



**Press conference**

# **Commercial strategy of the Customers, Services & Territories division**

29 June 2022



The EDF Group's response to the climate emergency

## EDF, committed to the climate



### Science Based Targets (SBTi) certification

In December 2020, EDF is **certified by Science Based Targets Initiative** with a reinforced CO2 reduction trajectory well below 2°C



### The EDF Group's climate transition plan

- Reduction of the Group's GHG emissions,
- Adapting facilities to climate change,
- Development of decarbonized electricity usage,
- Strengthened governance to meet objectives.

**Resolution voted in favour by 99.87% of shareholders** General Meeting of 12 May 2022

#### Say On Climate:

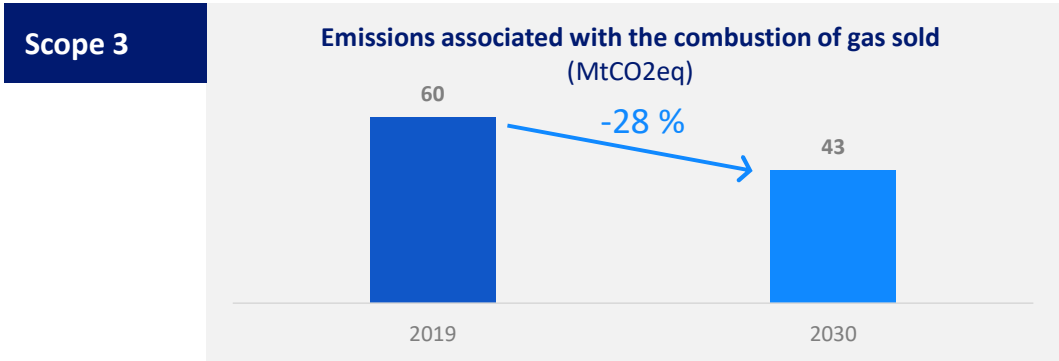
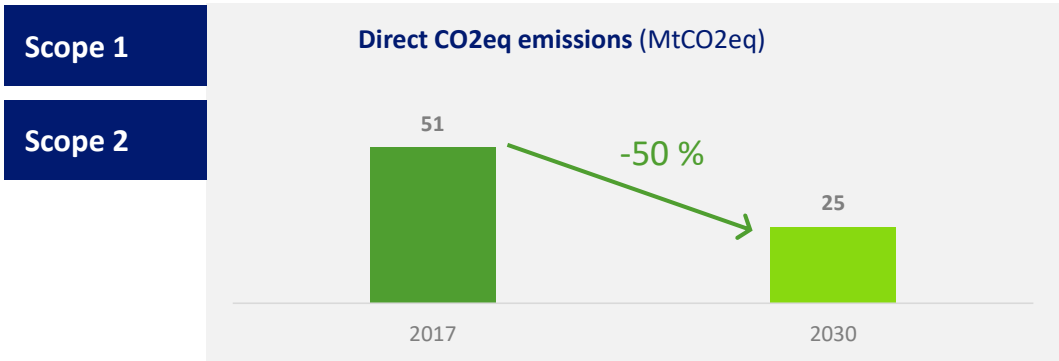
Shareholder Voting on  
Climate Transition Action Plans



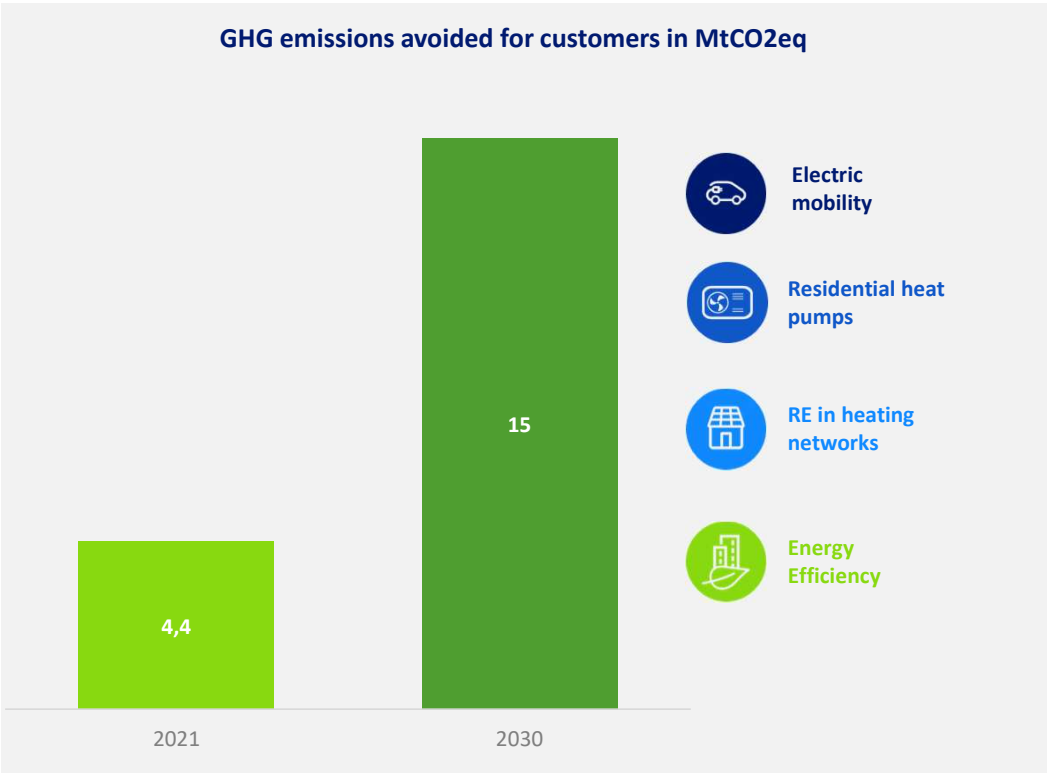
Build a net zero energy future with electricity and innovative solutions and services, to help save the planet and drive wellbeing and economic development



# Ambitious CO2 emission reduction targets for EDF and its customers



Group figures



EDF SA and Dalkia figures

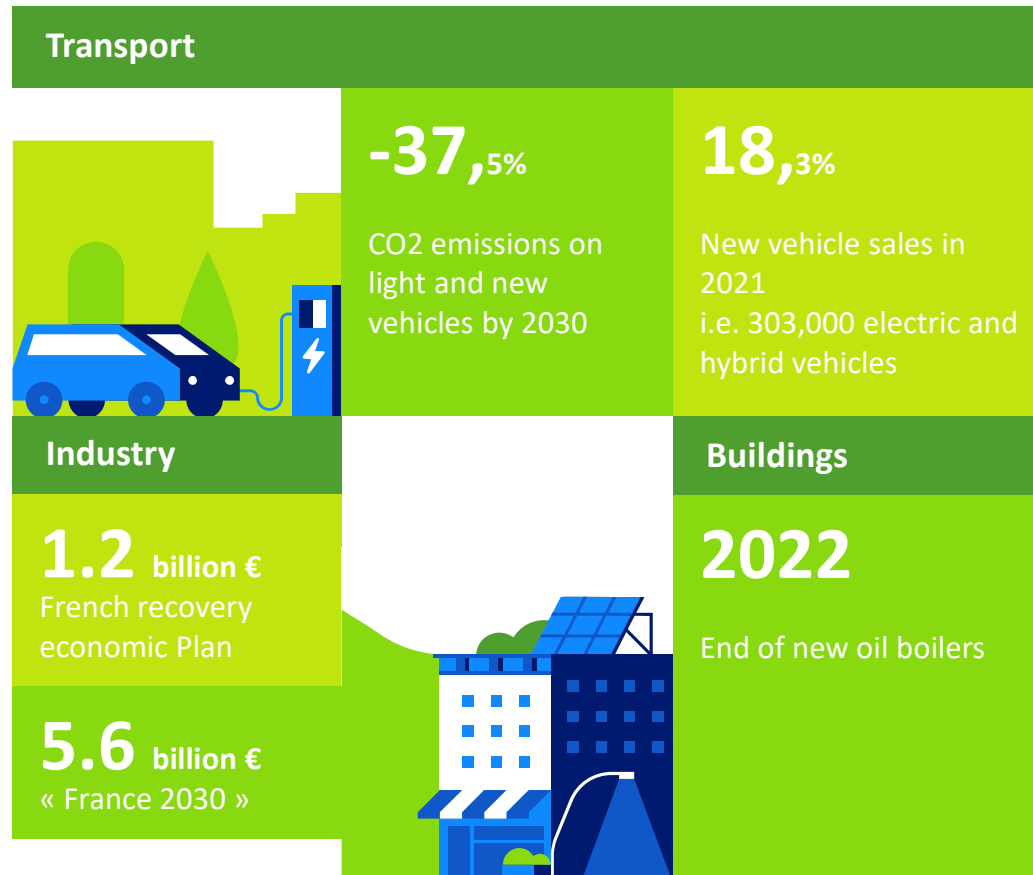
→ The Customers,  
Services & Territories  
Division, EDF Group

“

A major player  
in decarbonization at  
the service of  
economic and  
climate performance  
of its customers

”

## A commitment by all actors to the energy transition



### Individuals

**The environment is the number one concern for 57% of 16-24 year olds**

*Source Obs'COP 2021*



### Companies

**Net Zero 2050: 53** major French companies with the SBTi label have set themselves a Net Zero trajectory to 2050



### Territories

**Territory Ecological Transition: 143** territories already labelled "Climate Air Energy" out of the 220 currently committed

# EDF committed to energy efficiency for all its customers

## BtoC

### « Mes Eco & Moi »

→ Tips and tools to reduce energy consumption

→ Up to 12% reduction<sup>(1)</sup> by regularly monitoring your consumption and changing your behaviour

### Communication

→ Awareness campaign on energy saving and eco-actions

### Services

→ Promotion or sale of energy services to reduce consumption (energy renovation, heat pumps, etc.)

## BtoB

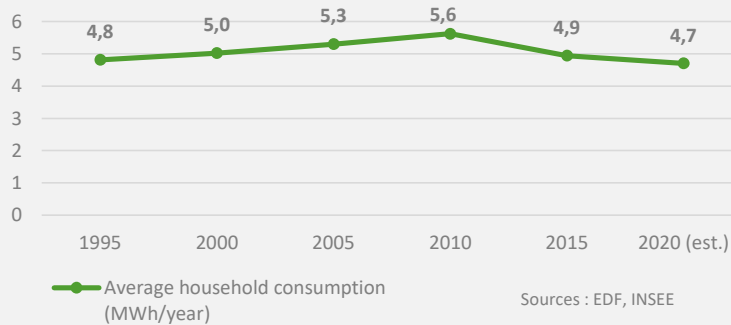
### Raising customer awareness

→ Reducing consumption heating, lighting, shifting certain uses to off-peak hours

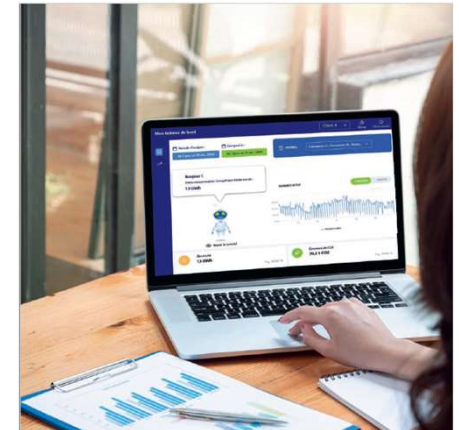
### Services

→ Promotion of energy services to reduce consumption (Intelligent Building Management, Energy Performance Contracting)

Average consumption per household

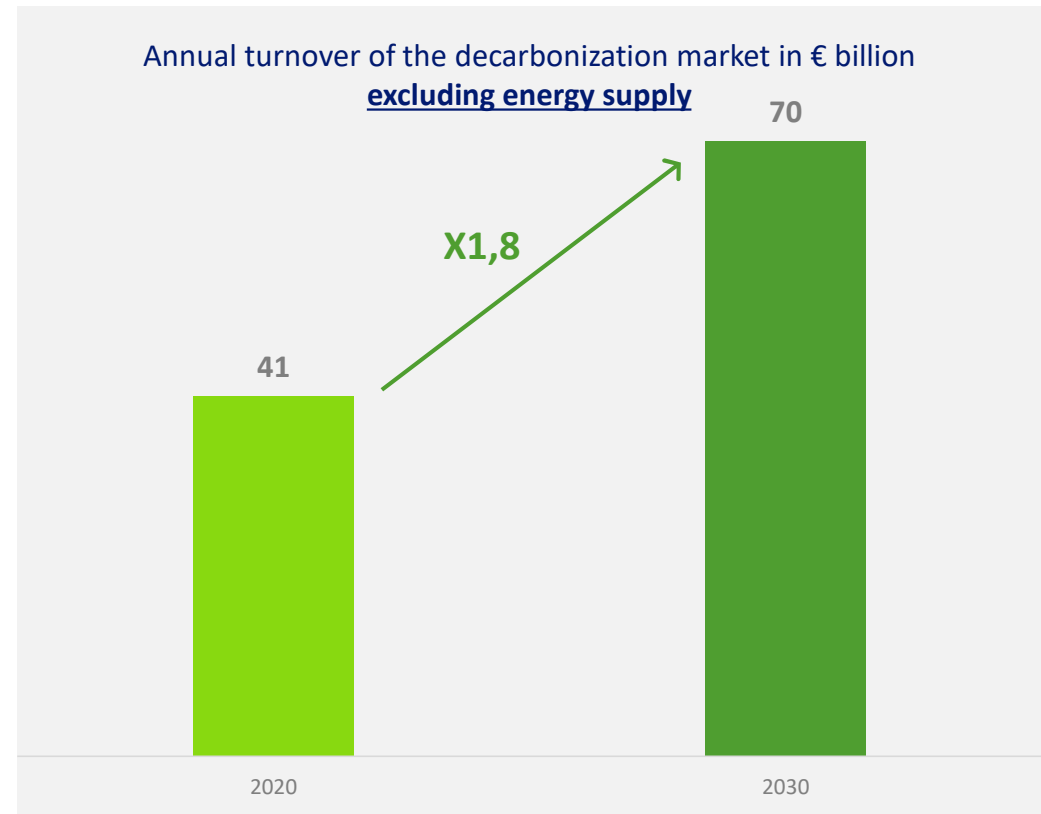


(1) Source: EDF. Study conducted on a sample of 1.1 million customers. The decrease in consumption increases with the number of connections; a 12% decrease in electricity consumption was observed for Linky customers who connected more than three times a month.



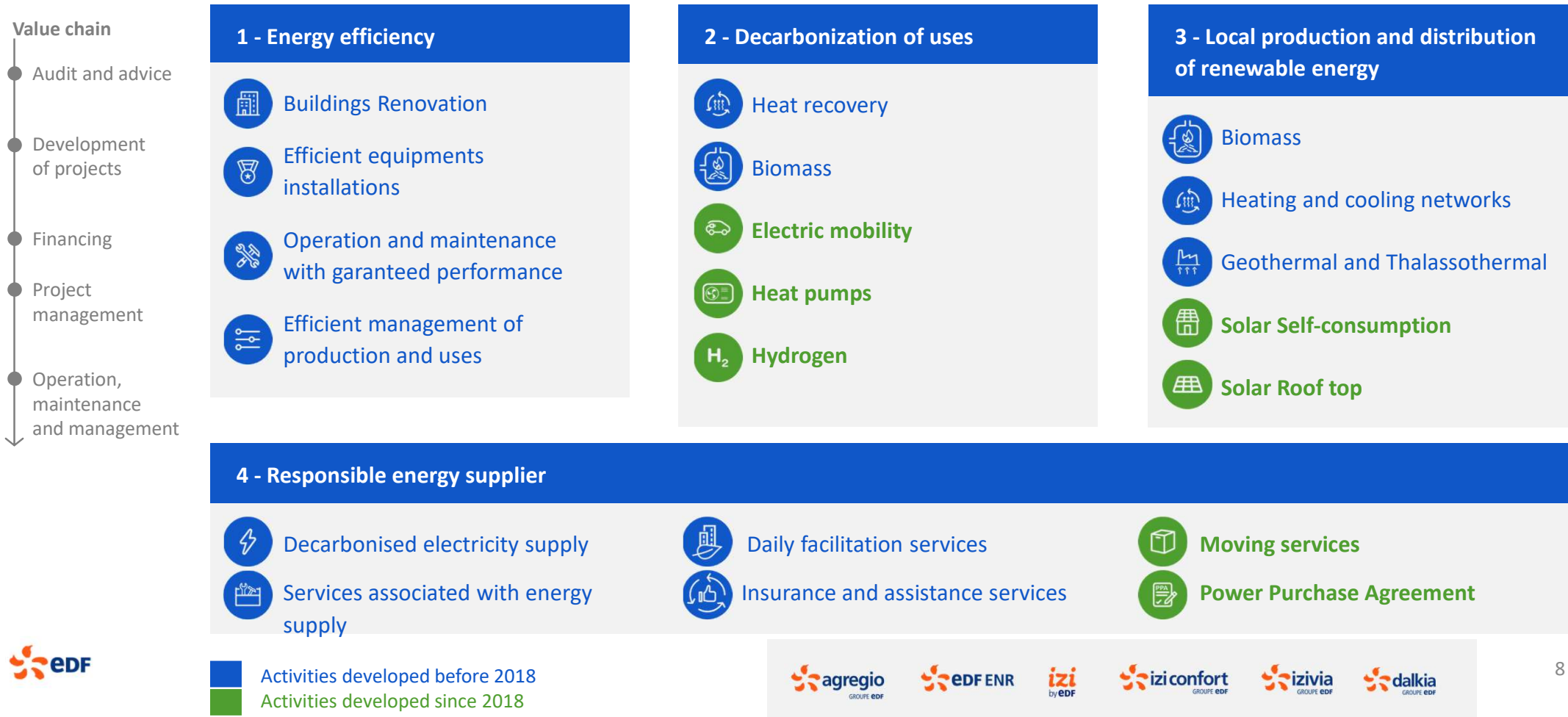
## Doubling of the decarbonization market by 2030

| Market                                    | Current market (M€) | Annual growth |
|---|---------------------|---------------|
| <b>Significant growing markets (2020)</b> |                     |               |
| Energy renovation                         | 20 200              | + 7,5%        |
| Heat networks                             | 1 800               | +4,9%         |
| Boiler & heat pump maintenance            | 3 000               | +3,4%         |
| Electrical engineering                    | 14 000              | +3%           |
| <b>Emerging markets (2020)</b>            |                     |               |
| Decarbonated hydrogen                     | < 100               | +15%          |
| Solar roof-top                            | 700                 | +14%          |
| Flexibility                               | 100                 | +11%          |
| Recovery of heat                          | 700                 | +11%          |
| Cooling networks                          | 100                 | +10%          |
| Electric Mobility                         | 400                 | +7,9%         |
| Biomass and solar heating                 | 300                 | +3%           |
| <b>Energy supply (2019)</b>               |                     |               |
| Electricity <i>(excluding losses)</i>     | 473 TWh             | +1,5%         |
| Natural gas                               | 502 TWh             | -1%           |



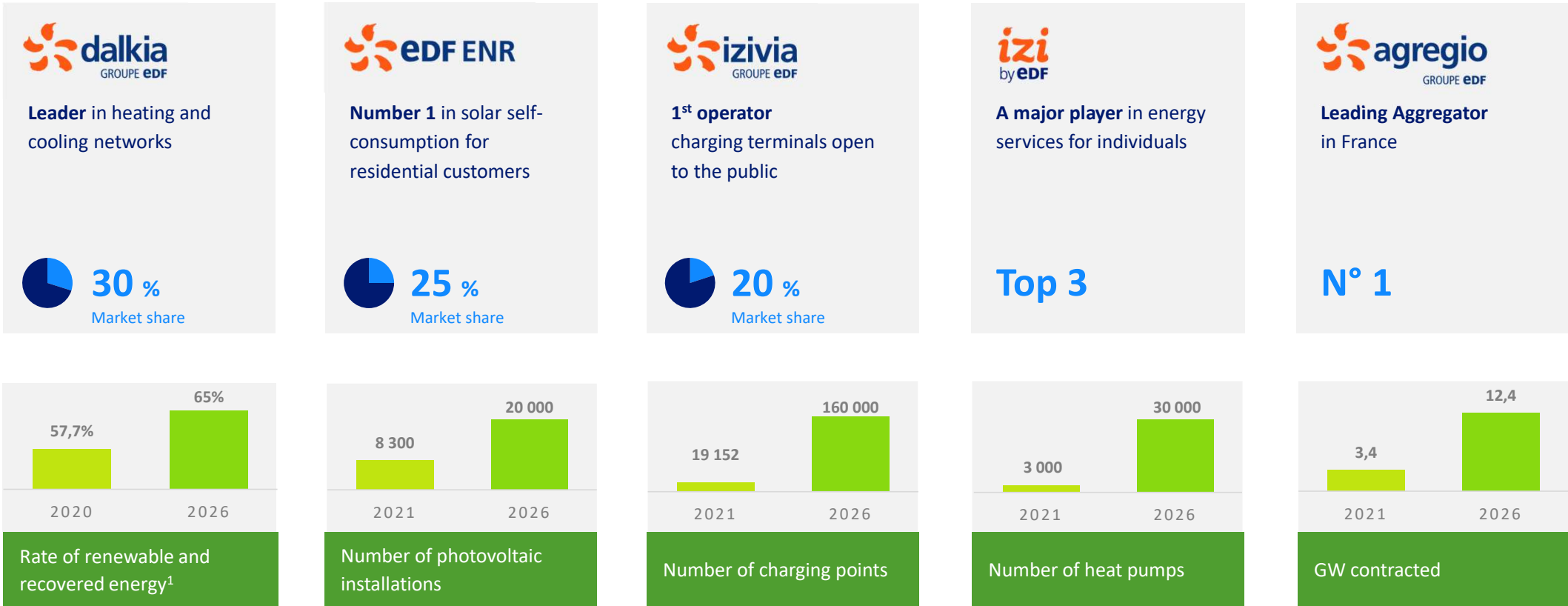
EDF / CVA analyses based on benchmark studies

# Coverage of all customer needs through a wide range of offers by EDF and its subsidiaries





# Leading positions and strong ambitions in growing markets



<sup>1</sup> Heating networks in France



→ Outlook  
of the Customers,  
Services & Territories  
division

## Self-financed growth with 50% plus EBITDA growth by 2030



<sup>1</sup> Conventional EBITDA

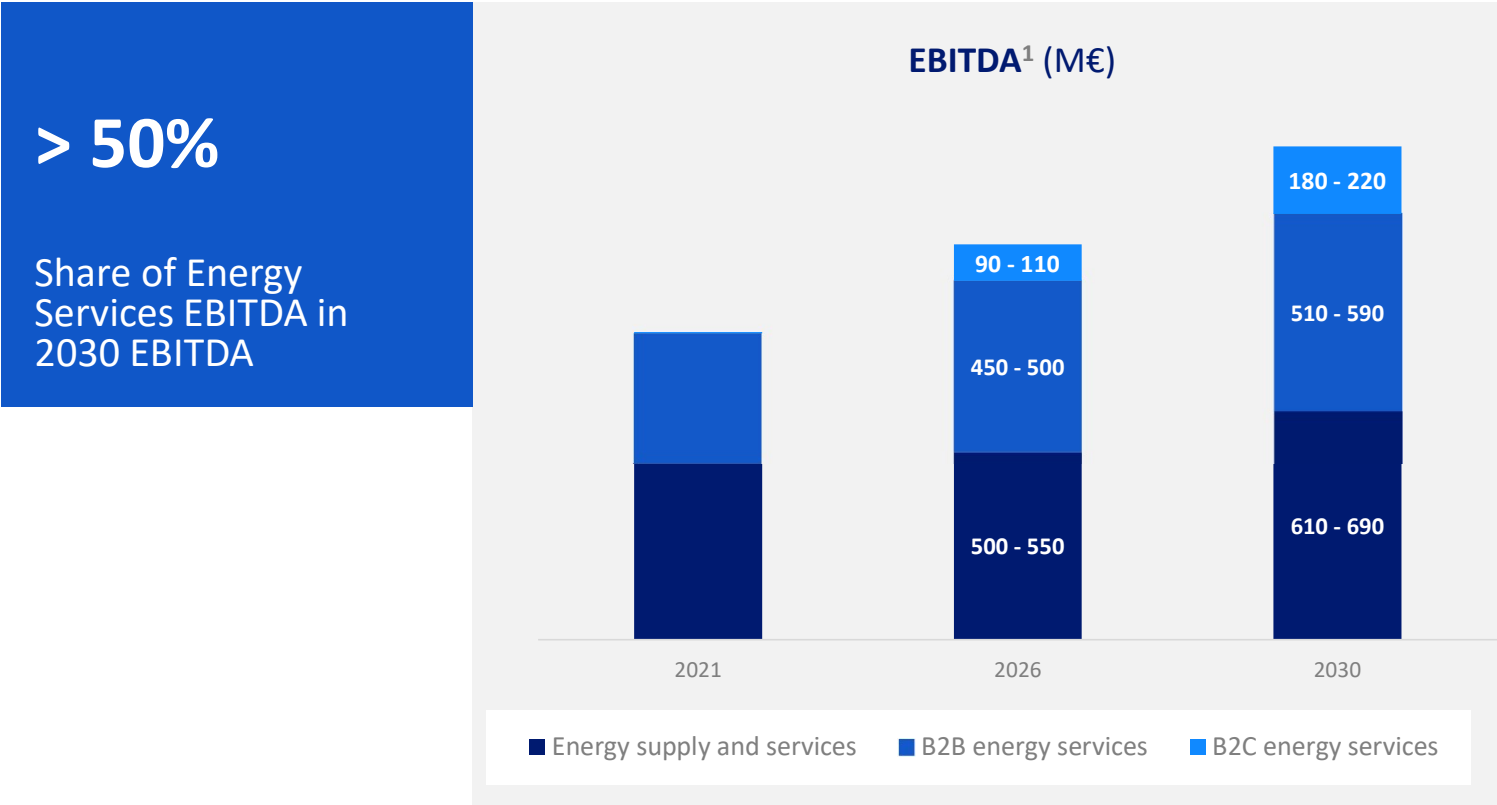
EBITDA

**$\Sigma = 8$  to 10  
billion  
2022 - 2030**

CAPEX

**$\Sigma = 3$  to 5  
billion  
2022 - 2030**

# A doubling of the EBITDA of energy services by 2030



## A significant ambition for profitable growth in emerging markets

### Emerging markets

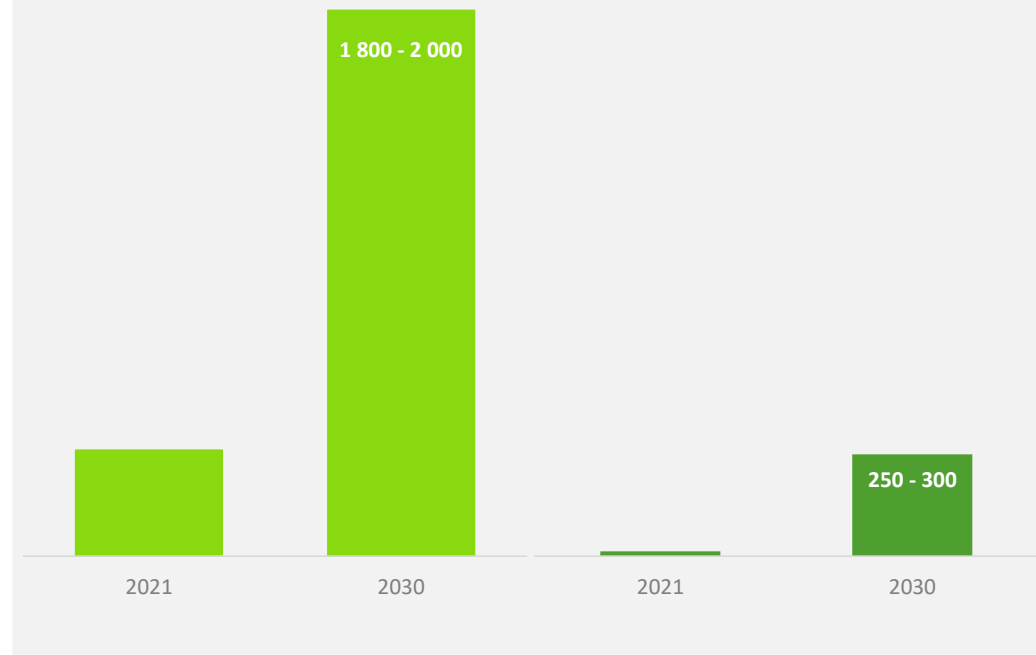
-  Energy renovation
-  Electric mobility
-  Solar roof topPhotovoltaic
-  Flexibility


### Subsidiaries involved



### Turnover (M€)


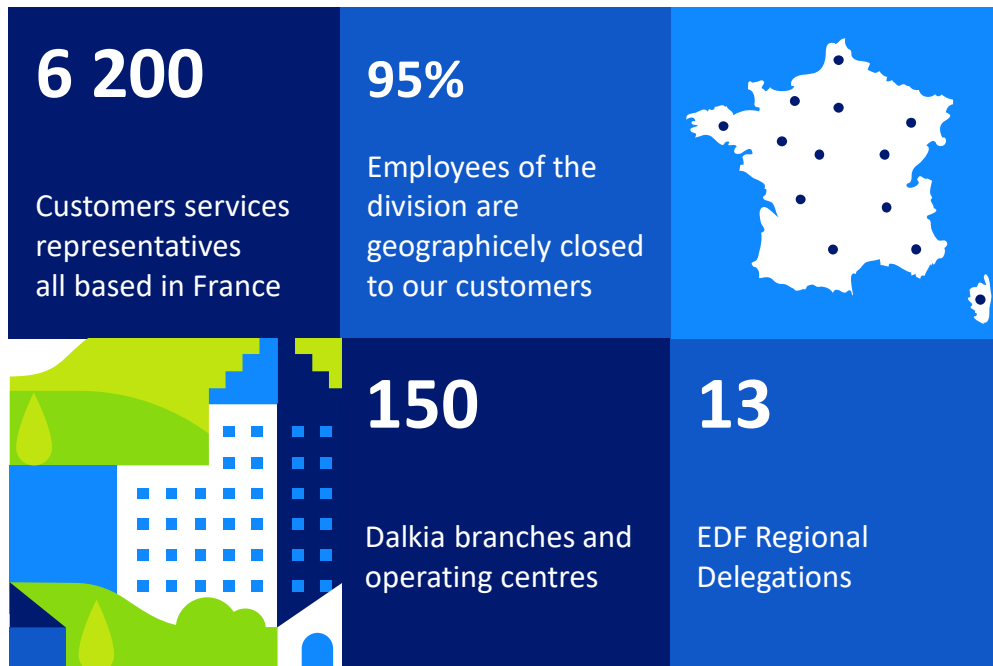
### EBITDA<sup>1</sup> (M€)






→ The Customers,  
Services & Territories  
division is committed  
to and close to its  
customers

## A unique territorial presence



### A force for commercial conquest

The only energy player to have such a strong presence in the territories.



### An actor in solidarity

The Customers, Services & Territories division supports its individual customers in a situation of unpaid bills by putting an end to power cuts.

## Customer satisfaction: a competitive advantage

**B2C**




**1<sup>st</sup> energy specialist**  
preferred by the French  
according to the latest IFOP ranking of the  
"most admired French companies" carried out  
in October 2021

**9 customers  
of 10**

Satisfied after telephone contact

**B2B**



**NPS\* > 40**  
In customer relations - energy supply

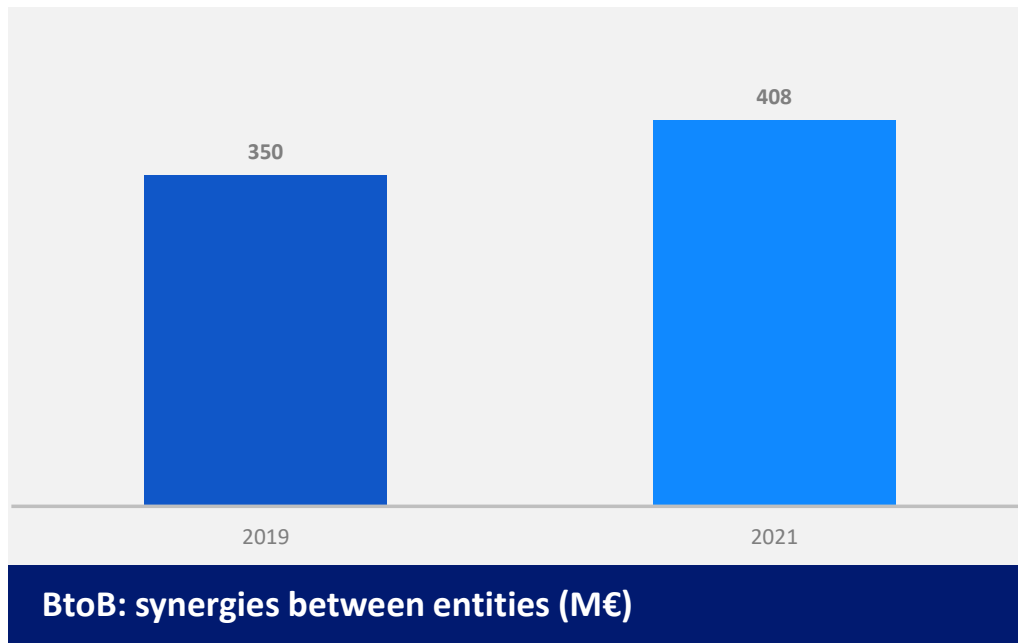
\* NPS: Net Promoter Score

**High level of  
of satisfaction**

Energy service subsidiaries' customers

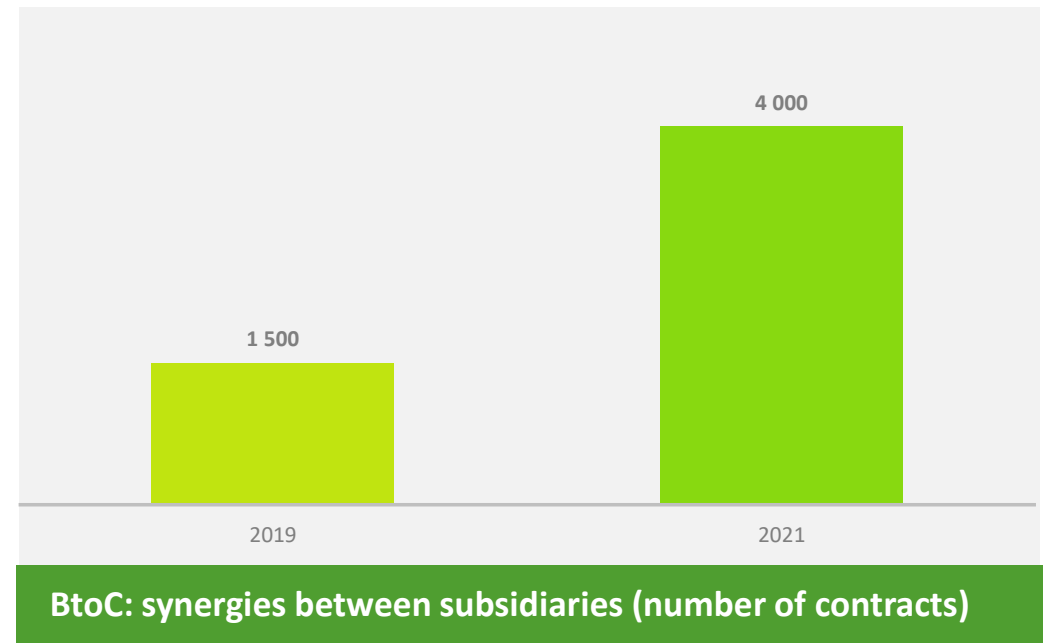


## Synergies on the rise since 2019



### BtoB value creation :

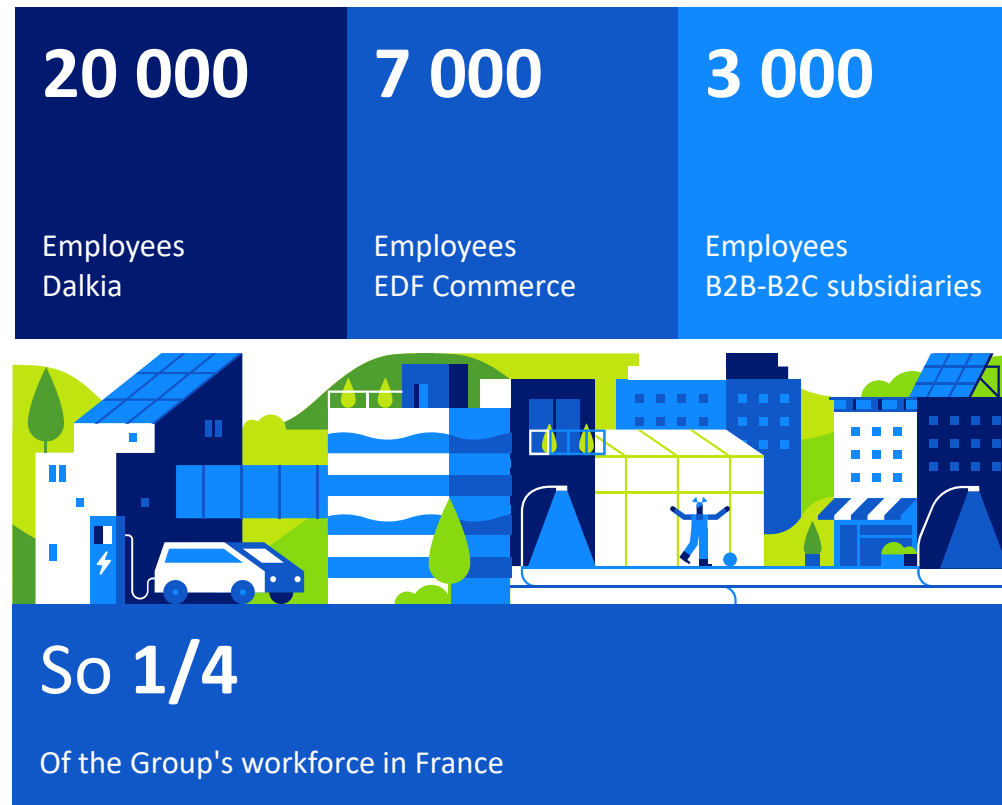
Synergies represent an average annual additional contribution of €400m to the CST division's revenues.



### BtoC value creation :

4000 additional contracts for installation and maintenance of heating equipment (up 30% vs. 2020).

## A human ambition at the heart of the Customers, Services & Territories division's strategy



### HR challenges

#### 3,500 recruitments per year

- The growth of the energy transition markets is creating a need for new skills

#### Strong employee commitment

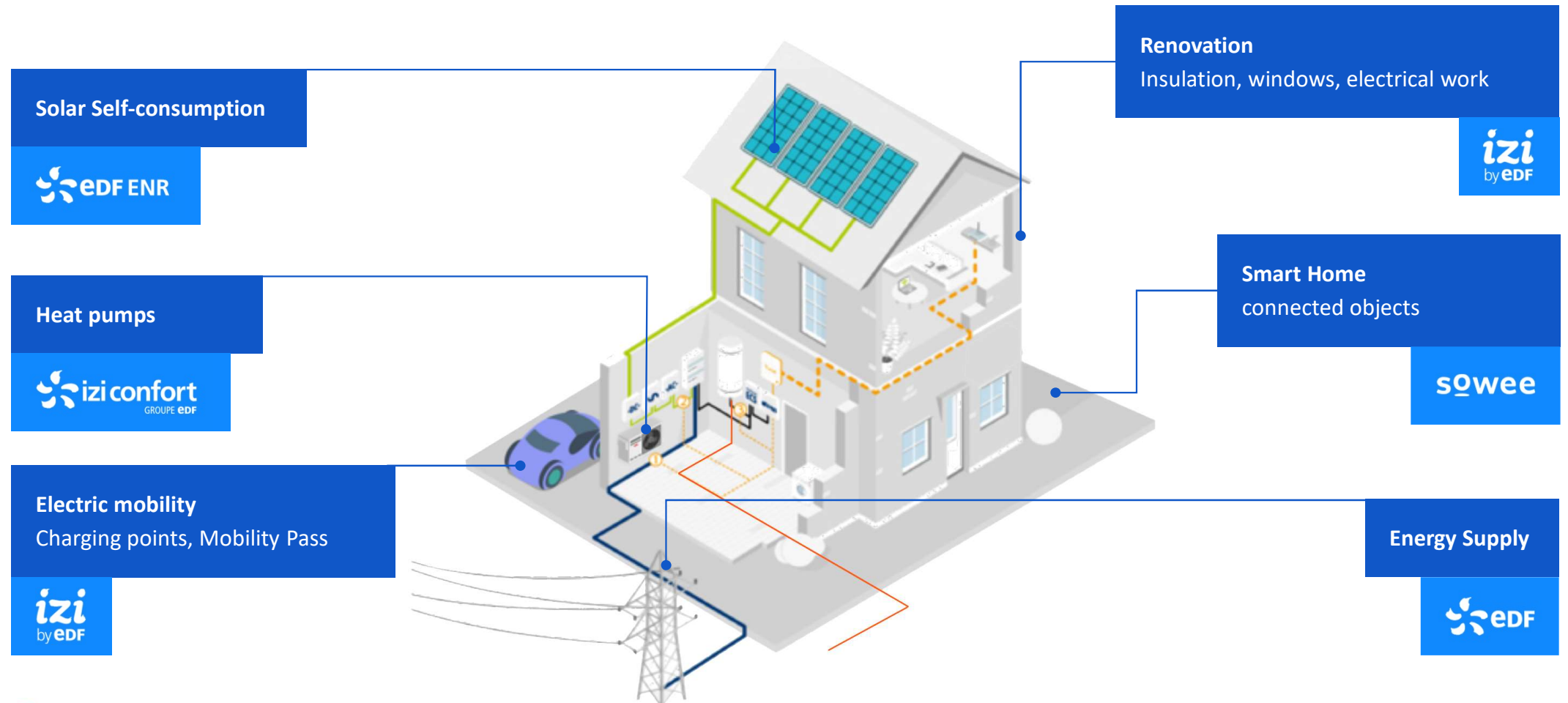
- Illustrating the employee's support of the Customers, Services & Territories division's strategy

#### Career fluidity

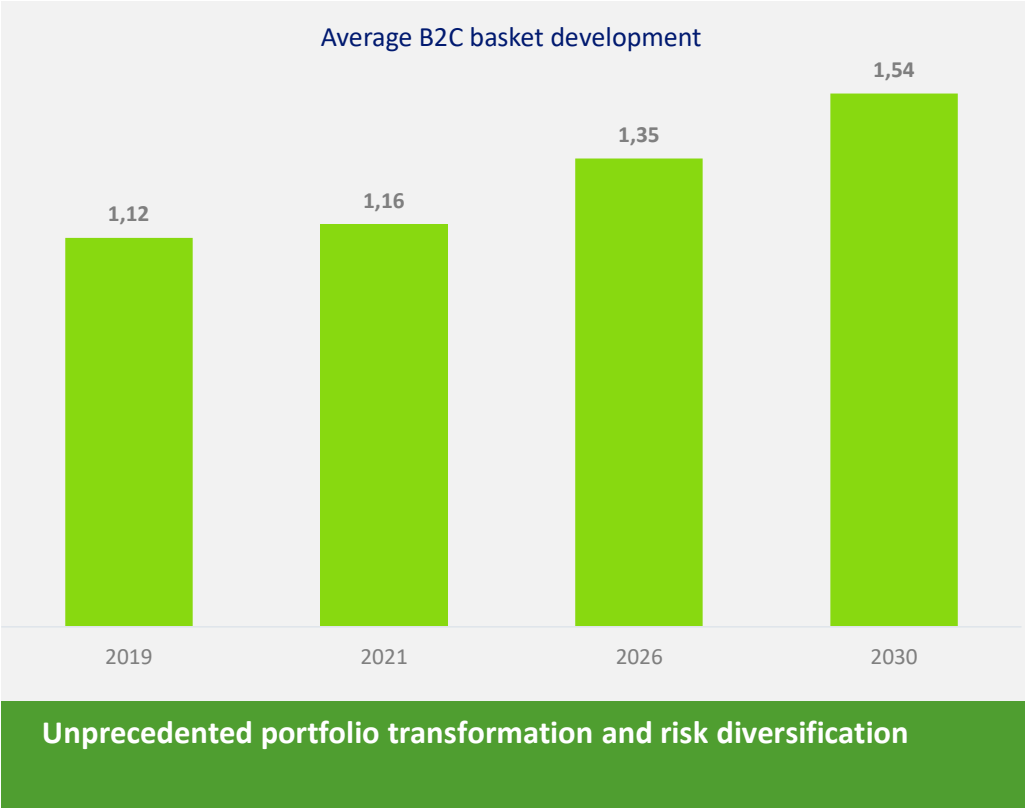
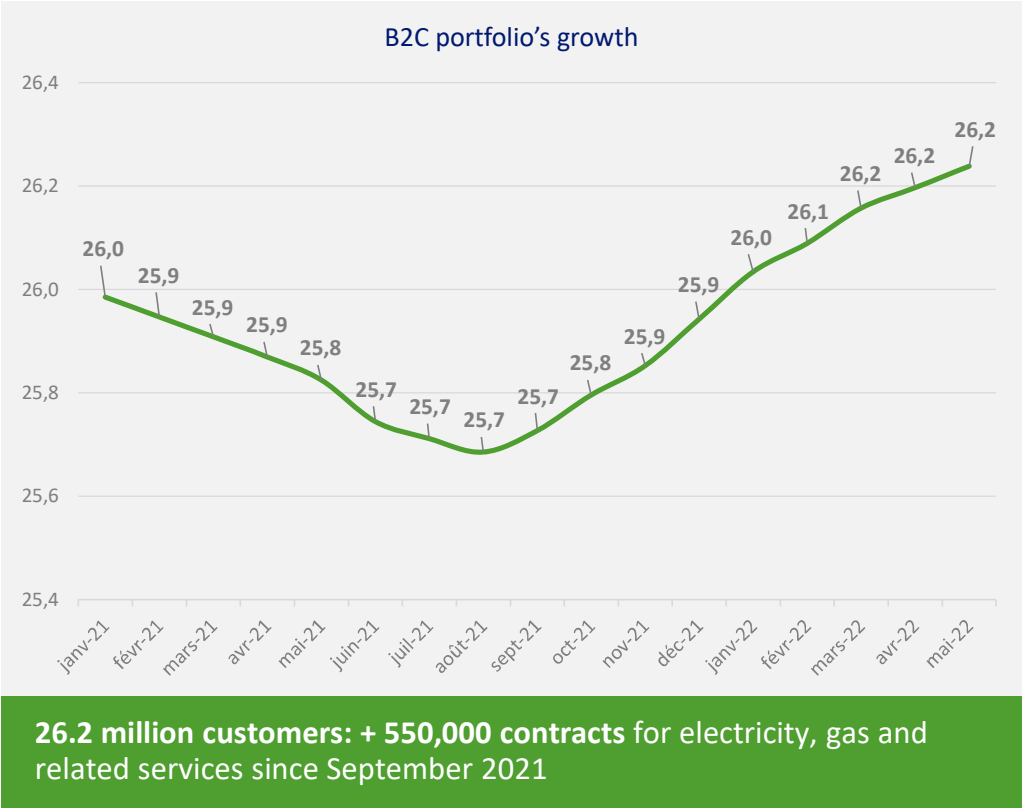
- Forward-looking skills management to face the growing activities' challenge


→ B2C: the commercial rebound

## The range of B2C offers of the Customers, Services & Territories division



# Contract portfolio's net growth





→ B2B: synergies  
in action



## Industry and agriculture

Accelerating our customers' carbon neutrality trajectory and supporting their long term competitiveness

### Constellium

#### Support for the Issoire site (Puy de Dôme) in the ISO 50 001 certification

- **162GW Cumac of Energy Savings Certificates** through the motorisation's optimisation of the industrial process
- Natural gas supplier for 900 GWh/year for 3 years
- **Development contract of 5000 kW of shaving capacity**

By  **EDF**

#### Creation of a public service heating network supplied by the recovery of the plant's waste heat to heat public and private buildings in the town of Issoire

- Investment: €10.6m
- 4900 tons of CO2 avoided per year

By  **dalkia**  
GROUPE EDF

#### Development of local commerce in the town of Issoire

- Development of a partnership with 34 traders
- 35% of the city's households are involved in the loyalty scheme

By  **proxity**  
Proxity est une filiale d'EDF



Private sector

## Supporting our customers' carbon neutrality

### Crédit Agricole

#### 100% green electricity supplier

- Framework contract 2022-2024 for an annual volume of 550GWh and 9600 sites
- Includes an energy monitoring and management service

By  **EDF**

#### Electric mobility

- 120 charging stations on the sites of the Crédit Agricole Regional Banks

By  **izivia**  
GROUPE EDF

#### Energy services

- Multi-technical contract on 3 sites in Ile de France - Campus Evergreen Montrouge, Campus SQY Park Saint Quentin en Yvelines, Amundi Pôle Montparnasse - and on one site in the Mediterranean region

By  **dalkia**  
GROUPE EDF

#### Solar self-consumption

- Solar self-consumption equipment on tertiary buildings

By  **EDF ENR**





Industry and agriculture

Accelerate our customers' carbon neutrality  
of our customers and support  
their long term competitiveness

Paper manufacturer Wepa  
Greenfield

**First industrial demonstration of a trans-critical heat pump**

- Turnkey implementation
- Operation and maintenance of the plant under a 5-year heat supply contract

**Heat production**

- 4.6 GWh per year

**Energy saving**

- 26 GWh Cumac
- 1,000 tonnes of CO2 avoided per year

By  **dalkia**  
GROUPE EDF

Technology patented by EDF R&D for very high temperature trans-critical heat pumps

By  **EDF**



Private tertiary and health

## Supporting our customers' carbon neutrality

### Futuroscope

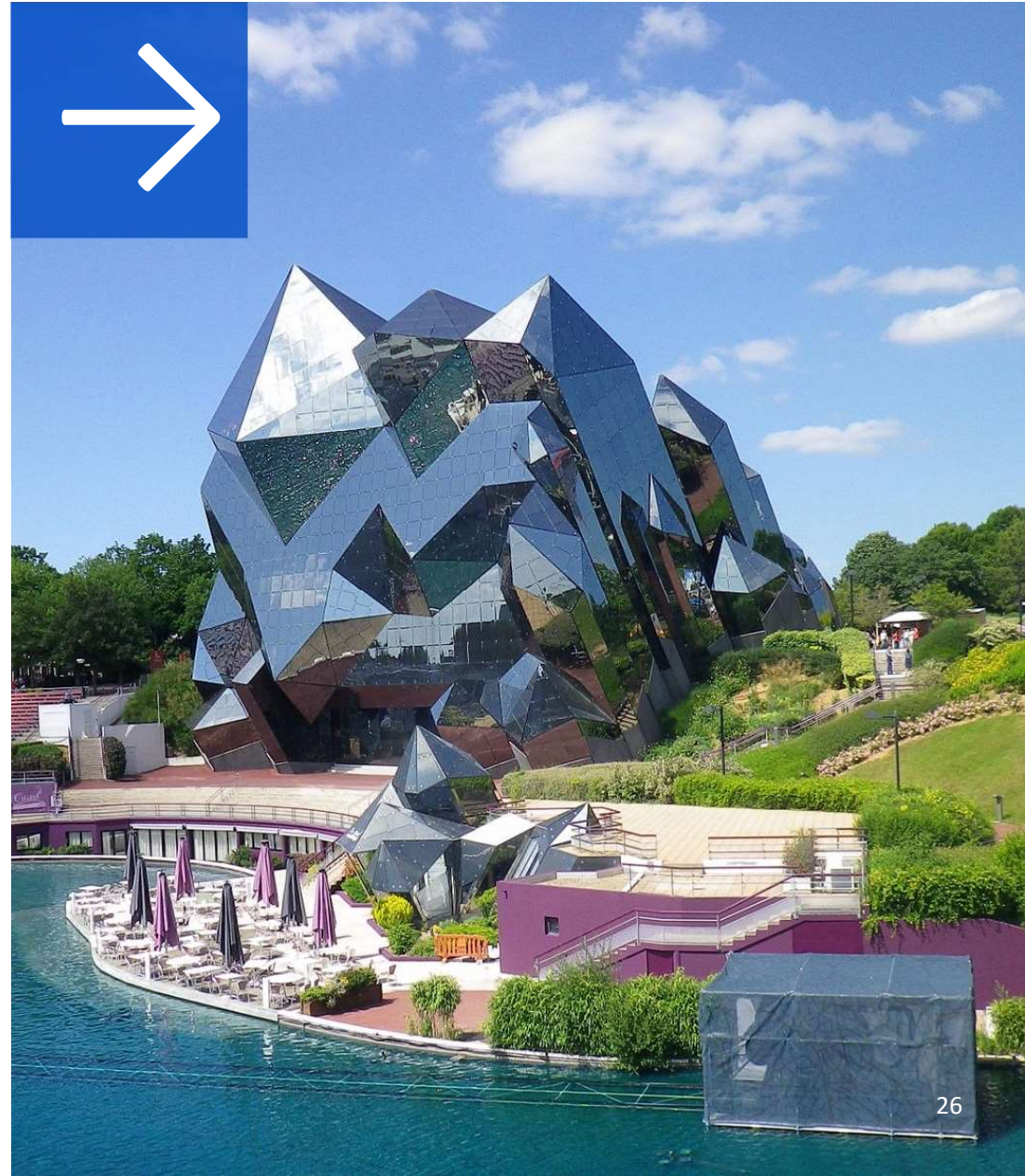
#### Energy Supply contract

- Green electricity supply contract until the end of 2023: annual consumption of 15 GWh of 100% green electricity;
- Gas supply contract, renewed until 2024 for 23 GWh/year

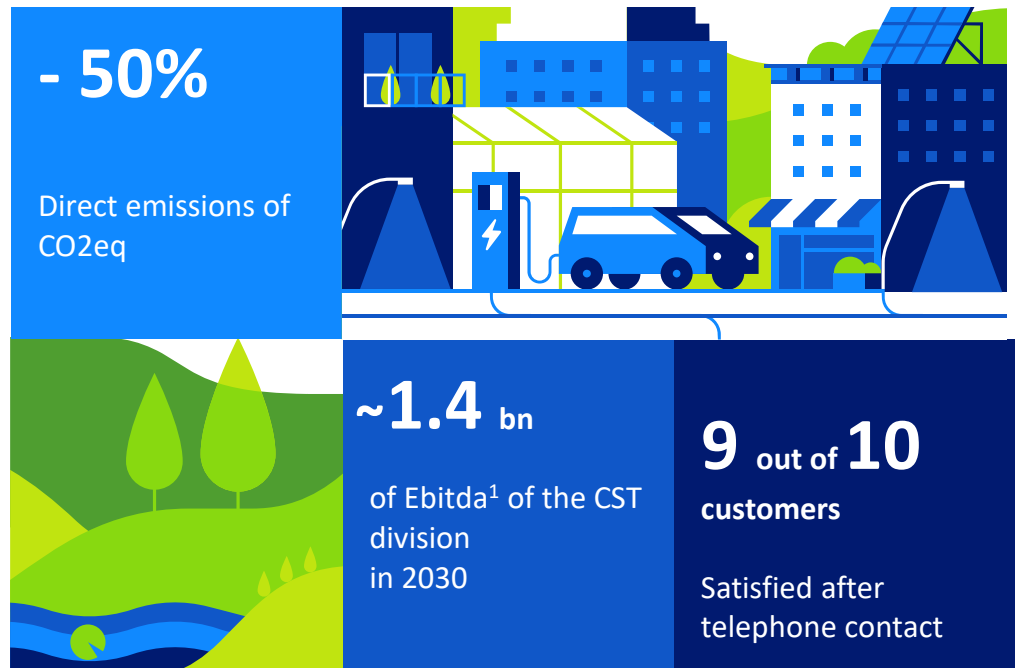
#### Energy Services Contract

- The Park's multi-technical operating contract, with 60 employees present on site and through a contract that began in 2002 and was recently renewed until 2036

By



## Decarbonization, a lever for creating value for our customers and for the Customers, Services & Territories division



1 - Energy efficiency

2 - Decarbonization of uses

3 - Local production and distribution of renewable energy

4 - Responsible energy supplier





Merci