

# THE EMERGING ENERGY VALUE ECOSYSTEM

## Grounding Utilities' Dream for New Revenue Streams

Research with 120+ Utility Executives Across UK and 12 European Countries

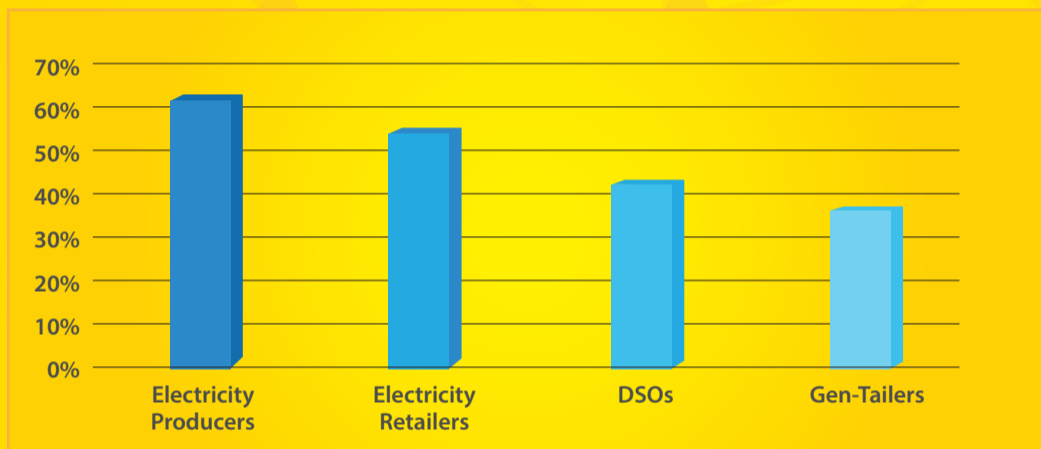
### The Business Impact of New Revenue Streams

New energy products and services will contribute to more than **10%** of revenues for **36%** of European utilities.



### The New Focus Area

How many utilities across the value chain expect more than **10%** of their revenues to come from new energy services in the next **2-3 years**?

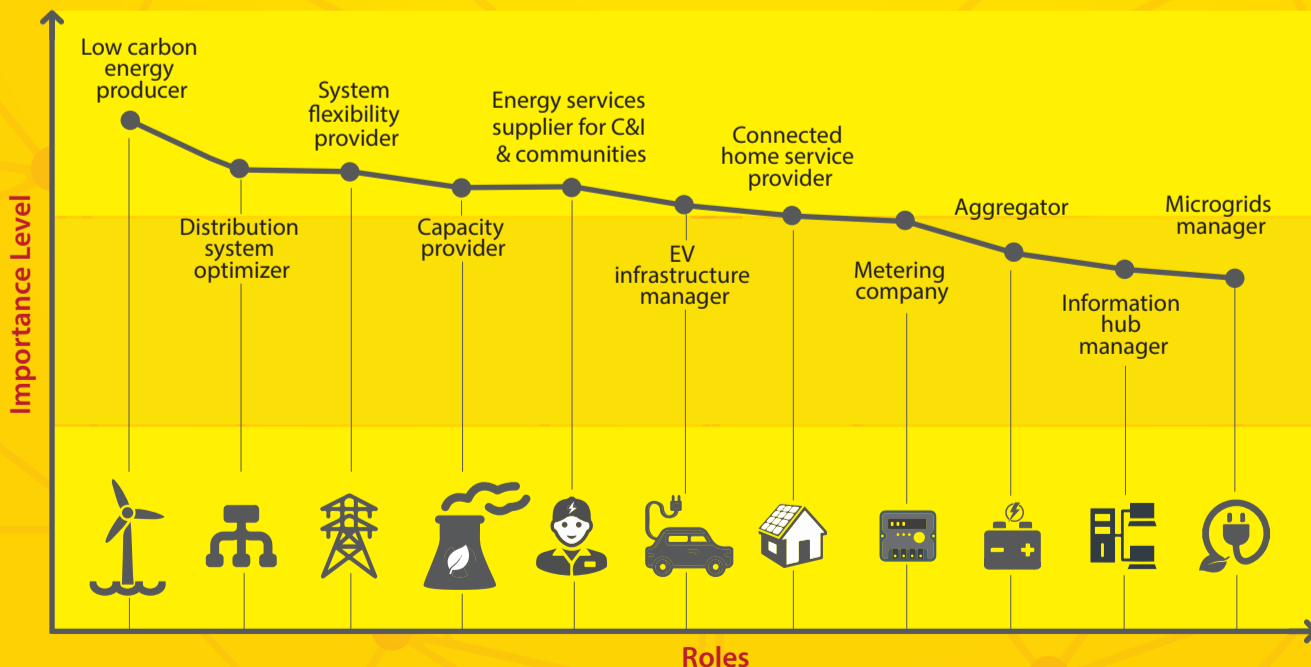


### Where Will the New Revenues Come From?

**79%** of European utilities believe **Distributed Generation** is the key to new revenue streams



### The Role European Companies Will Play in 2020



n=120

Source: IDC Energy Ecosystem Survey, 2017 - commissioned by TCS