

Energy efficiency and smart meters

Addressing a growing market

A fast growing market



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MAKING A WORLD OF DIFFERENCE

CONSUMERS

- ENERGY COSTS
- GREEN DESIRES
- MORE COMPLEXITY

- SMART METERS
- FEED IN TARIFFS
- ROCS

ENERGY PRODUCTS

- RANGE OF
- PRODUCTS/SERVICES
- MORE CONSUMER POWER
 - FRAGMENTED MARKET

Towards 2020...

- COMMODITY POSITION
- LOW CUSTOMER LOYALTY

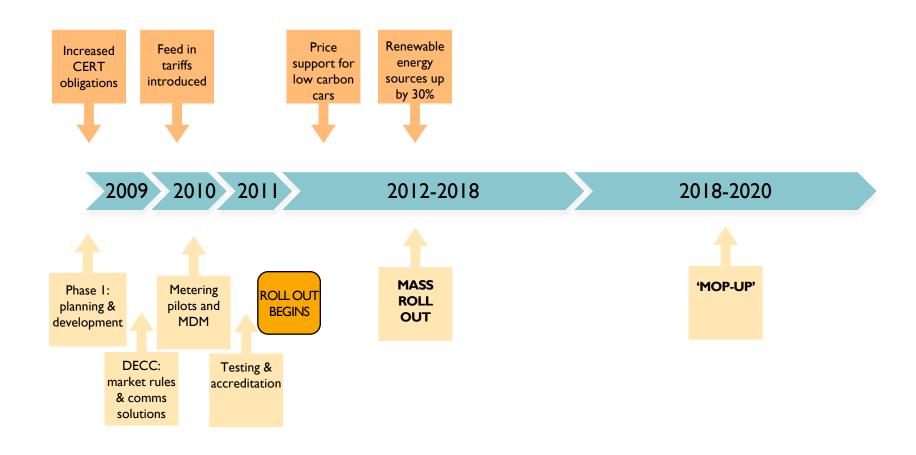
An emerging market



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A growing opportunity



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MAKING A WORLD OF DIFFERENCE

- Global smart meter market valued at \$33 billion (SOURCE: NextGen Research, 2008)
- Related home energy products?
 - Microgeneration: 9 million homes by 2020 (SOURCE: DTI)
 - Energy storage (inc EVs): 1.7 million EVs by 2020 (SOURCE: DECC)
 - Smart appliances: ?
- How can we take advantage of this?
 - Geographical cluster of companies
 - What are our strengths?
 - How do we organise ourselves?
 - What are the ground rules for co-operation?