



Starka kunder förbättrar konkurrenskraften!

-Customer trendspotting

April 19, 2017

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Let the trend be your friend!



Global trends in play - the market is re-shaping

Customer with invested interests are challenged...

Two gear world ... expanding and contracting installed capacity

2040: MW  and installed base will shift W  E

Energy prices under pressure

Overcapacity and politics affect the prices

Weather dependent production challenge base load model

Lower entry barrier for intermittent production

OEM Industry restructuring embroil Nuclear Utilities

Exposing customers to elevated execution risks



Key areas for customers to address

In choppy waters, create alternatives and focus on the goal

Cost level pressure is here to stay...

- new lower OPEX level needed
- old exclusive ties needs to be evaluated going forward

Future OEM Industry uncertainty... keep competence at arm reach

- core competence needed for maintaining operation

Market “set-up” needs to be re-aligned

- CAPEX moves to maintain capacity
- OPEX \$/MW is lower and MW are declining

Holistic cost perspective ... Back-end fees needs to be proven sufficient

- The back-end phase key focus, aligned incentives to meet the overall goal



Empower to take control!

Strong customers extended control to align OPEX to a competitive level – detected movements...

Analytical tools ... release the knowledge to the customer

-By making data accessible and actionable customer can better control its future

Extend control over destiny ... supplier overcapacity needs to be handled

-The OEM side needs to create value solution to the new requirements

Abandon models ... new ways of releasing scale of economy is needed

-Industry needs to cooperate internationally to regain sufficient scale of economy



Imagination at work

