Mastering the "energy transition" ecosystem

The ecosystem as an approach to support customers in their personal energy transition.
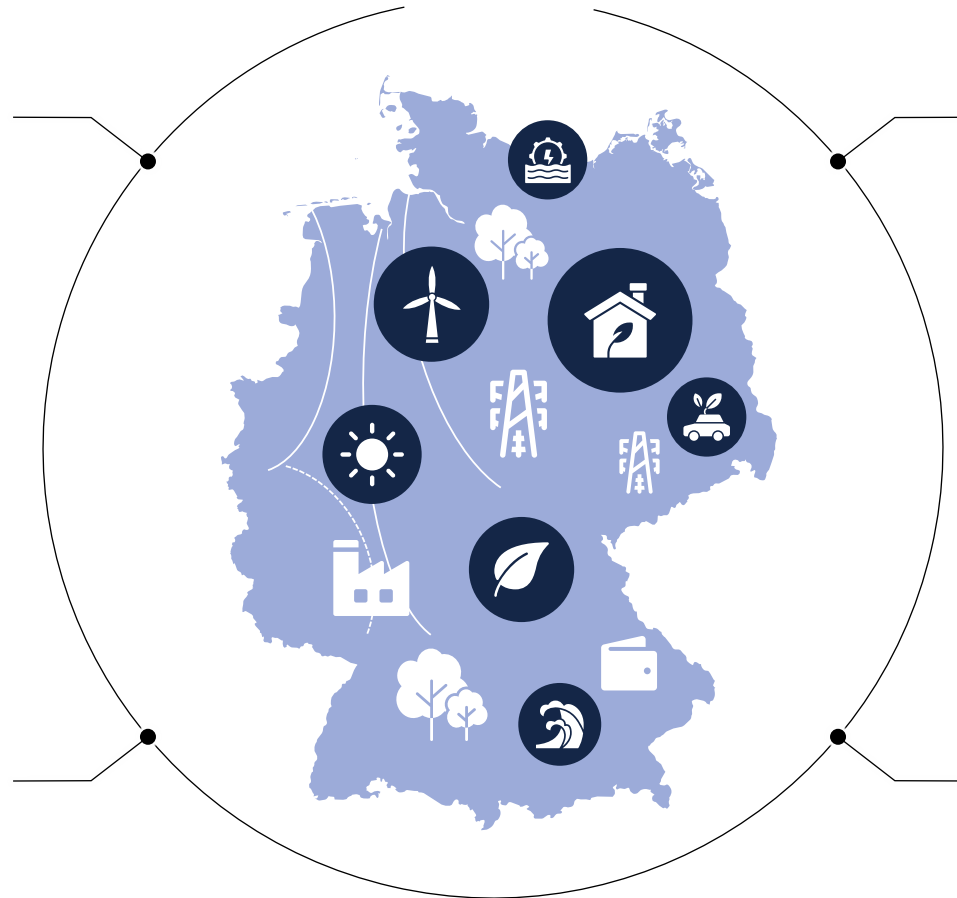
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Europe is ready for the energy transition: Change from all directions is driving change faster than ever – and presenting us with challenges

Customer

Generations X, Y & Z will make up **100% of the relevant customers in** the next few years - with their own requirements and user behavior.

Convenient, sustainable, social, 24/7.

Competition

Sector coupling accelerates the networking of industries with one goal in mind. **Energy suppliers, oil companies, OEMs and tech companies are becoming competitors - or partners.**

Infrastructure

From gas to heat. From fuel to electricity. **Sustainable infrastructure conversion and expansion** influences the availability of products - and **is influenced** by customer demand.
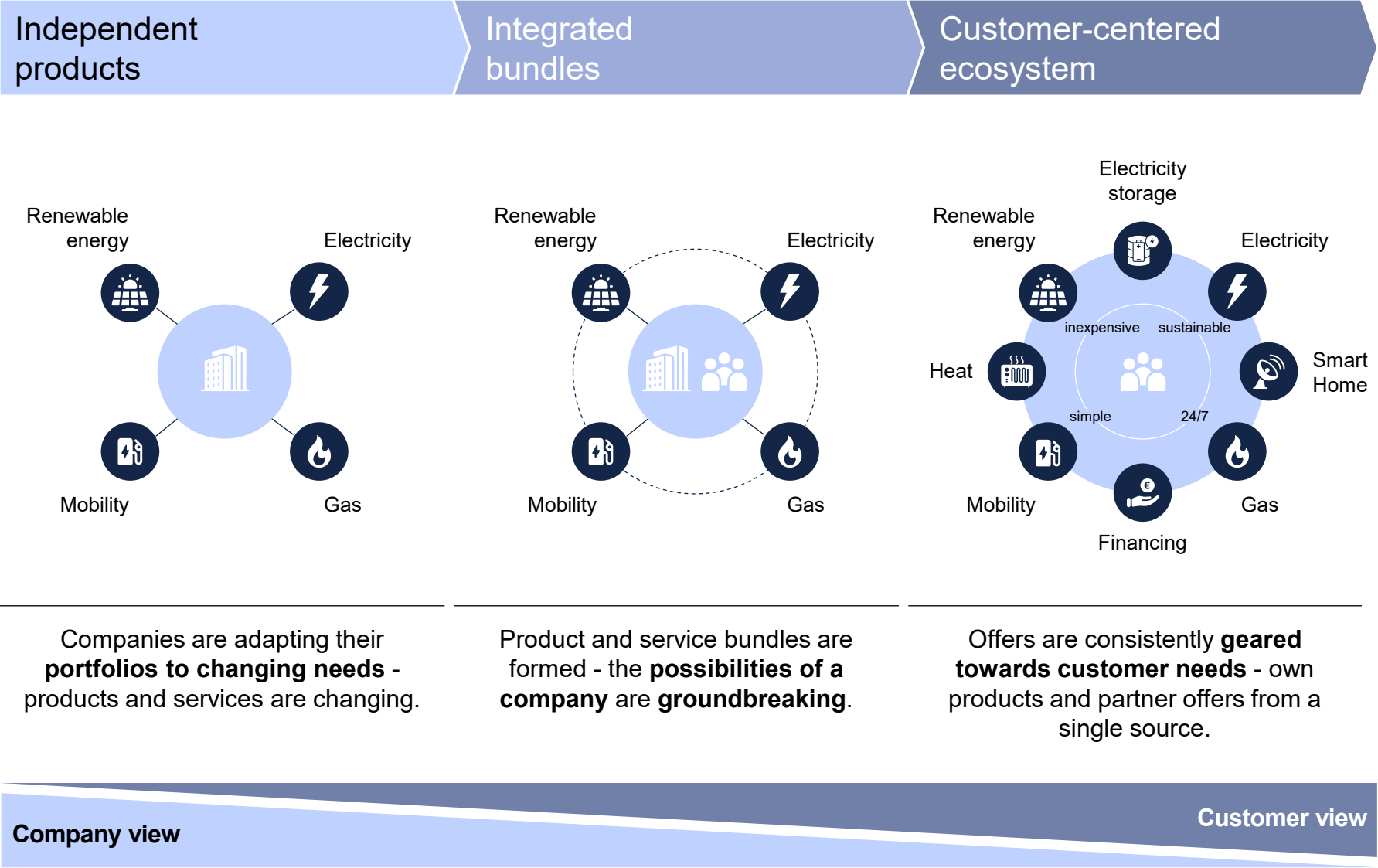
Regulation

Politics is driving the energy transition; the pandemic, war and climate change are adding to the pressure.

Bans, subsidies and regulations are influencing companies and confusing customers.

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Customers need a companion for their energy transition. They expect **solutions from a single source** – from the combination of our own products to the integration of partners.

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Customer-centric transformation

→ Companies consistently focus on customers with the ecosystem approach - own offerings become part of the solution

Independent products	Integrated bundles	Customer-centered ecosystem

Companies are adapting their **portfolios to changing needs** - products and services are changing.

Product and service bundles are formed - the **possibilities of a company** are **groundbreaking**.

Offers are consistently **geared towards customer needs** - own products and partner offers from a single source.
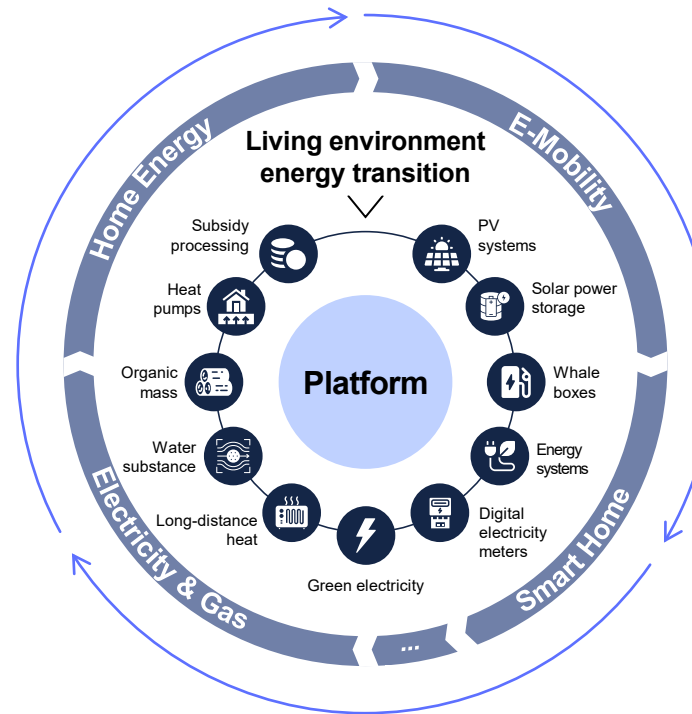
Company view

Customer view

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Ecosystem example

→ The needs of users determine living environments, content and relevant partners - sustainable energy often a "common denominator"

Products & Services

It is important to ensure product availability and align products & services with the **infrastructure and needs** of customers

Living environment energy transition

Platform

- Subsidy processing
- Heat pumps
- Organic mass
- Water substance
- Long-distance heat
- Green electricity
- Digital electricity meters
- Energy systems
- Whale boxes
- Solar power storage
- PV systems

Home Energy · E-Mobility · Smart Home · Electricity & Gas

Fulfillment

Securing craftsman capacities is necessary to handle all products & services end-to-end

Enabling Services

The right technologies & services are required as enablers of the ecosystem

The Ecosystem approach enables us to offer customers scalable products & services from a single source

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Ecosystems as a recipe for success: research and successful companies underline the potential for ecosystems

x 2

50%

74%

76%

Profitability

"Platform companies were twice as profitable [...] and more than twice as valuable as their conventional counterparts."[1]

New products

"New products and services for consumers now account for over 50% of Tencent's total revenue."[2]

Customer relevance

... of Germans already use digital ecosystems regularly or could imagine doing so[3]

Transformation

"76% of CEOs surveyed think that current business models will be unrecognizable in the next 5 years - ecosystems will be the most important factor for change."[4]

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