

Webinar: The Workplace In the Utilities Sector: A New Approach for the Age of Reinvention

FUJITSU



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Agenda



1 An Industry with an Identity Crisis

2 The Utilities Workplace in 2018

3 Practical Steps to Bridge the Divide

4 Q&A

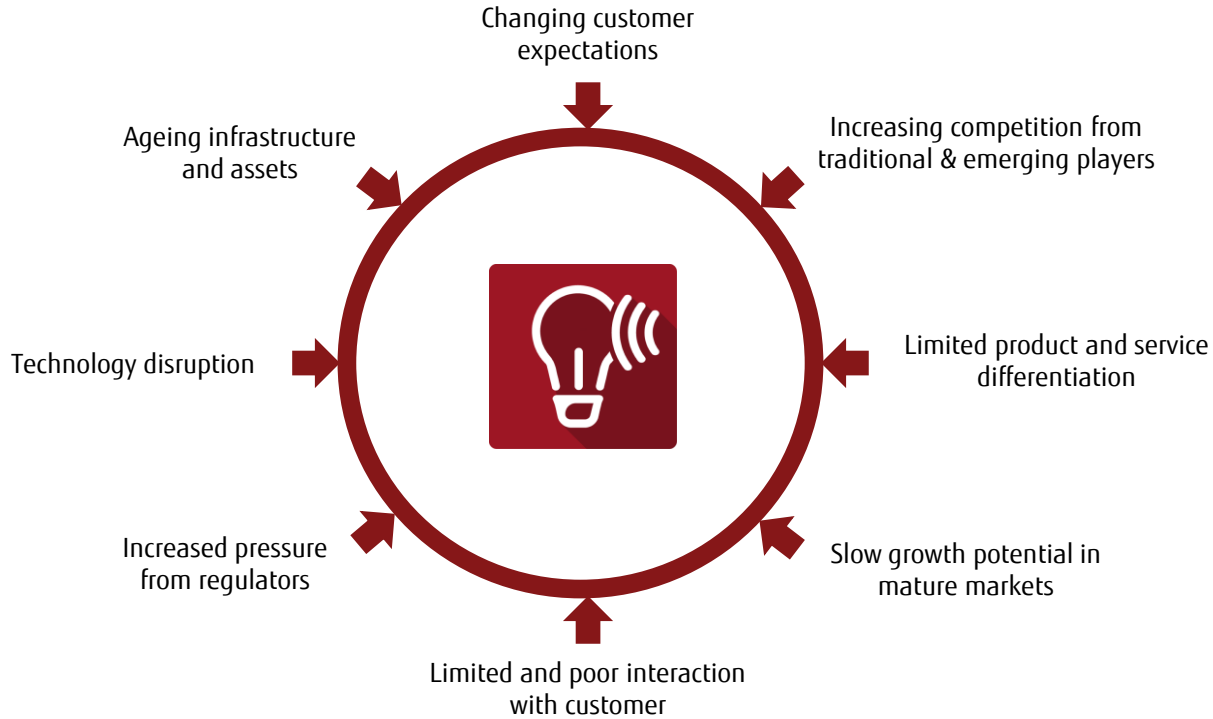
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An Industry with an Identity Crisis



1.75m

The combined number of customers lost by EDF Energy and Centrica in 2017

30%

Renewables share as percentage of electricity production in Europe in 2017

Source: Eurostat

Major Strategic Shifts are Playing Out

Transform the Core Business



Engie commits €22bn to refocus business on low carbon energy and integrated customer solutions



Enel is investing €17bn in renewables, grid technology and operational efficiency

Consolidate through M&A



EDF and Gas Natural make takeover approaches for Portugal's EDP



E.ON to acquire Innogy, which is in the process of merging its UK retail activities with SSE

Diversify & Disrupt



Centrica launches £100m "Innovations" venture to invest in new energy technologies



UK challenger Ovo acquires Corgi HomePlan, a home service engineering services firm

The Concept of the Workplace is Changing...



The Workplace in 2025



Cross-Generational Workplace

- *Knowledge sharing between polarized workforce*
- *Continuous learning enhanced by augmented reality*



Intelligent Workplace

- *AI drives efficiency and personalization*
- *Virtual assistants provide dynamic support*



Lifestyle Workplace

- *Supports flexible & remote working*
- *Designed to enhance wellness and health*



Low Impact Workplace

- *Virtual meetings replace commutes*
- *Office environments become truly smart & connected*



Boundary-less Workplace

- *Co-creation through digital ecosystems*
- *Crowdsourcing drives innovation at scale*

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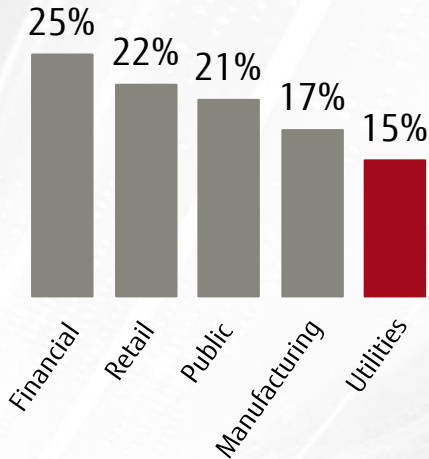
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The Voice of the Customer



1,278 CXO-level decision-makers interviewed across 16 countries.



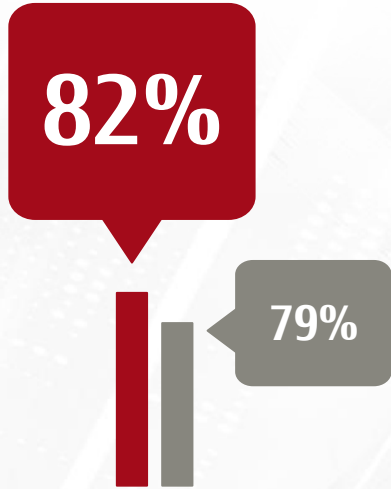
Participants based in five major industry sectors, with 15% (192) in the retail industry.

About PAC

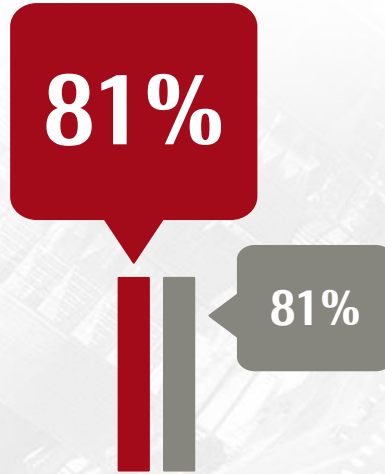
CXP Group is the #1 independent European research and advisory firm in the field of digital, software and IT services.

Every year the group supports more than 1,500 large and medium-sized business-user organizations in their sourcing decisions and investment projects

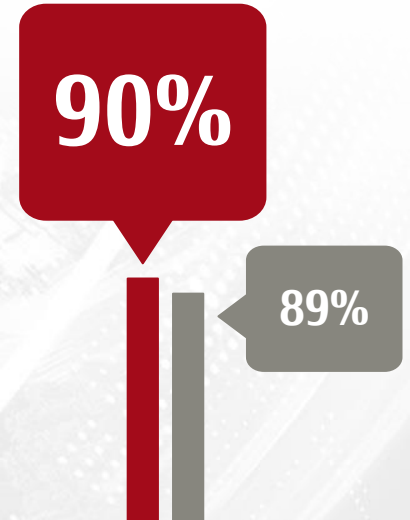
Today's Workplace is Falling Short



Admit their current working hours & practices are **not flexible enough** to get the most out of their workforce



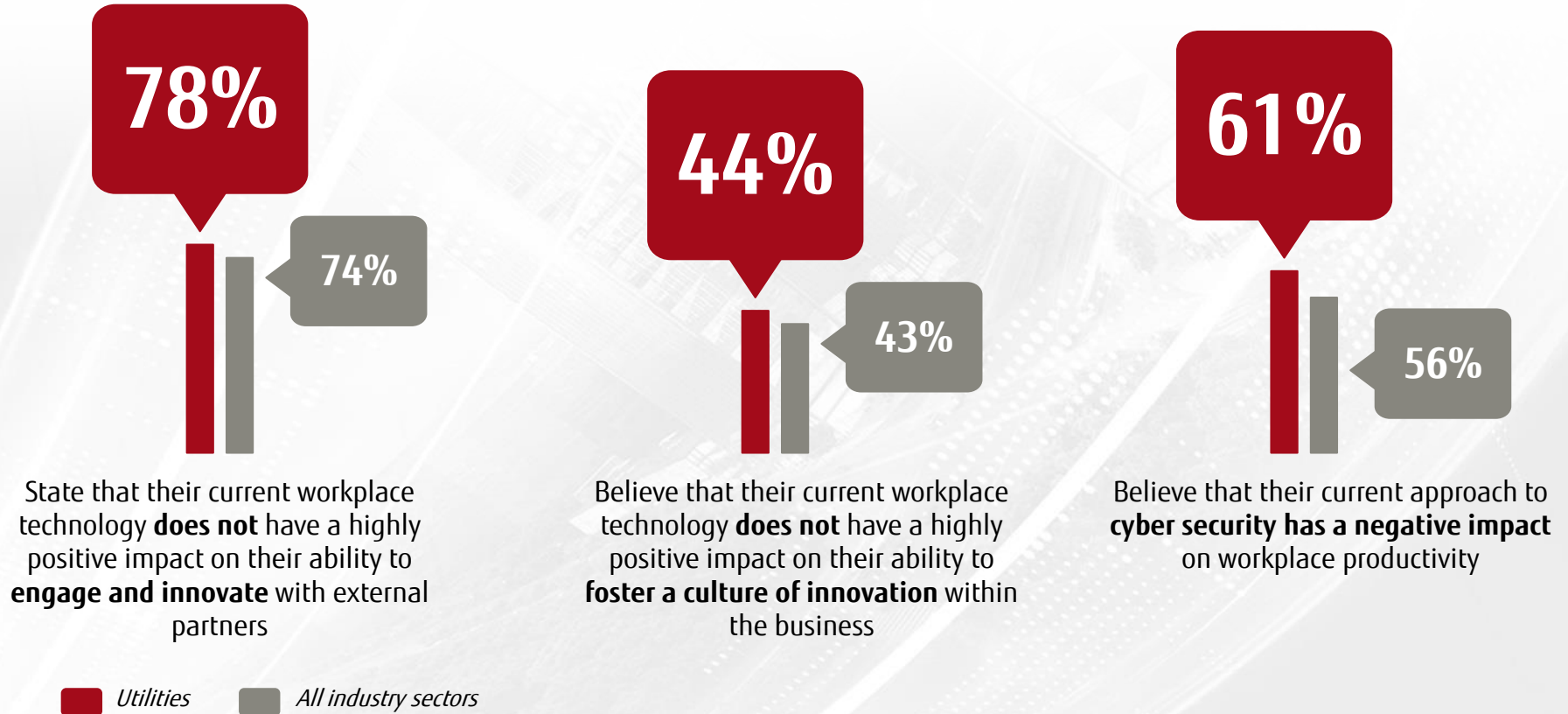
State that **high workforce attrition** is a significant challenge to productivity in their organization



Claim that the **complexity of current workplace technology** is holding back their employees

Utilities All industry sectors

Workplace Technology is a Barrier to Innovation



Bridging the Divide

2018 Workplace

- Designed to support 9-5 office-based working
- Struggling to attract & retain the best talent
- Technology as a workplace productivity barrier
- Workplace security slowing the workforce down
- Holding back ability to harness external innovation



2025 Workplace

- Designed to support flexible, remote working
- Providing a compelling, personalized user experience
- Intelligent workplace underpinned by AI
- A less intrusive but more robust cyber approach
- Supporting co-creation through digital ecosystems



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Centrica | Multinational Utility Company



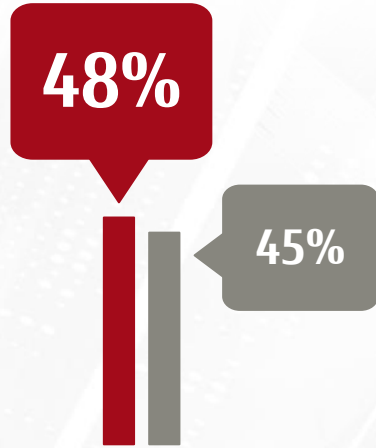
Industry Challenges

- Facility-based workers want mobile access to deal with issues on location, while customer service employees demand the ability to work remotely
- Utilities organizations increasingly seek help from external partners to create a better workplace experience

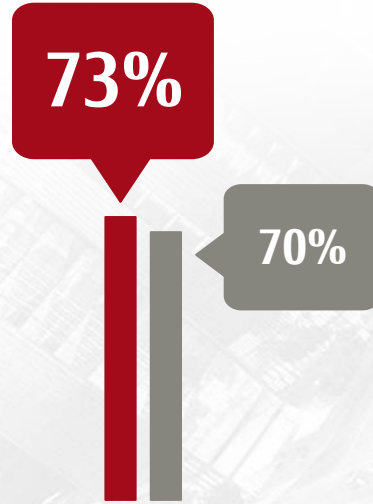
Fujitsu's Response

- User centric digital platform to enable its 45k global employees to collaborate across the company with scalable and flexible services and mobility at its heart
- Fujitsu's trusted best in class Managed Workplace Services with Windows 10, Office 365, access to Cloud services, collaboration tools and Evergreen services

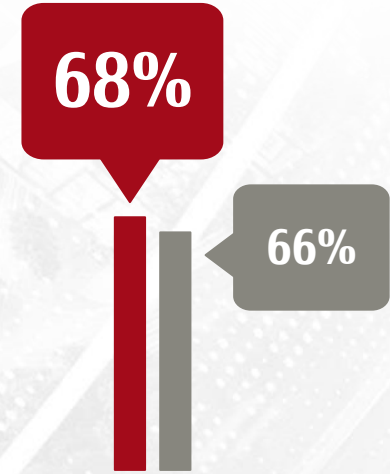
Your Peers are Making Big Policy Changes...



Are changing corporate policies to ensure access to tools/ platforms to **create and share innovation** with the wider ecosystem



Are implementing new policies to improve the **work/life balance** for their employees

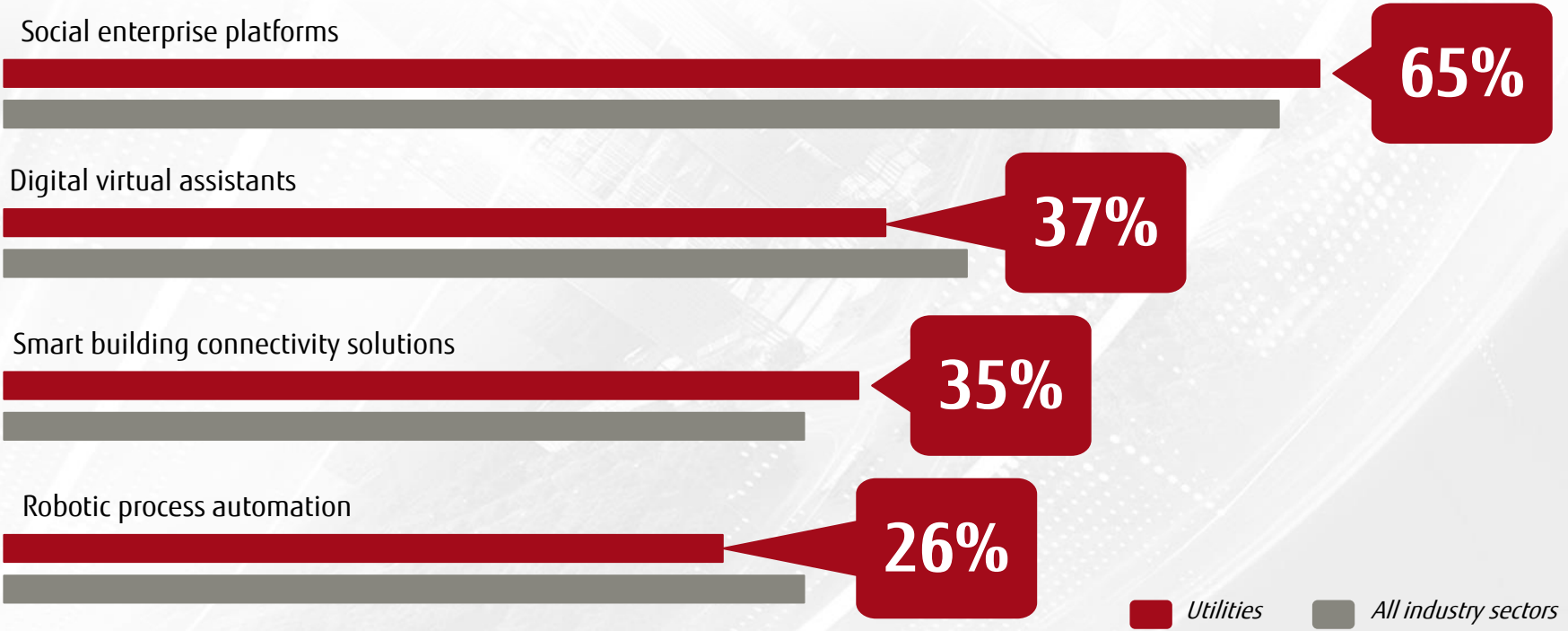


Are changing corporate policies to provide an **agile and compelling** workplace experience.

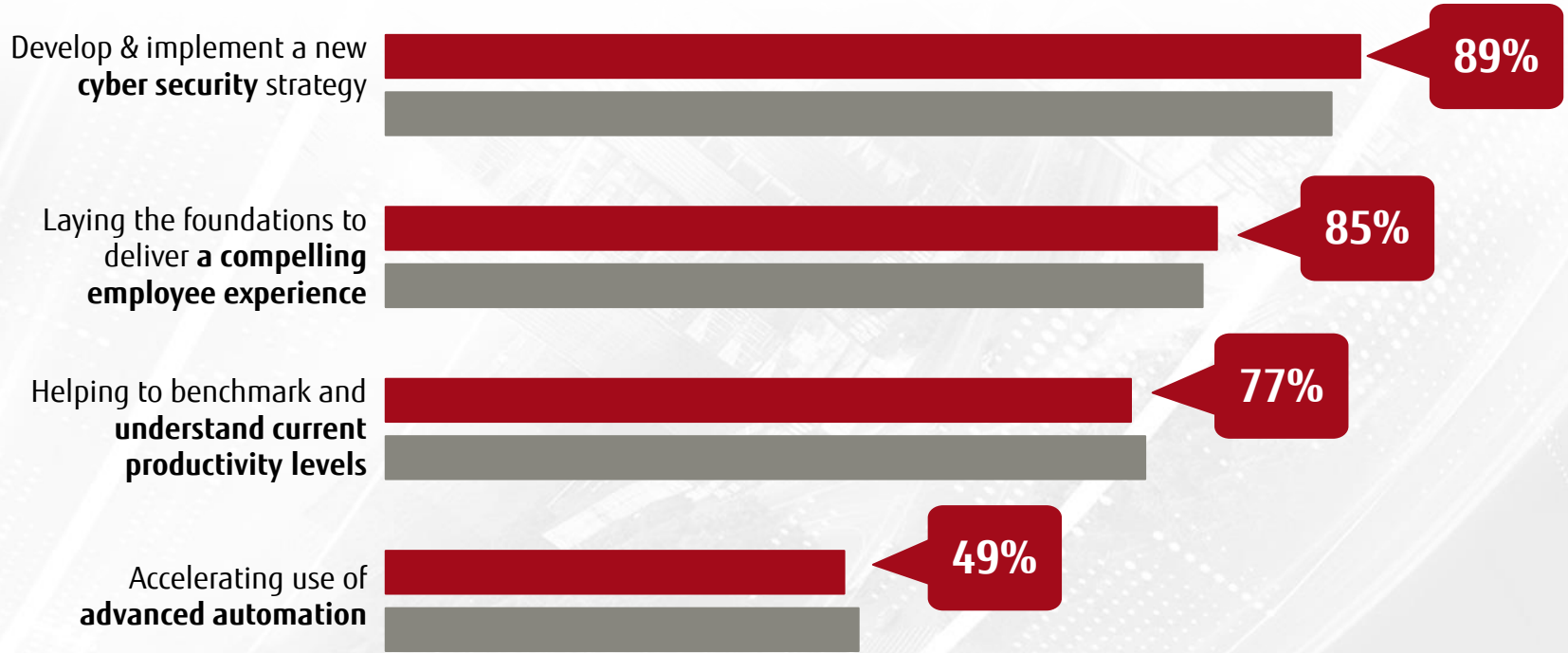
Utilities All industry sectors

..And Investing in Tech to Transform the Workplace

Four areas where utilities plan strategic technology investment in the next two years...



External Help will be Vital



Utilities All industry sectors

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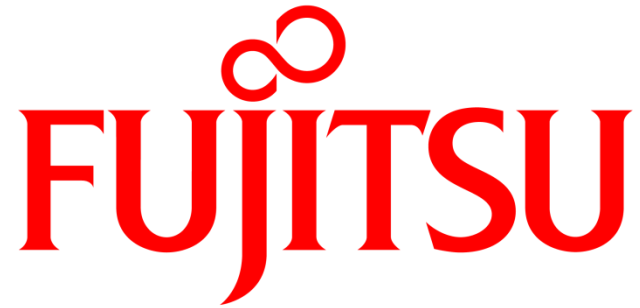
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To learn more visit www.Fujitsu.com/workplace2025
or
Email: Digitalworkplace@uk.Fujitsu.com

The logo features a red infinity symbol positioned above the word "FUJITSU". The word "FUJITSU" is rendered in a bold, red, serif typeface. The letter "J" is notably stylized with a long, sweeping tail that curves downwards and to the left.

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shaping tomorrow with you