



**EURELECTRIC
DIGITOPIA
NOVEMBER 26TH**

accenture

**Delivering new energy
experiences for future growth**

NEW ENERGY CONSUMER

POWERFUL FORCES ARE SHAPING THE NEW DOWNSTREAM ENERGY ECOSYSTEM

We have reached an inflection point—pandemic or not—in the transition to a decarbonized future

Energy demand growth is weak

as electrification of transport and heating are offset by energy-efficiency measures and DERs

Renewables are being deployed at a rapid pace

and increasingly competing with and beating traditional generation sources on price

Business continue to make climate commitments

alongside increasingly ambitious government-led sustainability targets and regulation



Digital technologies expose new value potential

with digital customer journeys, online sales and services, personalization and AI-driven customer operations

Value creation is in Green and beyond commodity

as the financial industry looks to innovative, green-focused utilities as the energy businesses of the future

Competition is heating up with new entrants

such as auto manufacturers, tech companies, oil and gas majors, and startups looking to capture downstream energy value

NEW SOURCES OF CUSTOMER VALUE ARE EMERGING

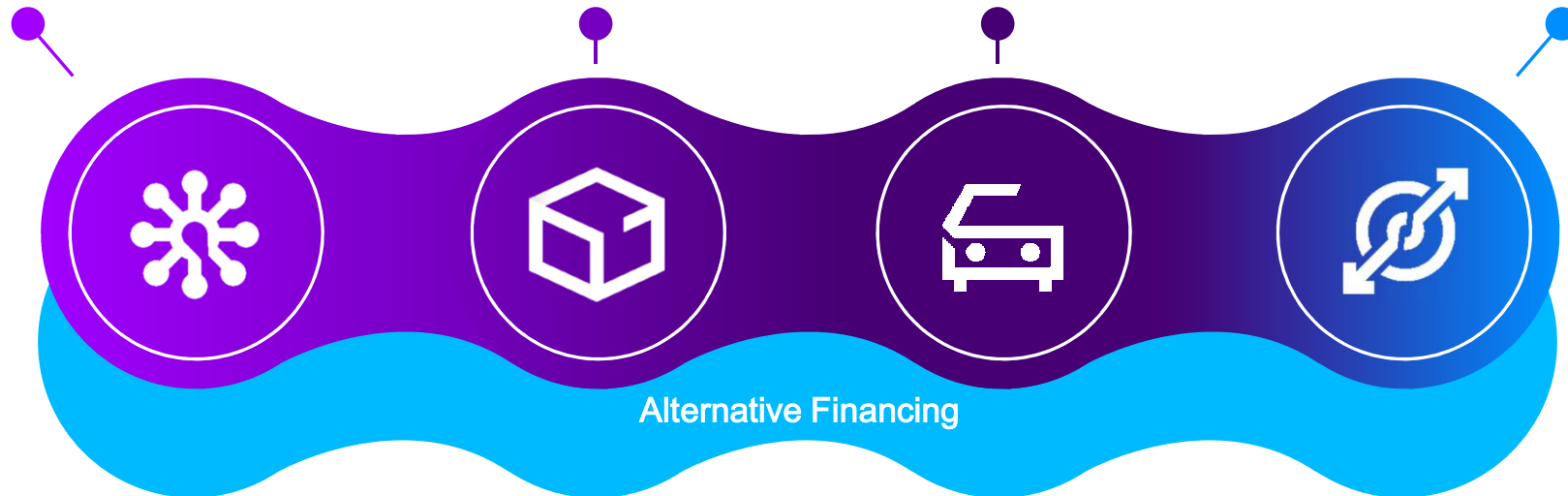
These sources of value are rapidly maturing and gaining traction, with opportunity across segments

Energy Efficiency
and Energy Management

Consumer Generation
and Storage

eMobility

Demand-side
Flexibility

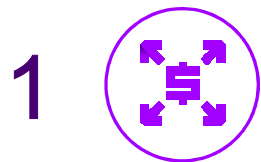


Alternative Financing

Lease/rent models for assets with high upfront costs, "green finance" opportunities for zero-carbon infrastructure

FOUR STRATEGIC PLAYS FOR ENERGY COMPANIES

The right approach will differ based on individual utility context



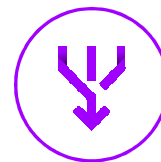
1 Energy Value Provider

Commodity focus, with value-added perks to improve retention



2 Energy & Home Services Provider

Adding “status quo” services in tandem with commodity



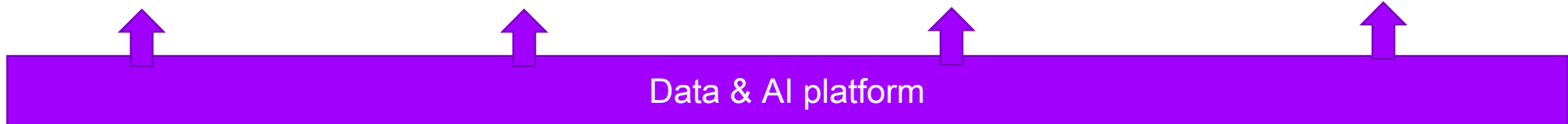
3 Connected Energy Services Provider

Offering future-forward energy products and services



4 Beyond Energy

Pivoting to address emerging needs in the new power ecosystem



CUSTOMERS ARE READY TO ENGAGE – IF ADOPTION BARRIERS ARE ADDRESSED

Success hinges on four experience drivers

BARRIERS TO ADOPTION

01

TOO MANY CHOICES

Customers feel overwhelmed by the wide range of options for home insulation, renewable energy systems or an electric vehicle and want simple, personalized solutions.

02

NOT ENOUGH INFORMATION

Customers want better insight into the real costs and benefits of low-carbon solutions by trusted authorities.

03

LACK OF FINANCING OPTIONS

Customers need affordable, low-carbon solutions—whether EVs, solar PVs, batteries or heat pumps—which requires better financing solutions.

04

UNCERTAINTY ABOUT DATA USE & PRIVACY

Customers are concerned about safety and privacy so it is critical to balance these priorities with the benefits of access to data for personalization and efficiency.

EXPERIENCE DRIVERS

SIMPLICITY

TRANSPARENCY

AFFORDABILITY

TRUST

THE INDUSTRY NEEDS TO DESERVE THE “RIGHT TO PLAY” AND OWN THE “RIGHT TO WIN”



&



- *Credible “purpose driven” brand*
- *Trustful experience*

- *Meaningful value propositions*
- *Say what you do and do what you say*
- *Deliver the promise*
- *Safe data, privacy*