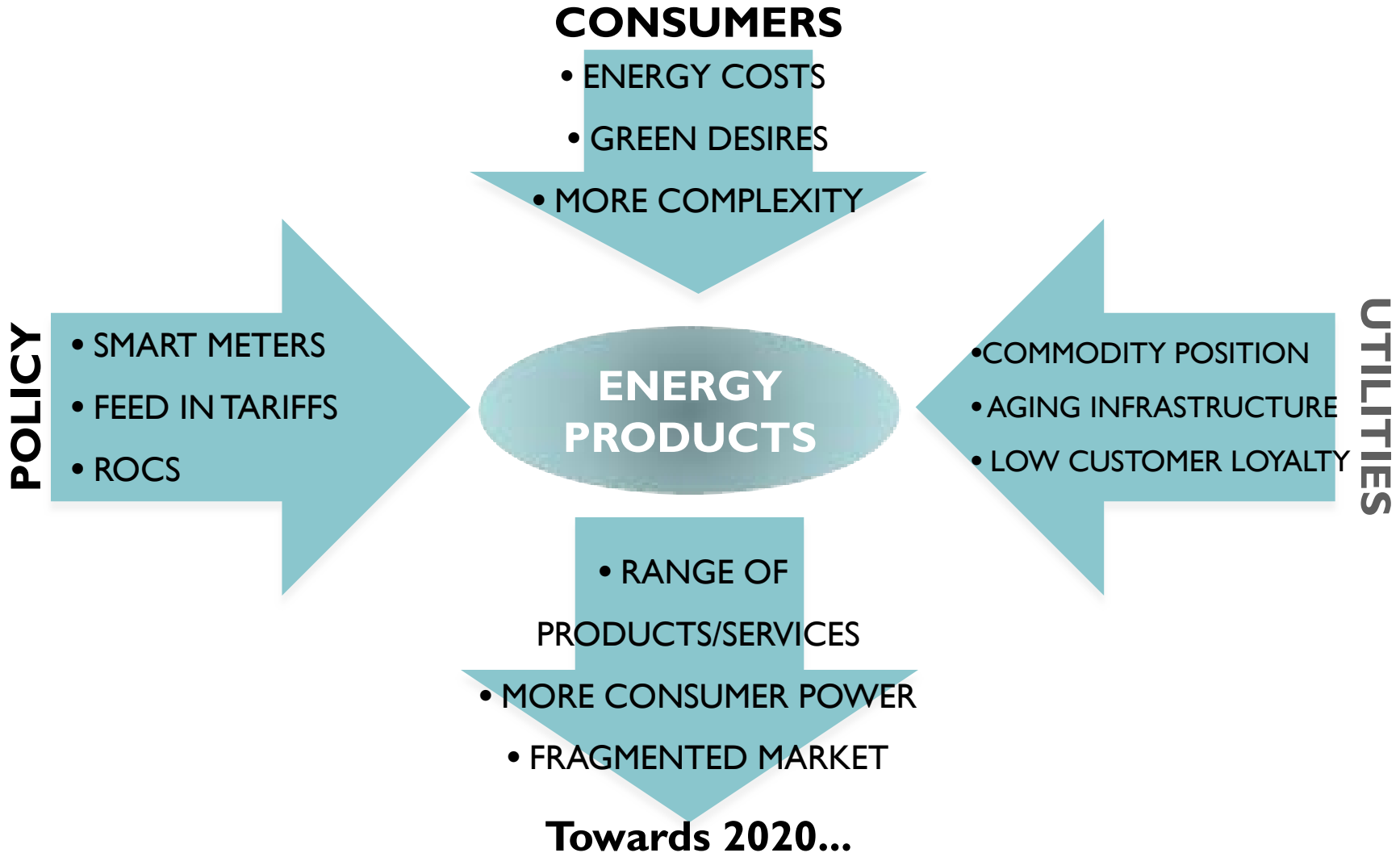


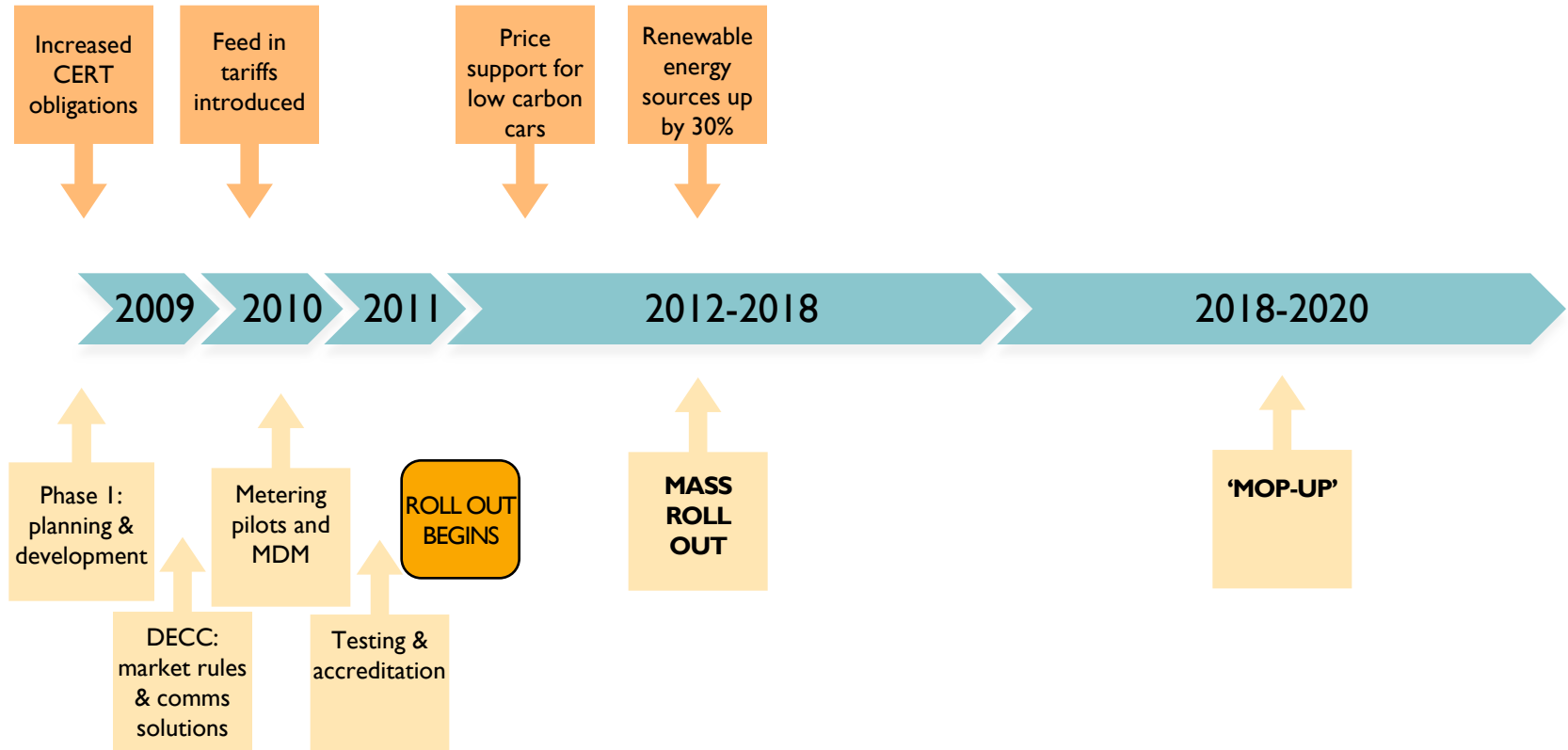
Energy efficiency and smart meters

Addressing a growing market

A fast growing market



An emerging market



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?