

Université Paris-Dauphine Seminar

These New Companies: Mapping Moving Landscapes

13 March 2015

ihS.com

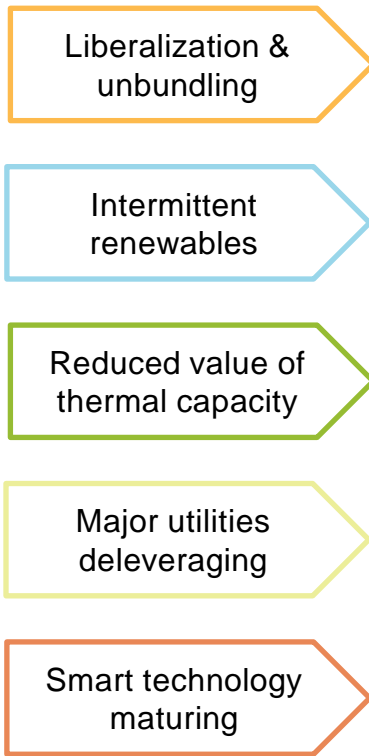
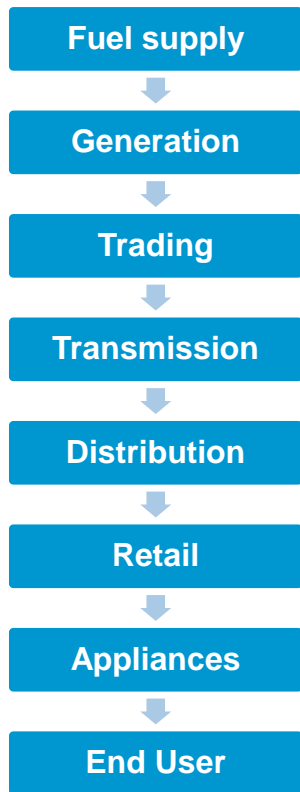
Susanne Hounsell, Associate Director, +33 176 76 30 57, susanne.hounsell@ihS.com



Traditional value chains are breaking down, new opportunities arise

From value chains to clusters

Traditional value chain



Atomised "Value Clusters"



Source: IHS

© 2014 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:



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)

IHS Customer Care:

- **Americas:** +1 800 IHS CARE (+1 800 447 2273); CustomerCare@ihs.com
- **Europe, Middle East, and Africa:** +44 (0) 1344 328 300; Customer.Support@ihs.com
- **Asia and the Pacific Rim:** +604 291 3600; SupportAPAC@ihs.com

© 2014 IHS. No portion of this report may be reproduced, reused, or otherwise distributed in any form without prior written consent, with the exception of any internal client distribution as may be permitted in the license agreement between client and IHS. Content reproduced or redistributed with IHS permission must display IHS legal notices and attributions of authorship. The information contained herein is from sources considered reliable but its accuracy and completeness are not warranted, nor are the opinions and analyses which are based upon it, and to the extent permitted by law, IHS shall not be liable for any errors or omissions or any loss, damage or expense incurred by reliance on information or any statement contained herein. For more information, please contact IHS at Customer Care (see phone numbers and email addresses above). All products, company names or other marks appearing in this publication are the trademarks and property of IHS or their respective owners.

