



The Smart Power Ecosystem – A Discussion on Competitive Positioning

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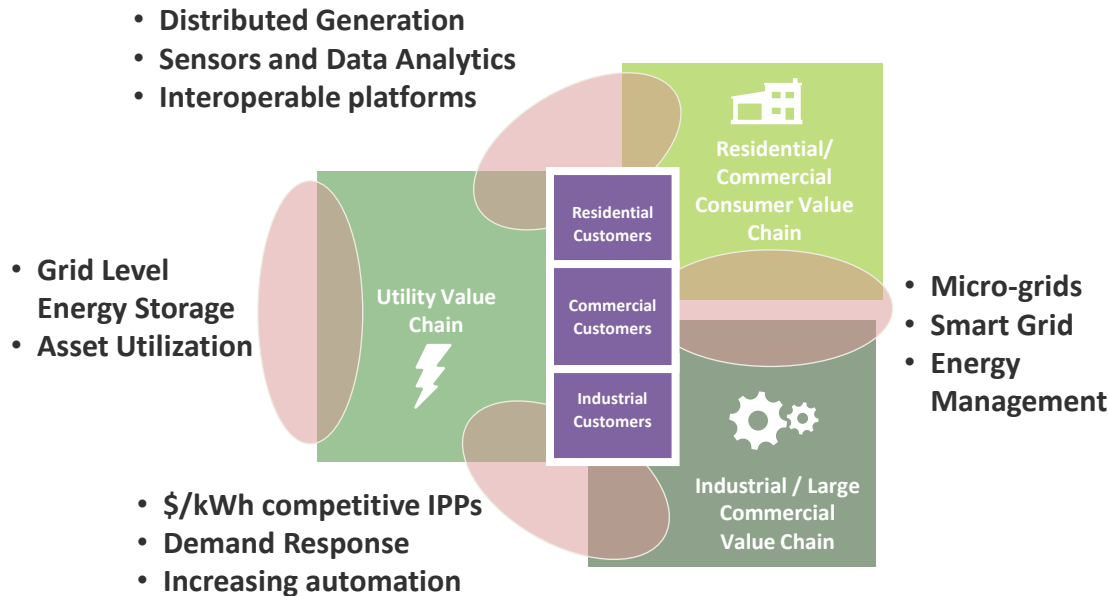
The Smart Power Ecosystem

A Discussion of Competitive Positioning

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Smart Power – Many Things, Many Markets



Smart Power Market

Market size is > \$1T

Multiple interconnected ecosystems

Blurring interfaces between markets

Hybrid markets and solutions

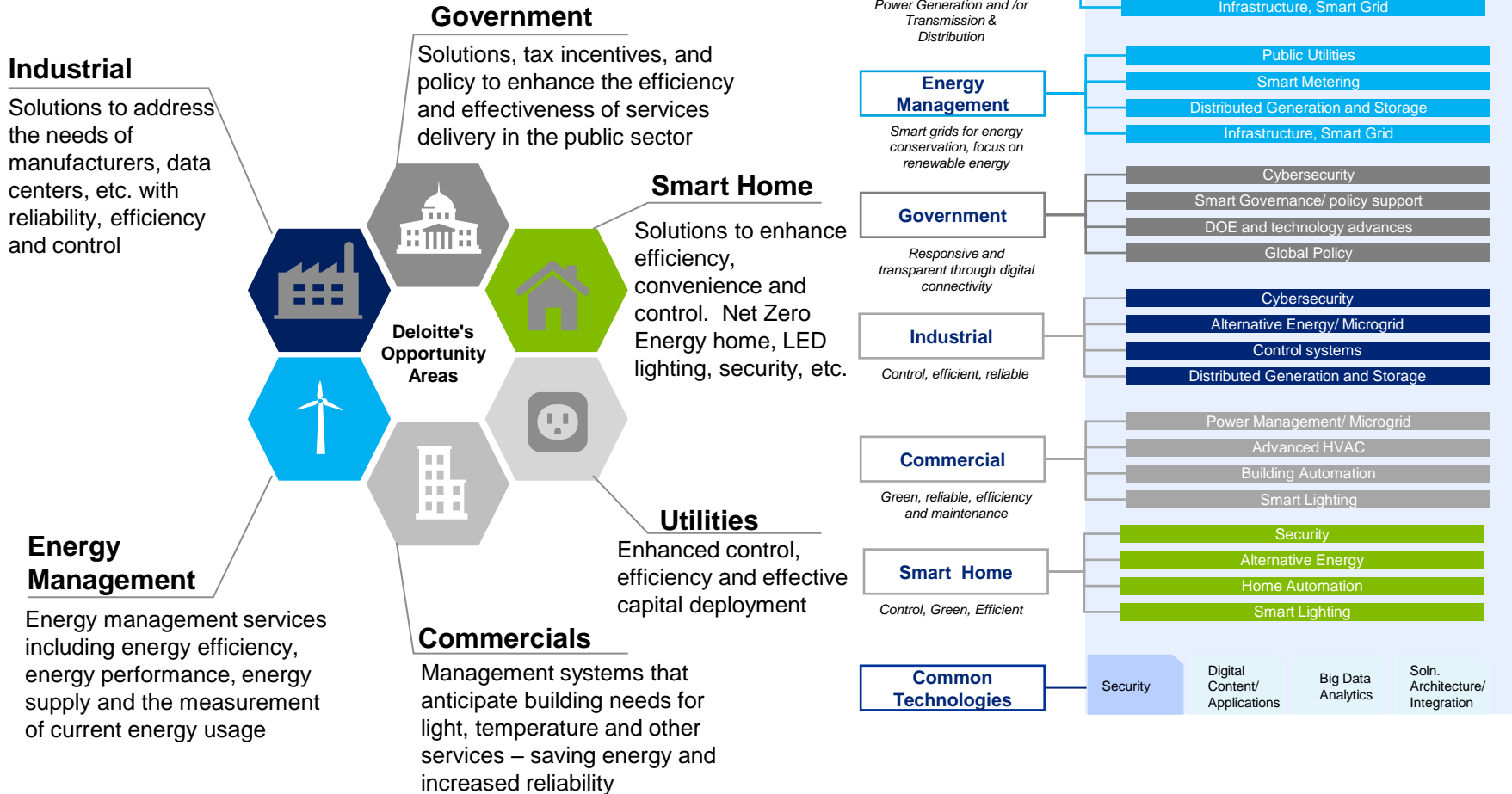
Innovation and scale is accelerating

IoT development is critical – but is it differentiating LT

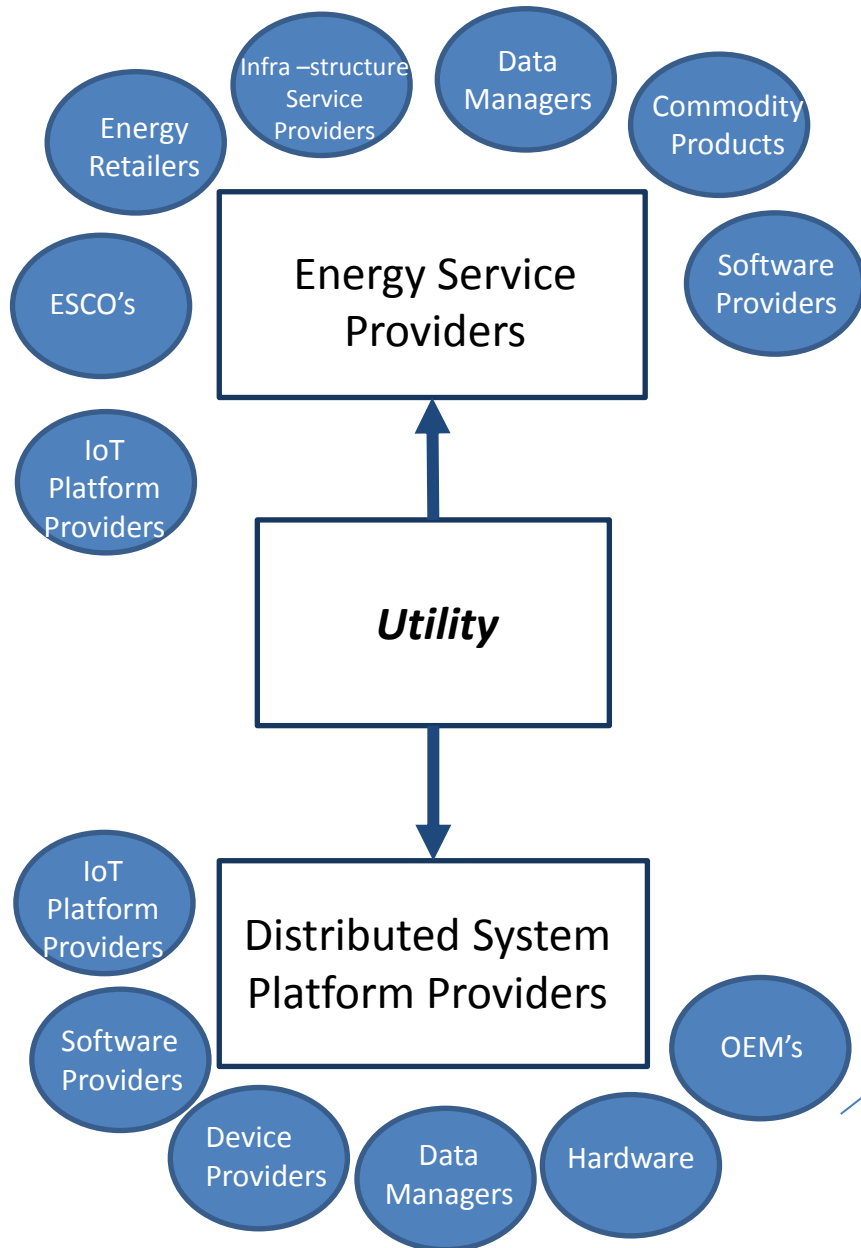
Push/pull between central and edge solutions

Devices, data and connectivity gaps

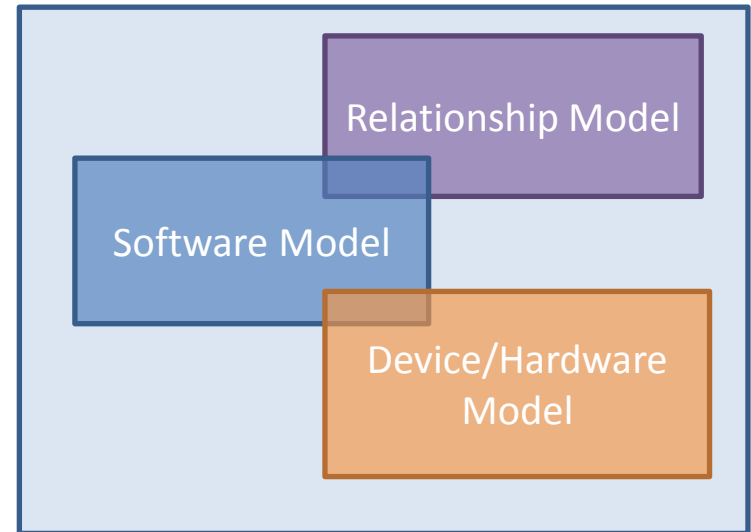
Smart Power – The Market Is Active, If Uncertain



Smart Power – New Competitive Models



Representative Competitive Models



- The market is active but uncertain
- No company has full solution - multiple sectors converging
- New market models - solution vs. relationship models; is software differentiating?
- Utilities in precarious position – competitive vs. regulatory

Smart Power – Questions Across the Ecosystem

Utilities

How do we manage revenue and capital deployments?

Where is the long-term boundary between utility & energy service companies?

Can we compete in the behind the meter markets?

How much capital can we invest in grid infrastructure before incremental value erodes?

Energy Service Providers

Is there long term value in monitoring and control?
Long-term role?

Can current and prospective data be mined effectively?

Which portal/customer interface 'wins'?

As functionality moves to the edge, is there a value added role?

OEMs/Telco

What is future end-state?
Fundamentals – what do customers really want?

Should I pivot from a hardware to solution orientation? Can I?

Who is the long-term buyer?

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