

Leading the future of **energy intelligence**

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Old world

The Age of **Fire**

Volatility of energy
cost & availability

High emissions & pollution

Resource **depletion**

New world

The Age of **Electric**

Stability of energy
cost & availability

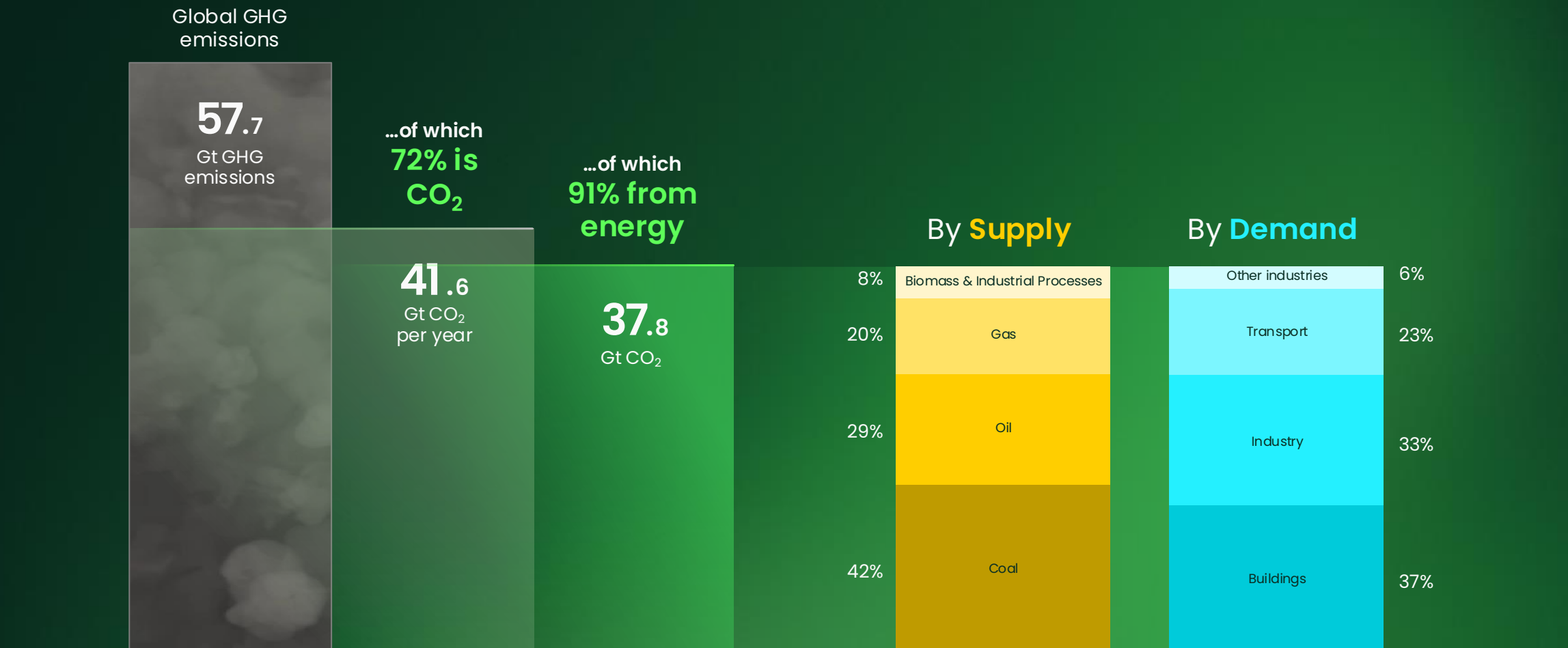
Low emissions & pollution

Resource **conservation**

We are at an
**inflection
point**

How we produce and consume
energy is the key to tackling the
climate and energy crises

The cause of the climate crisis? Global **greenhouse gas** emissions...



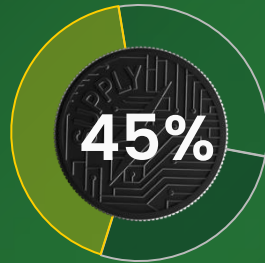
Source: UNEP Emissions Gap Report 2025 / EDGAR for GHG totals. IEA Global Energy Review 2025 for energy CO₂.

There are two sides of the **energy coin**

Supply Side



Replace



- ✓ Offsite renewables purchasing PPAs
- ✓ Onsite generation solar, PV, microgrids and energy storage
- ✓ Grid integration smart grid optimization and resiliency

Demand Side



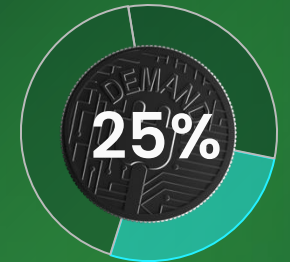
Electrify



- ✓ Building heating electrification
- ✓ Industrial process power
- ✓ Transport & EV transition



Reduce



- ✓ Design & build for low carbon
- ✓ Real-time data & automation
- ✓ Circularity & material reuse

Everywhere in the world, the energy
landscape is already **transforming**

*Sources: IEA , BloombergNEF

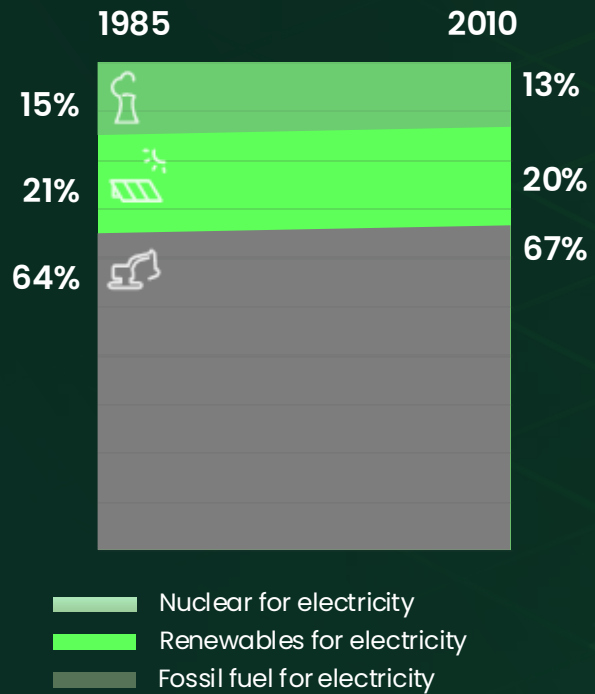
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Past | Reliable power delivery & protection

For decades electricity distribution was largely linear

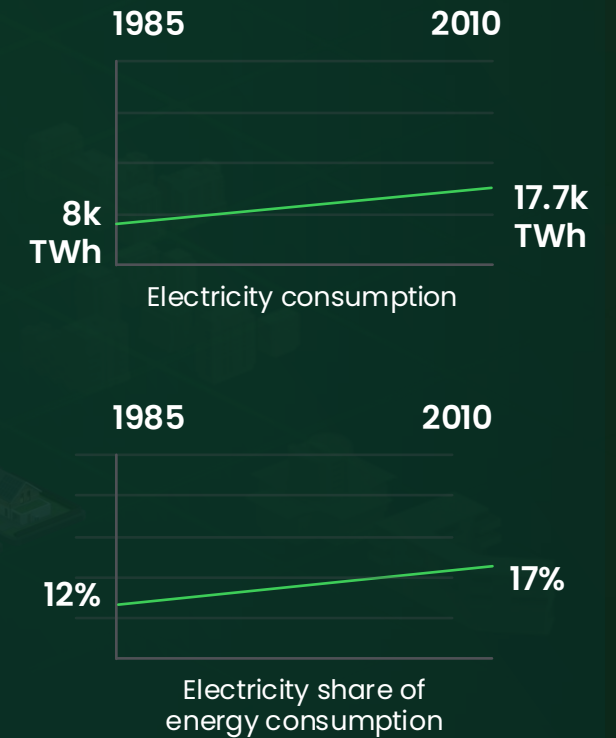
SUPPLY



Electricity Generation Mix



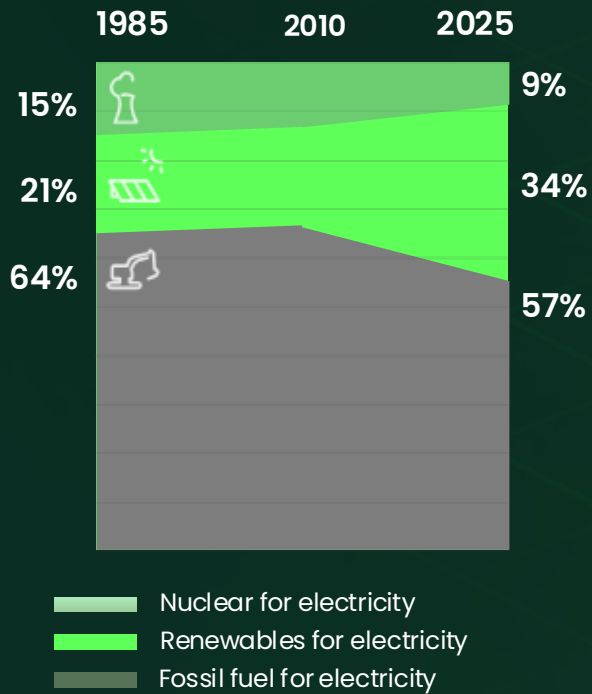
DEMAND



Present | Visible and connectable energy systems

But the grid is evolving... more distributed, more direct current, more demand

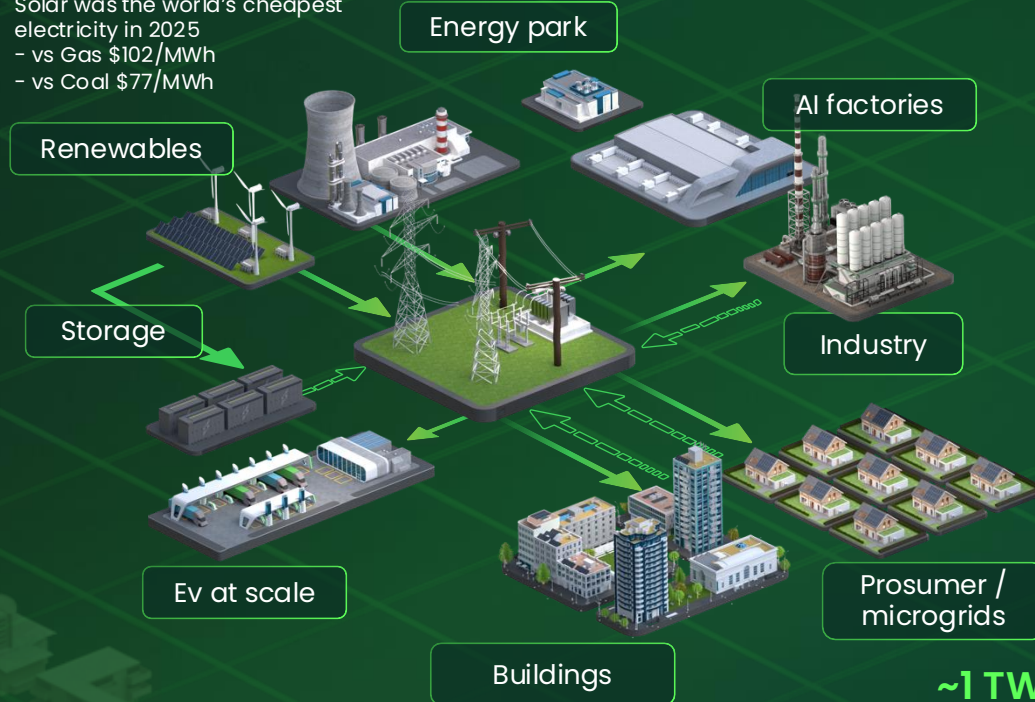
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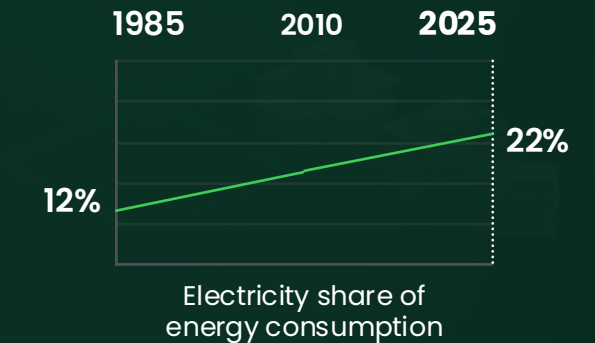
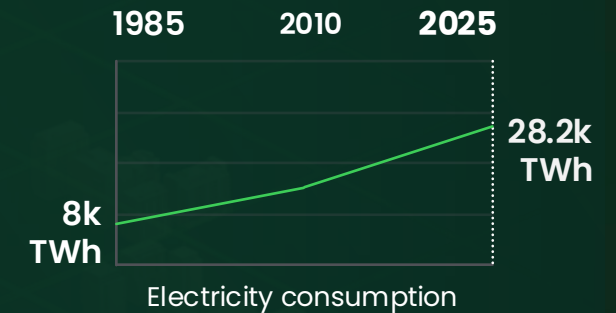
Electricity Generation Mix

\$39/MWh

Solar was the world's cheapest electricity in 2025
- vs Gas \$102/MWh
- vs Coal \$77/MWh



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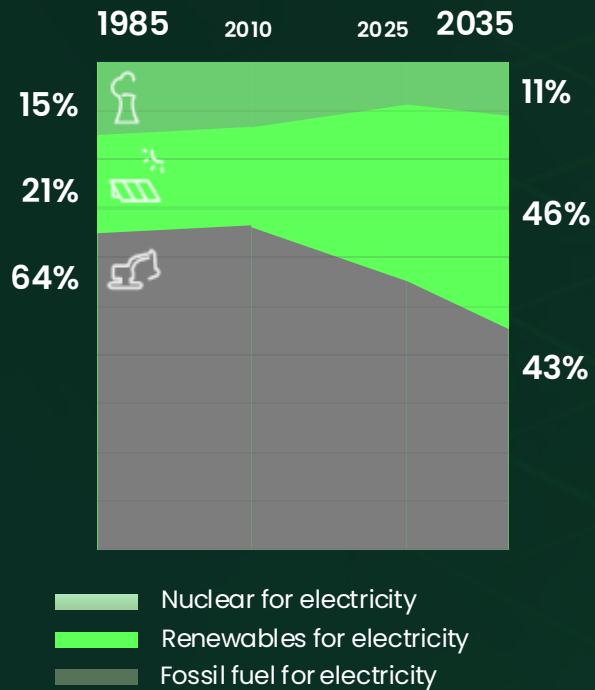


~1 TW
Rooftop solar
(Today)

Future | Intelligent & autonomous energy systems

And it is only accelerating; +10,000 TWh by 2035

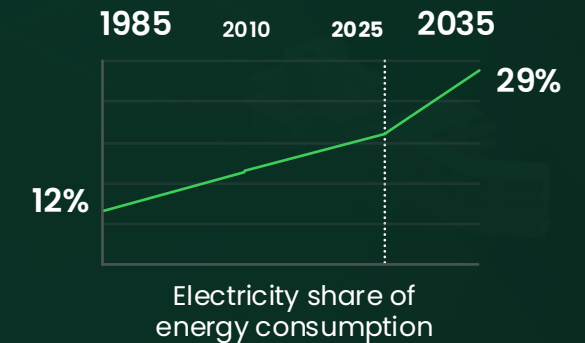
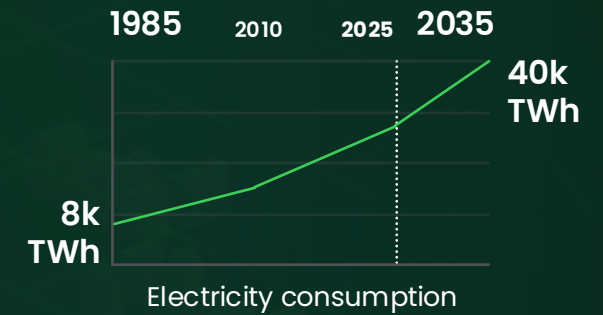
SUPPLY



Electricity Generation Mix



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The New Energy Landscape needs **Energy Intelligence**

But let's put that in **context...**

Energy efficiency
potential with AI

20%

enable up to 20% energy
efficiency improvement
across end-use segments



Sustainability
potential with AI

4-10x

enable up to 1,400 Mt CO₂
reductions by 2035, up to 4-10x
its own emissions footprint.

*Sources: IEA , BloombergNEF



Technology
already exists to trigger this new era

A technology **shift...**

More electric?

Imagine a future where we **decarbonize the supply** and **massively electrify the demand...**

- ✓ More **distributed energy resources** everywhere
- ✓ More **power converters** to support the electrification of processes, buildings, transportation
- ✓ Distribution networks **connected or not** to the grid
- ✓ Leveraging **resources** in AC and DC



More **electronic power.**
More **software.**

A technology **shift...**

More digital?

Imagine a future where we use digital technology at scale to **drive demand optimization**

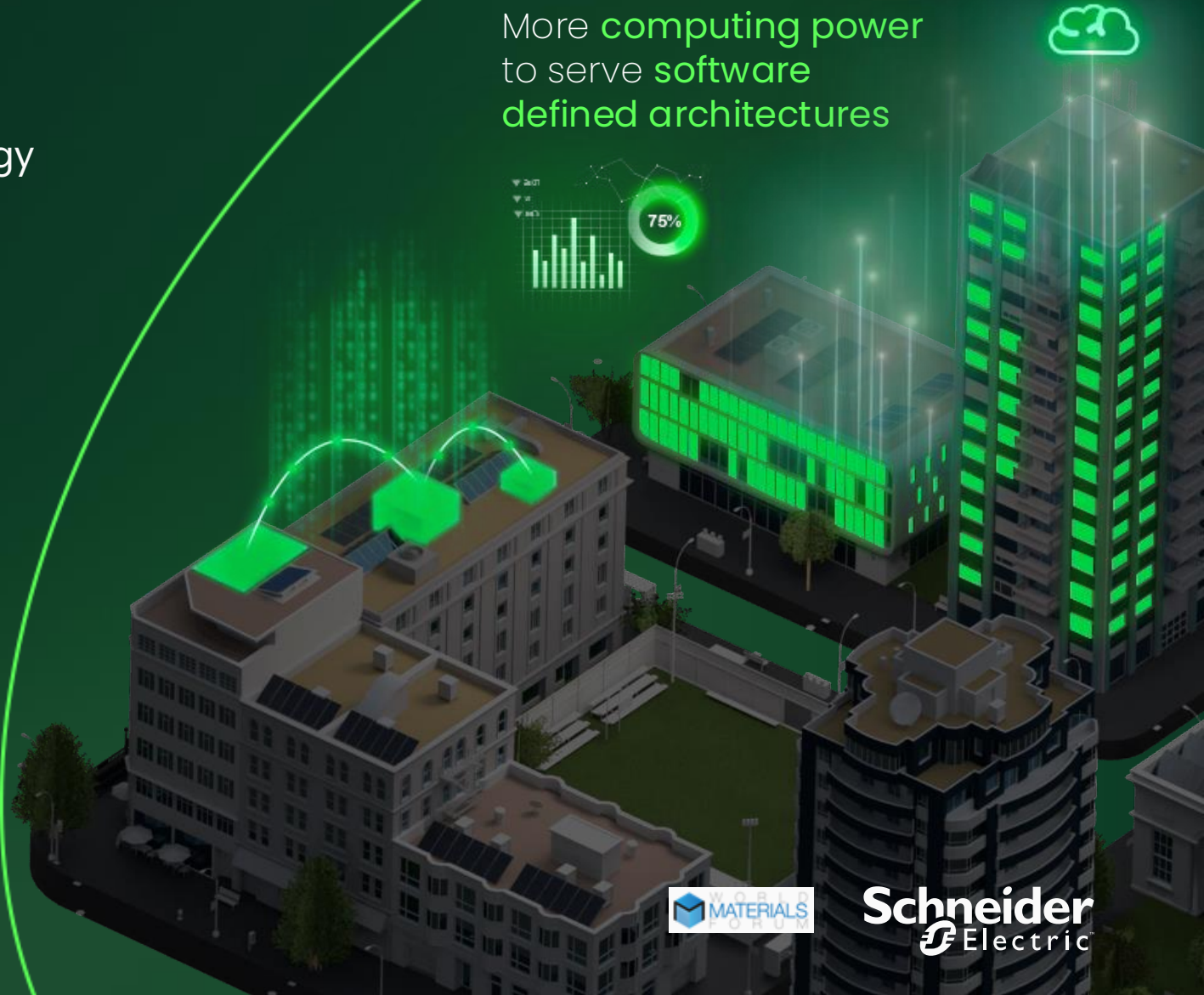
✓ **Sensors** everywhere

✓ More data, much more.... calling for **more artificial intelligence down to devices**

✓ **Connectivity** everywhere

✓ Seamless **cybersecurity**

More **computing power** to serve **software defined architectures**



Material resilience is more than ever, an **innovation challenge**...

Conductor	Copper	↑
Sensor & Actuator	Rare Earths, Nickel, Cobalt, Manganese	→
Electrical Contacts	Silver, Nickel, Graphite, Copper, Tungsten, Tin	↓
Battery	Lithium	↑
Digital Technologies	Semiconductors....	↑

Embrace the dependence to better manage it...

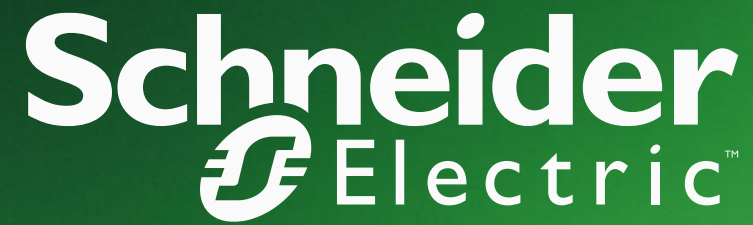
- 1 Secure** the current situation
- 2 Decrease** the exposure
- 3 Change** the exposure

*Sources: IEA , BloombergNEF

And yes, we need to deal with **complex bottlenecks...**

- ⚠️ Grid infrastructure can't scale fast enough
- ⚠️ Permitting is the single largest cause of infrastructure delay
- ⚠️ The technical workforce is a constraint that capital cannot fix
- ⚠️ Efficiency comes from seeing & using what already exists
- ⚠️ Critical minerals face growing supply gaps and rising geopolitical risk

- ✅ Digital technology is the only lever that can truly change the game
- ✅ Resilience is built in, not bolted on
- ✅ Sustainability is a natural output of a well-orchestrated system



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