



Empowering Energy Leaders Globally

How will customers experience the energy transition?

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CMO





empowering energy leaders globally

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



Choice



Accurate



Secure



Clean



Connected



Engaging



Distributed

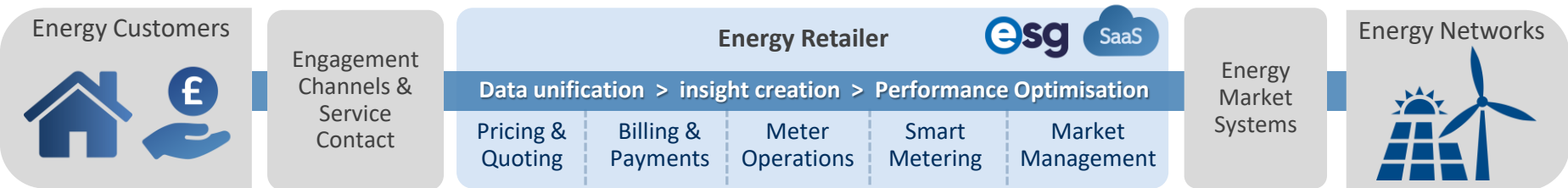


Rewarding

By empowering those who deliver the energy transition
We make a shared contribution to our future



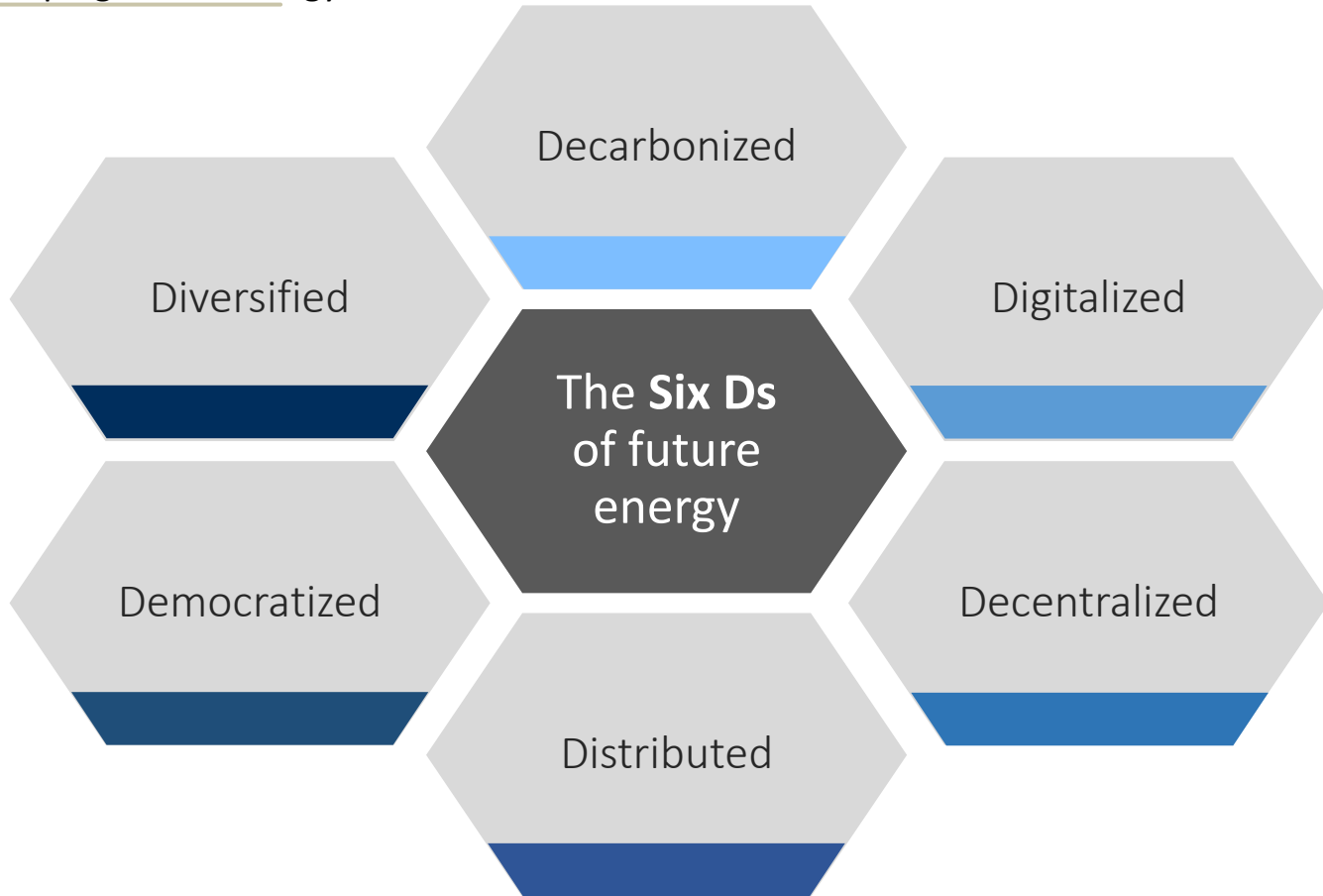
ESG is a leading global energy technology company

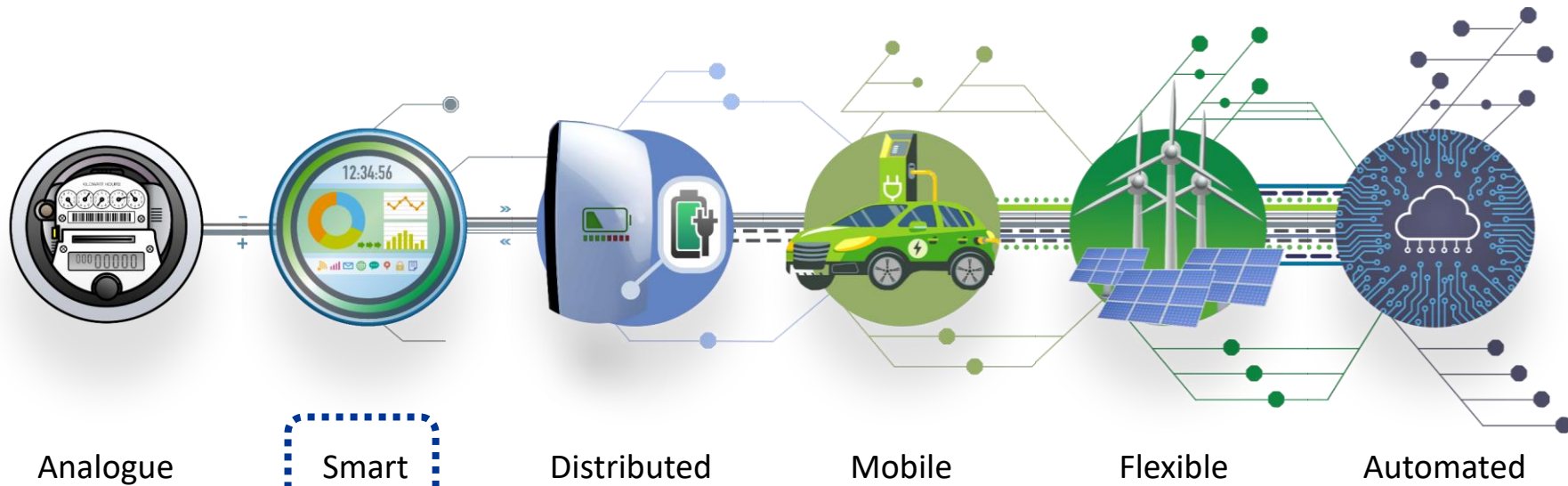


- 200 Global Customers in North America, Japan & UK
- >21M energy end-customers operational in SaaS globally
- 500 expert employees across 5 global offices
- 5 companies acquired & integrated into global ESG
- ~2M UK customer switches processed annually
- ~40% of UK smart meters to operate via ESG SaaS

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

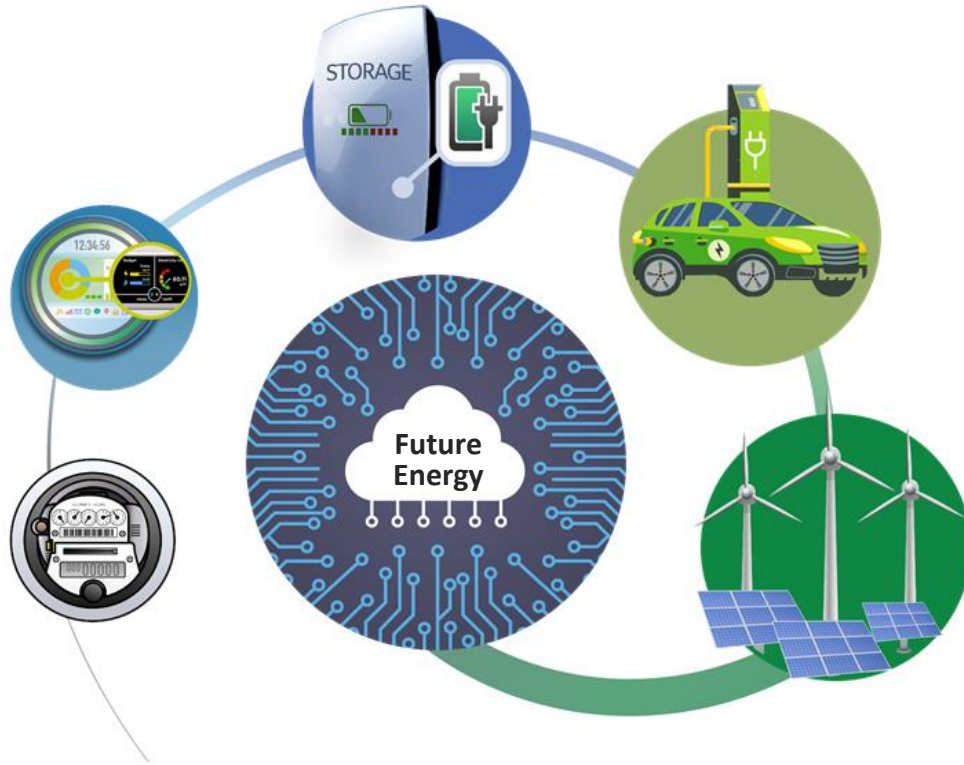






Energy is transitioning through the smart stage unlocking new Retailer demands, risks & revenue streams

In the emergence of **new business models**



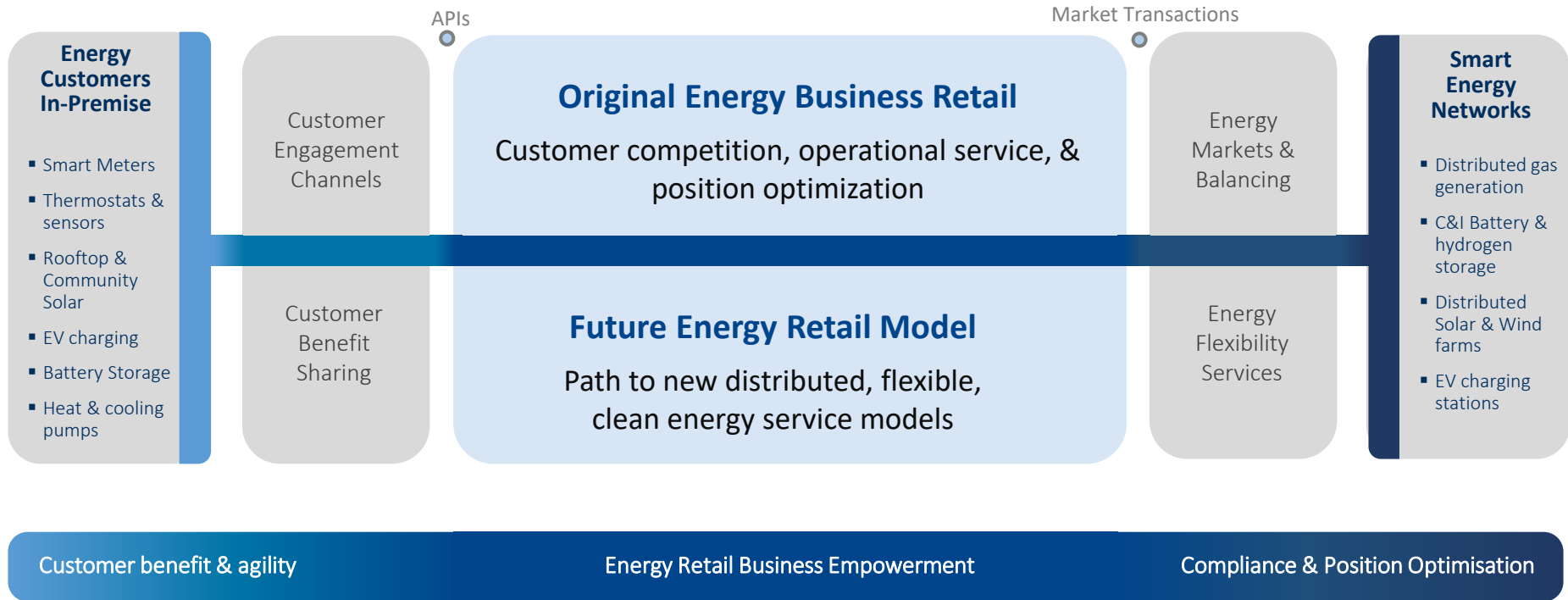
Customers expect pure **'retail like'** customer service across channels

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

Customer flexibility changes energy network resilience & market balancing

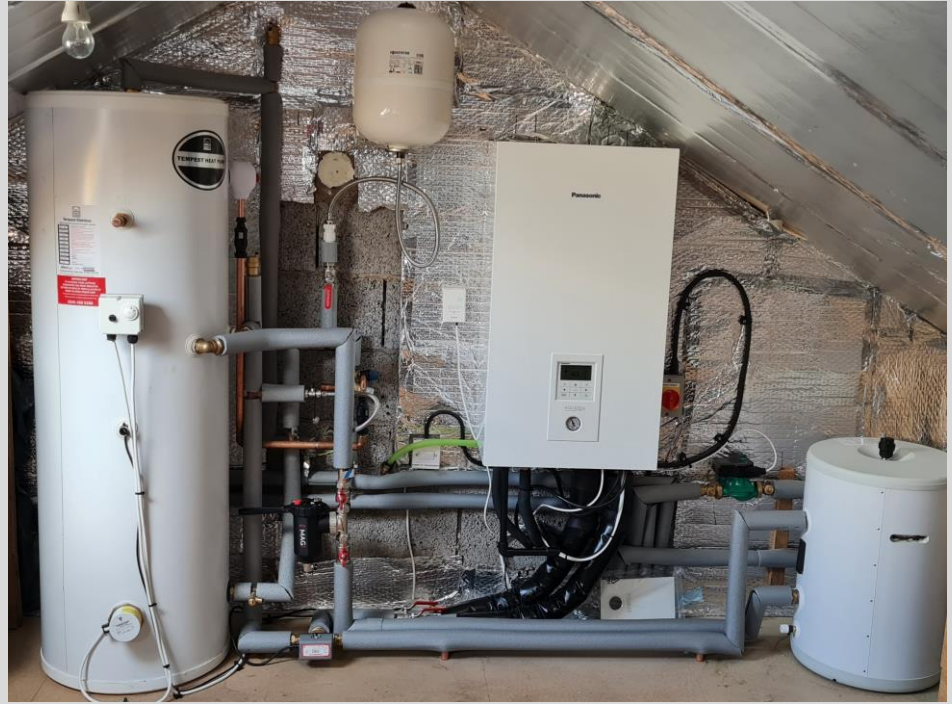
Retained Customers, service providers & communities deliver **shared benefits**



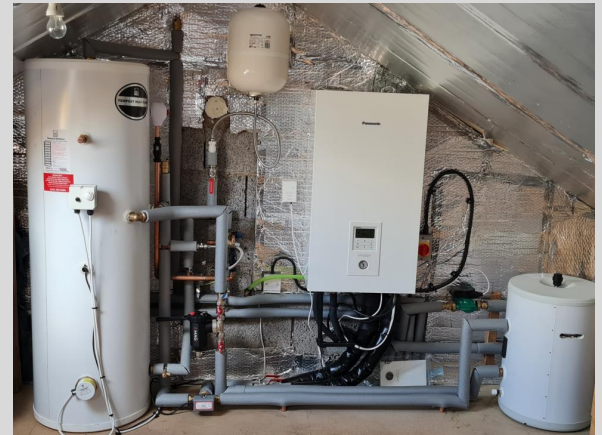
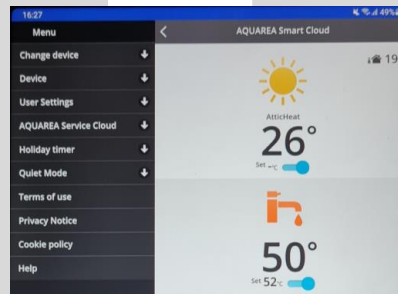
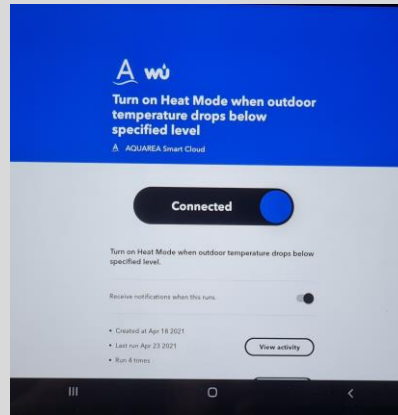


So.... my British Gas installed
'latest combi boiler' from 2007
was nearing its end...



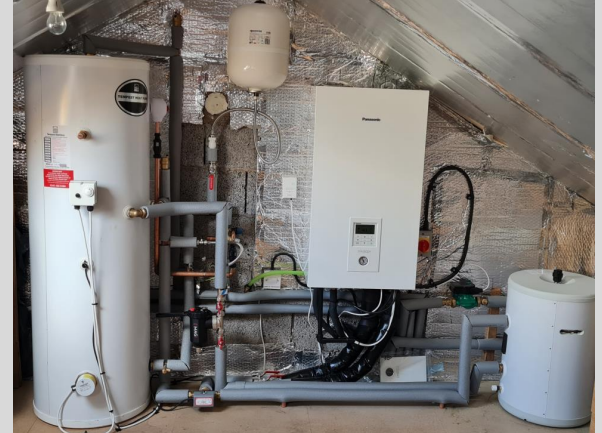
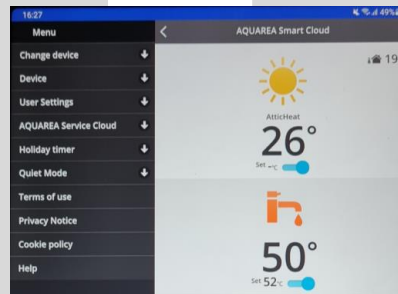
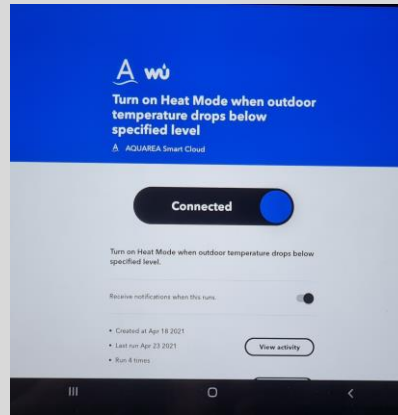


- **Certified Installer** & ongoing maintenance
- **Energy efficiency** survey
- Incentives – Green Home Discount withdrawn, **Renewable Heat Incentive**
- Any **gas cookers**?
- Recommended technology
- **Placement** in the property
- **Energy Supplier** – gas meter removal, single fuel tariff, billing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

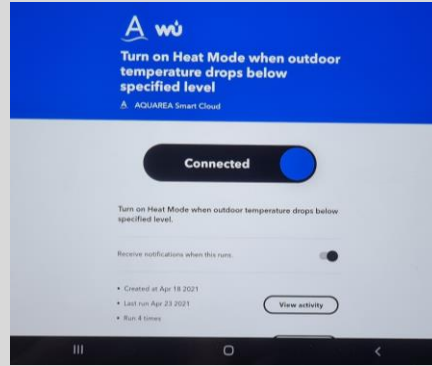
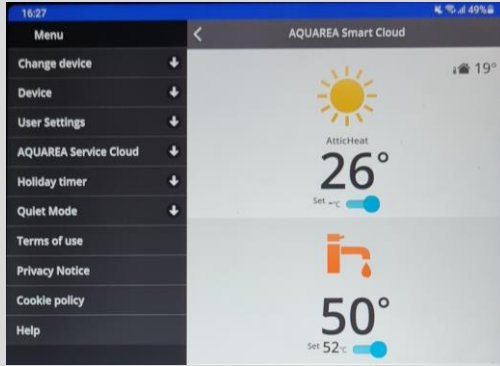


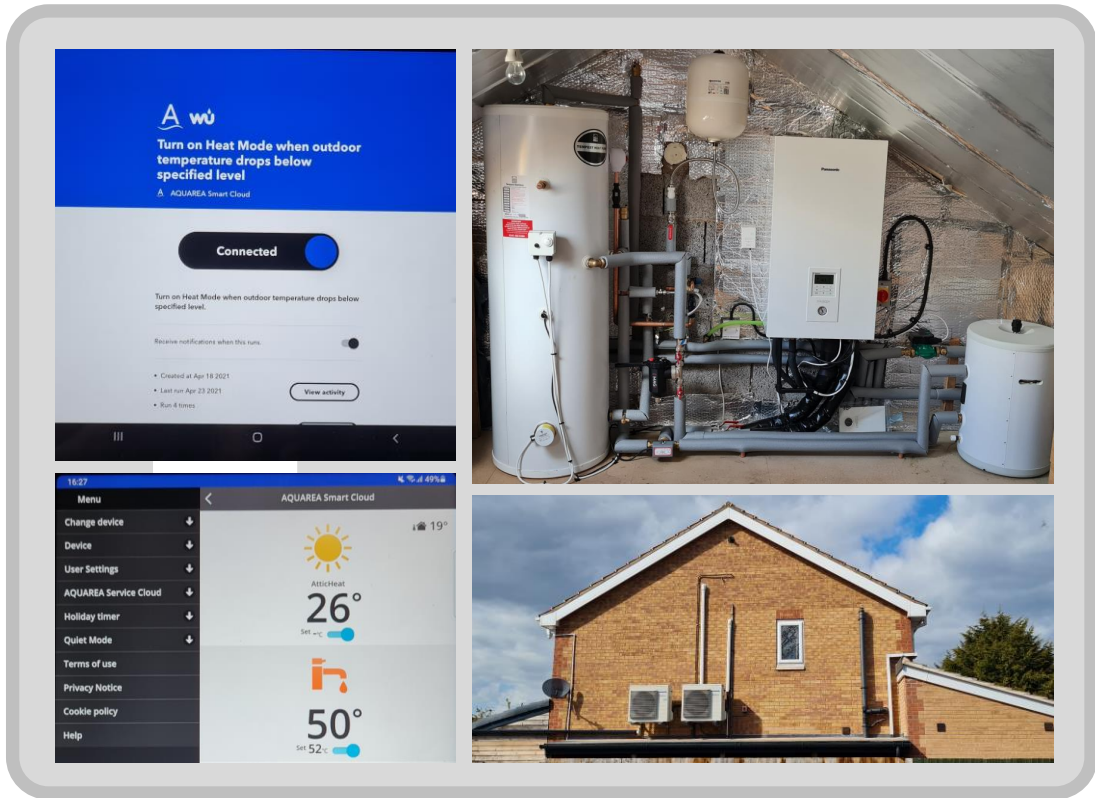


- Most **radiators** had to be replaced as anticipated
- Work took a **full week** across multiple skills
- Heat pump units would not fit through **attic hatch** – slim unit required
- **External** unit placement



My own case study – User Control





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



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



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

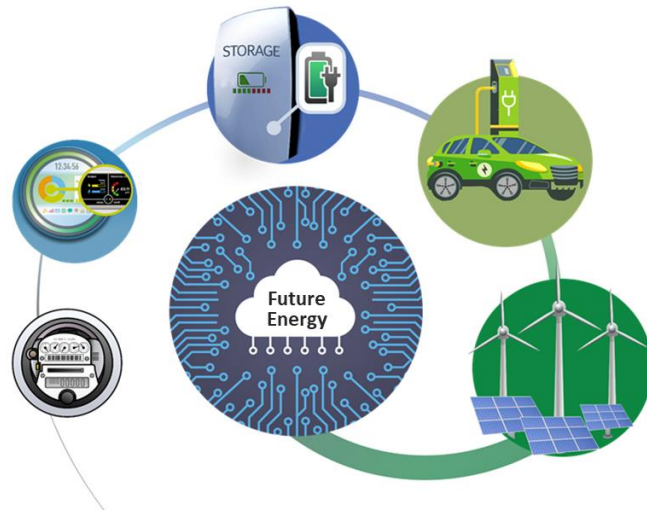
Optimise & service via programmable apps

Who will I use for flexibility?





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



Stewardship

Integration

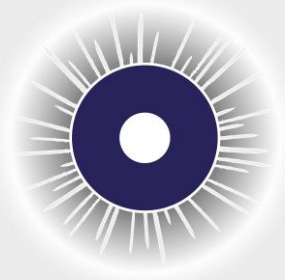
Simplicity

Cohesion

Benefit

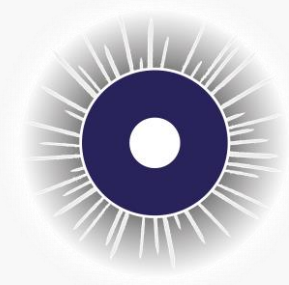
Scale





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



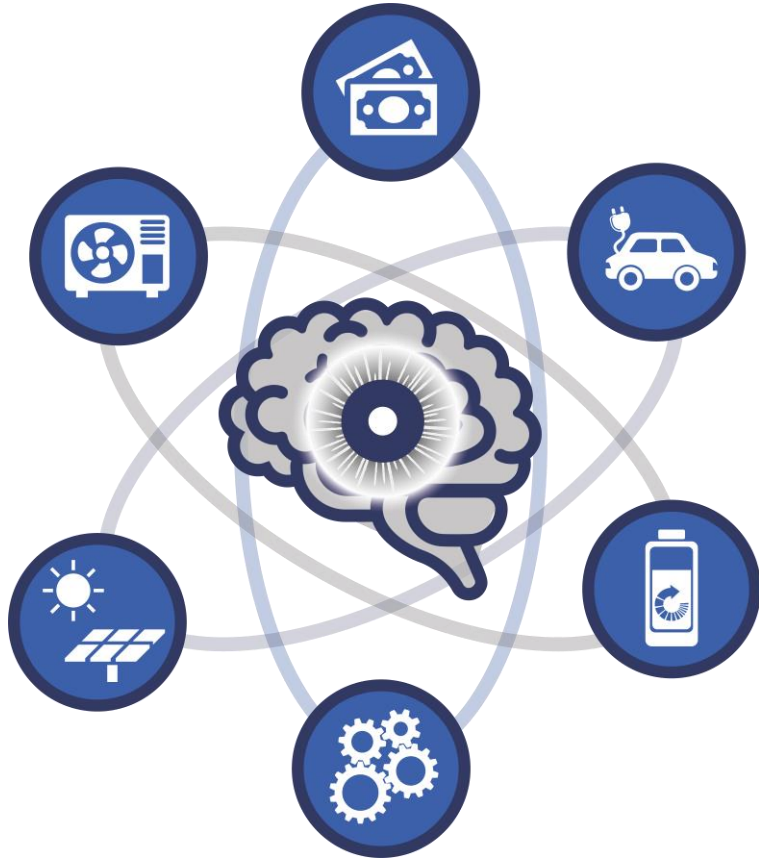


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- Energy customers respond to upfront **retail pricing** not outturn cost
- Smart tariffs are helpful only once combined with **easy user control**
- Cost impacts & technology benefits need to be **specific & practical**
- Build on smart meters for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





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

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



Sustainability



Technology



Social



Platforms





Empowering Energy Leaders Globally

Let's create future energy together

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