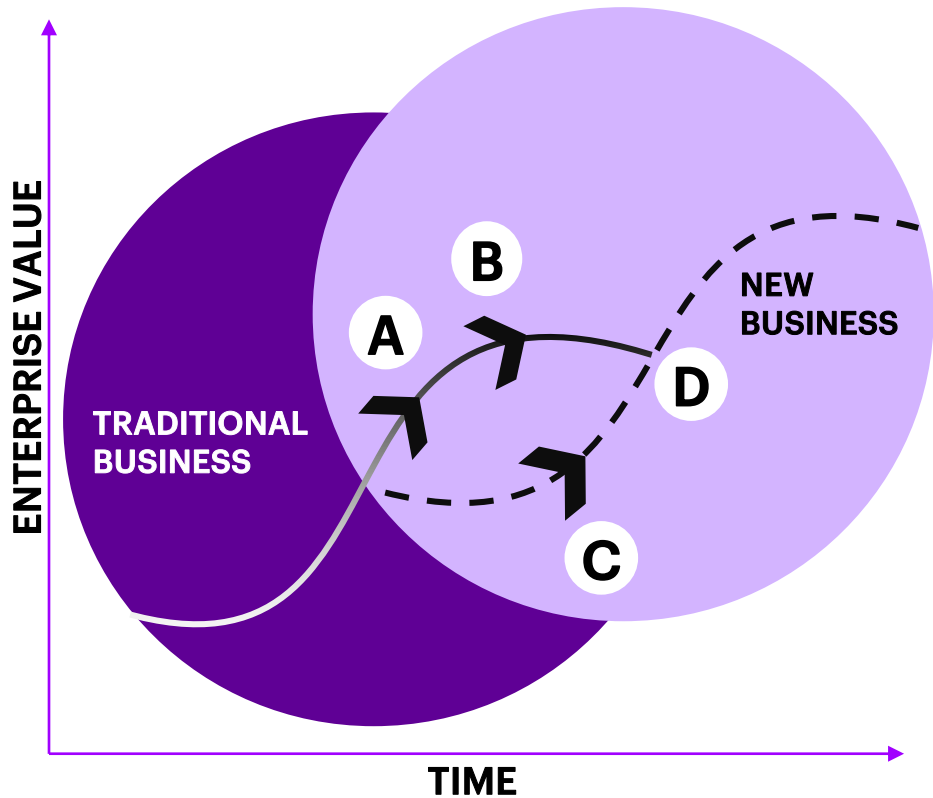
Source: <https://www.elli.eco/en/about-us>





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**“WE WANT TO CHANGE THE WAY
PEOPLE USE ELECTRICITY BY
OFFERING DATA-DRIVEN ENERGY
SOLUTIONS”**



THOUGHT MUST BE GIVEN TO **PIVOTING WISELY** TO ACHIEVE GREATER PERFORMANCE AND CREATE NEW VALUE



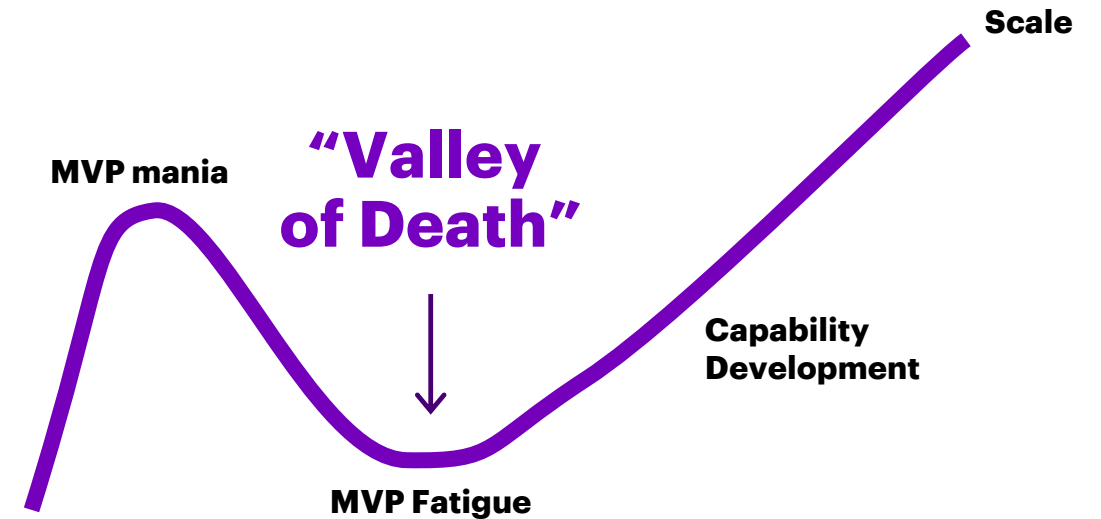
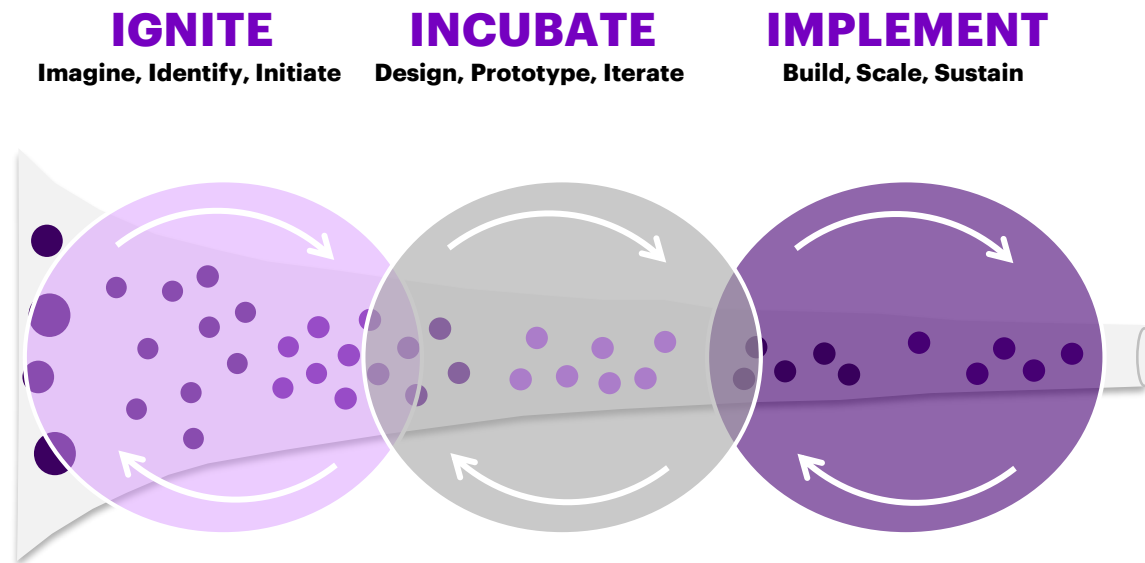
- A**  **TRANSFORM THE CORE** Drive optimization to fuel growth Cutting-edge solutions based on digital to transform core processes and unlock trapped value reducing costs – Digital retail including customer service
- B**  **GROW THE CORE** Release trapped value to sustain growth Increase revenue around the commodity: a) expand to new markets, and b) boost current market share by cross-selling new services – DER, Energy Efficiency / Management
- C**  **SCALE THE NEW** New downstream opportunities around new customers & flexibility trends – Flexibility, P2P Platforms, eMobility
- D**  **WISE PIVOT** To get the timing, scale, performance management and direction of investments right

THE CATCH – GETTING TO SCALE

SURVIVING POC/MVP FATIGUE

Today's market requires a dynamic and disruptive approach to innovation

Maintaining requires investment, commitment, and acceptance of failure



THANK YOU

