

How will customers experience the energy transition?

15th July 2021

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empowering energy leaders globally

Our mission is to provide **innovative technology** that empowers energy leaders to deliver on the **future promise of energy**



ice Accurate









Engaging





By empowering those who deliver the energy transition

We make a shared contribution to our future





ESG is a leading global energy technology company



Energy Customers



Engagement Channels & Service Contact

Energy Retailer





Data unification > insight creation > Performance Optimisation

Pricing & Quoting

Billing & Payments

Meter Operations Smart Market
Metering Management

Energy Market Systems



200 Global Customers in North America, Japan & UK >21M energy end-customers operational in SaaS globally 500 expert employees across 5 global offices 5 companies acquired & integrated into global ESG **~2M UK customer switches**processed
annually

~40% of UK smart meters to operate via ESG SaaS

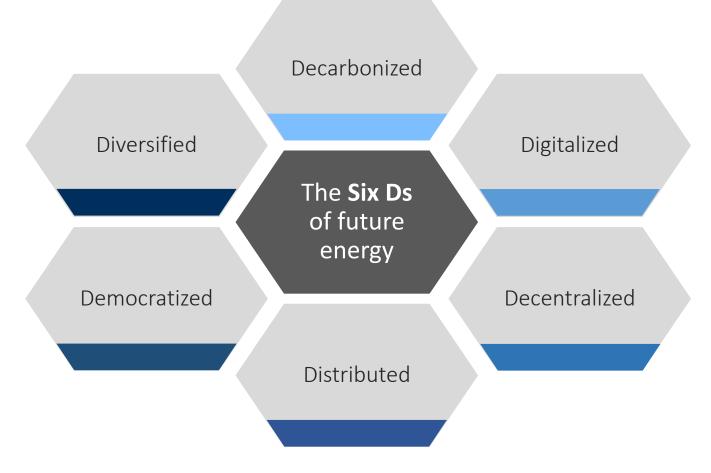
As we empower energy leaders, we manage billions of transactions to generate competitive insight





The **Six Drivers** shaping future energy retail







Empowering a journey towards future energy



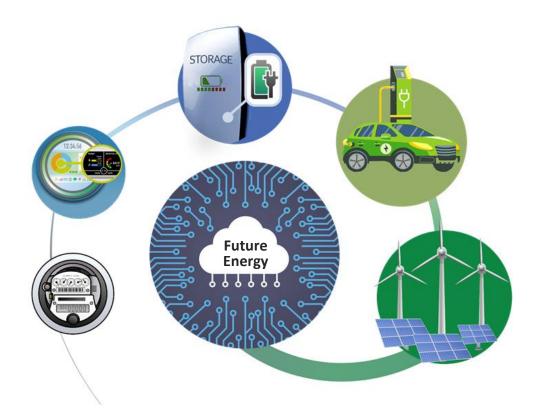




https://esgglobal.com

In the emergence of **new business models**





Customers expect pure 'retail like' customer service across channels

Combined **distributed energy** assets start to disrupt the competitive model

Customer flexibility changes energy network resilience & market balancing

Retained Customers, service providers & communities deliver shared benefits



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Energy Retailers are navigating towards future energy

APIs



Energy Customers In-Premise

- Smart Meters
- Thermostats & sensors
- Rooftop & Community Solar
- EV charging
- Battery Storage
- Heat & cooling pumps

Customer Engagement Channels

Customer

Benefit

Sharing

Original Energy Business Retail

Customer competition, operational service, & position optimization

Future Energy Retail Model

Path to new distributed, flexible, clean energy service models

Energy Markets & Balancing

Market Transactions

Energy Flexibility

Services

EV charging stations

Smart Energy Networks

- Distributed gas generation
- C&I Battery & hydrogen storage
- Distributed Solar & Wind farms

Customer benefit & agility

Energy Retail Business Empowerment

Compliance & Position Optimisation



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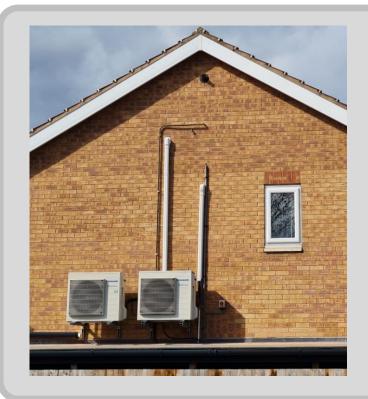
So.... my British Gas installed 'latest combi boiler' from 2007 was nearing its end...





My own case study – heat pump





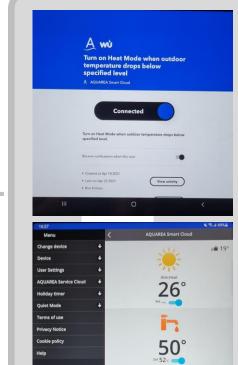




My own case study – **heat pump**



- Certified Installer & ongoing maintenance
- Energy efficiency survey
- Incentives Green Home
 Discount withdrawn,
 Renewable Heat Incentive
- o Any gas cookers?
- Recommended technology
- Placement in the property
- Energy Supplier gas meter removal, single fuel tariff, billing catch-up







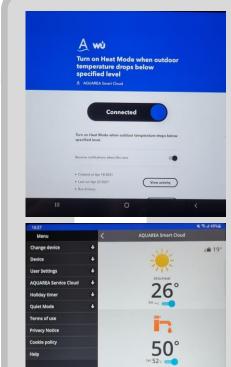


My own case study – **heating**





- Most radiators had to be replaced as anticipated
- Work took a full week across multiple skills
- Heat pump units would not fit through attic hatch – slim unit required
- External unit placement







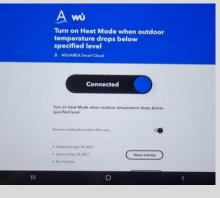


My own case study – **User Control**















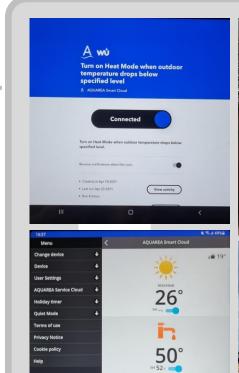
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My own case study – Smart meter





- SMETS2 meter installed
- IHD disconnects continually
- Billing not correct yet
- Prompts to Supplier on tariff









My own case study – energy infrastructure







Local council installed an OLEV funded EV charger in 2014 without asking ...with a dumb meter

Circuit board needs replacing before adding planned new energy technologies such as solar & Storage



My own case study – The Outcome



No gas use at all and growing cost saving

Supplier revenue reduced by ~40%

Highly efficient latest product performance

No Supplier led Heat Pump product

Integration ready for energy technologies

Will follow manufacturer path

Optimise & service via programmable apps

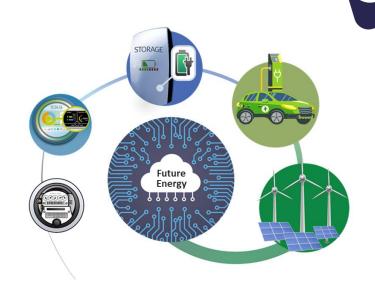
Who will I use for flexibility?

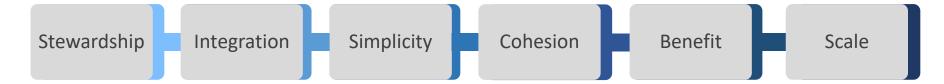


UK Smart Metering – **Underpinning fundamentals**



https://www.smartenergygb.org/en/smart-living/how-will-life-be-different-in-2035







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- Energy customers want to save money in the most direct way
- o The energy transition introduces **new costs**
- Customers seek simplicity and leadership
- Trials are helpful but they do not reflect mass markets



What signals will **customers respond** to?





- Energy customers want to save money in the most direct way
- The energy transition introduces new costs
- Customers seek simplicity and leadership
- o Trials are helpful but they do not reflect mass markets

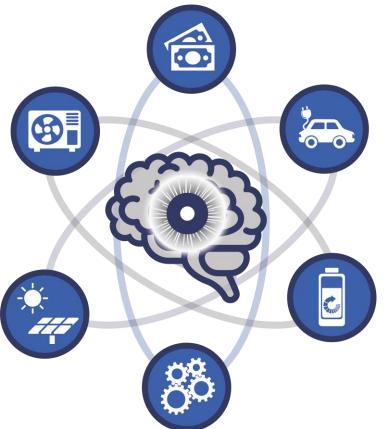


- Energy customers respond to upfront retail pricing not outturn cost
- Smart tariffs are helpful only once combined with easy user control
- Cost impacts & technology benefits need to be specific & practical
- Build on smart meters for overall position not just switching promise



Smart energy pricing is the **NUCLEUS** of a customer energy transition





- o Basic guidance for customers on what to do
- o Simplified multi-device & directional energy pricing
- o Commodity combined with finance & services
- o Verification of the cost saving promises made
- Sharing of automatic flexibility financial reward
- o Solving the **specific delivery** & integration needs
- o From untrusted promise towards optimal cost



The need for energy platform eco-systems



Original Competitive Energy Model

Providing the bridge towards future energy through integration, collaboration & innovation

Future Competitive Energy Model



Towards **Platform Eco-systems** empowering future energy







Technology



Social



Platforms





Let's create future energy together

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