IHS ENERGY

Presentation

Université Paris-Dauphine Seminar

These New Companies: Mapping Moving Landscapes

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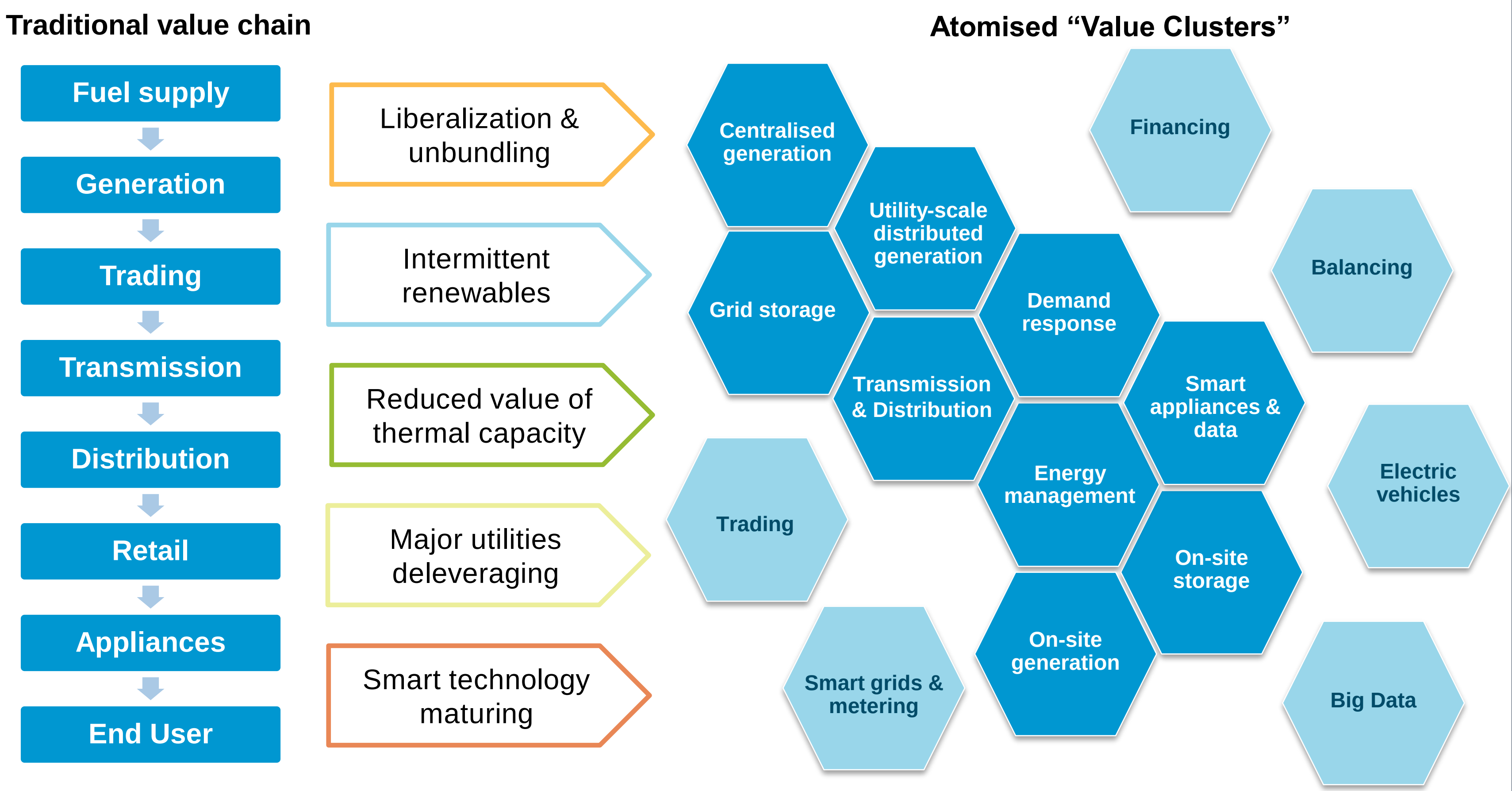
Traditional value chains are breaking down, new opportunities arise

From value chains to clusters



Source: IHS

So what does it mean to be an energy company today?

- Policy and market levers have driven an atomisation of traditional value chains across Europe’s liberalised power markets
  - Incumbent players are restructuring their business models and operations
  - New market entrants are capturing available opportunities in an increasingly decentralized power system
- Most of the new business models are born from, and reacting to, country-specific competitive and regulatory environments
  - Today, there is no one-size-fits-all business model for Europe’s power markets anymore
- Mid-term, a reconsolidation of Europe’s competitive landscape can’t be avoided
  - Exposure of all industry players to policy, market and technology risks bears inherent risks and will require resilient business solutions
  - Restructuring of value portfolios is the logical step to maneuver Europe’s moving competitive landscape, ultimately defining a new generation of energy companies

IHS Study: Mapping Moving Landscapes

New players and business opportunities across the competitive landscape of Europe's power sector

IHS Energy has developed a comprehensive, in-depth study to **support strategic decision-makers** across the energy industry in **navigating Europe's complex and changing competitive landscape.**

Study structure:

Part 1 Overview: Today's power industry and how we got here	**Part 2 Competitive Landscape**: New players and opportunities	**Part 3 Outlook**: Evolution of new business models

Study benefits include:

- Dedicated client **workshop**
- Full study **report** (200+ slides) plus **executive summary**
- **Detailed** country profiles for seven markets, four business model profiles and 21 case studies
- **Margin and profit pool** estimates including forward projections to **2025**, and key assumptions

For details about this study, please contact Cristian Muresan (cristian.muresan@ihs.com)

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