

value

value

Shaping the Future of the Energy Industry

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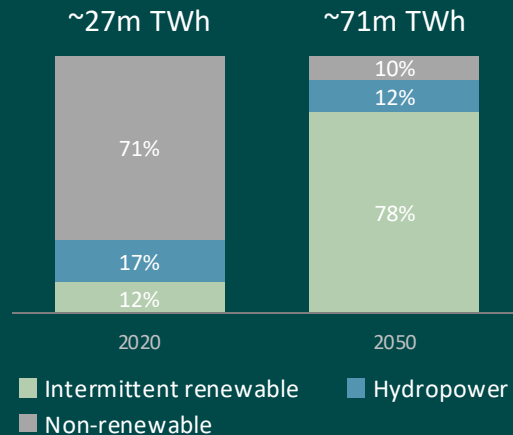


What does the shift to net zero mean for our energy system?

To reach its 2050 net zero target the EU will require ~\$1.6bn of investment every single year and we are seeing...

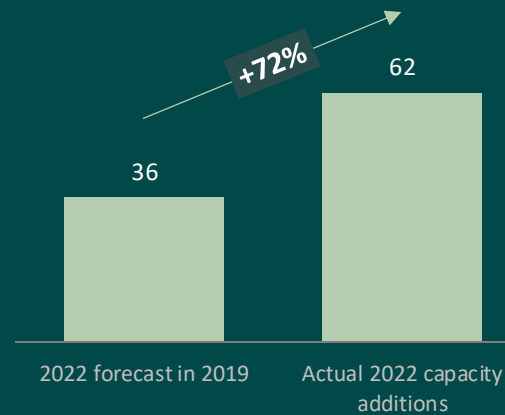
Intermittent energy production taking-off...

Global electricity generation by source in IEA Net Zero Emission by 2050 scenario



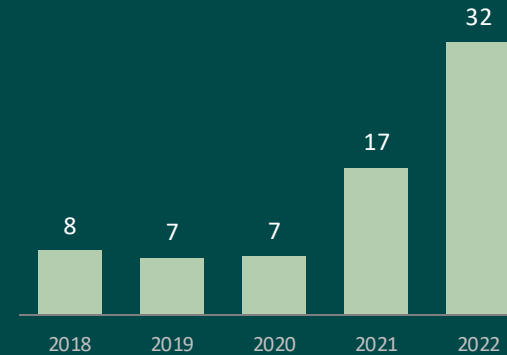
... with build-out continually outperforming expectations

Annual addition of renewables in GW



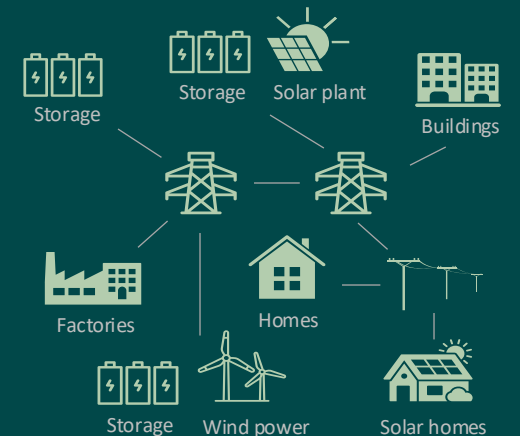
Higher price volatility persisting

Difference between peak and base price in German intraday market (Euro/MWh)



Centralised power system is giving way to a distributed one

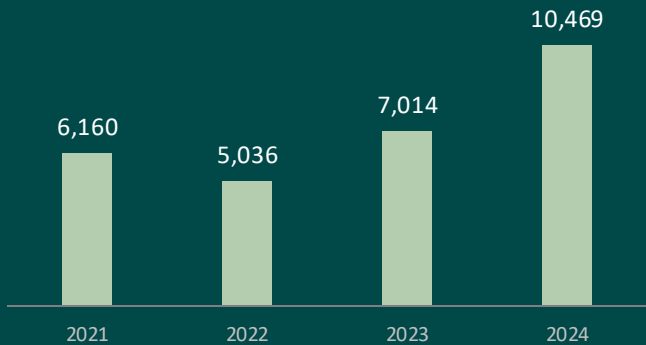
Illustration of future distributed power system



We see opportunities but also challenges ahead (1/2)

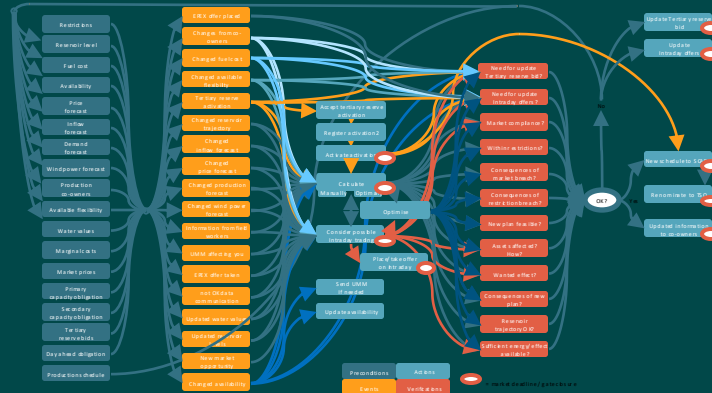
New market opportunities and increasing volumes traded...

Volumes traded on EEX and Nord Pool, TWH
+49% from 2023 to 2024 alone



... but ever-more complex optimisation problems ...

Typical optimisation process



... and meaningful operational complexity

Go-live of automated Nordic mFRR energy activation market is postponed

The four Nordic TSO's have today decided to postpone the go-live of the automated Nordic mFRR energy activation market (mFRR EAM) to early 2025.

The results of this study indicate that the addition of groundwater to the local water supply is not only a necessary element in the development of a sustainable water supply system, but also a necessary element in the development of a sustainable economy. The results of this study indicate that the addition of groundwater to the local water supply is not only a necessary element in the development of a sustainable water supply system, but also a necessary element in the development of a sustainable economy.

After careful consideration
EPEX SPOT will vote against
15-minute Day-Ahead go-live
in light of serious
operational concerns

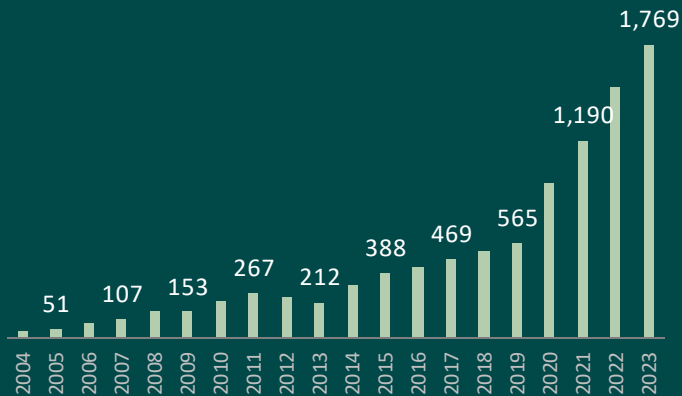
Exchange requests clarity for Market Participants and suggests revised go-live date

Amsterdam, Berlin, Bern, Brussels, London, Paris, Vienna, 17 April 2025. In the coming months, the European power market will witness one of the most profound changes of the post-war era: the introduction of 15-minute Market Time (MKT) by 2026.

We see opportunities but also challenges ahead (2/2)

Trillions of dollars deployed, or to be deployed...

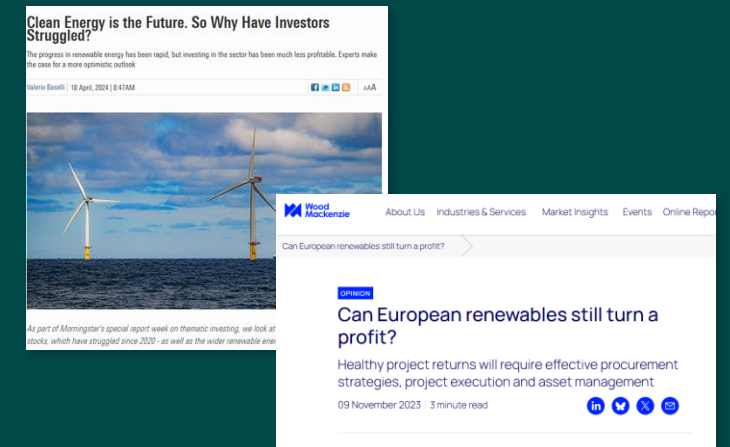
Global energy transition investment, \$Bn



... with high stress on Europe's biggest machine that enables it all...



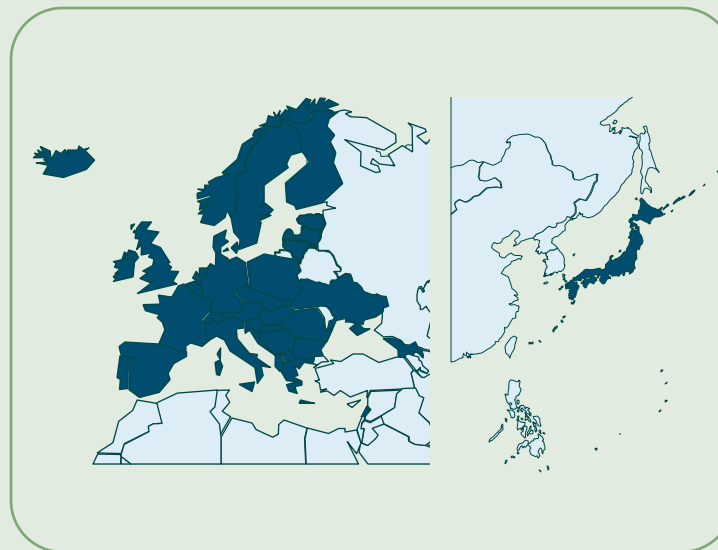
... but limited visibility into performance



Value powers the green transition through software and services critical for a cleaner and more profitable future

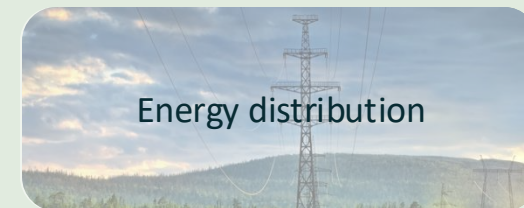
- Leading provider of mission-critical software and services for the energy industry
- Unmatched scale in the industry with pan-European presence and global reach
- Comprehensive end-to-end platform
- 50+ years experience in green-tech and long track record from intermittent renewable energy sources
- Trusted by 9 of the 10 largest European power producers, with a long-tail of loyal customers (<2% churn)

Strong geographical footprint across Europe and Japan



	Established 2020
	Employees 700+
	Customers 2,300+
	Offices 30+
	Customers in 40+ countries

Core markets



Our portfolio of mission-critical software spans the energy value chain to help our customers gain value from volatility

Insight

Most widely used enterprise price forecast in Europe; 40% of all members on European power exchange buy forecasts from Volve Insight

Energy Software

Automating the operation of both physical and virtual power trading operations to maximise efficiency and revenue

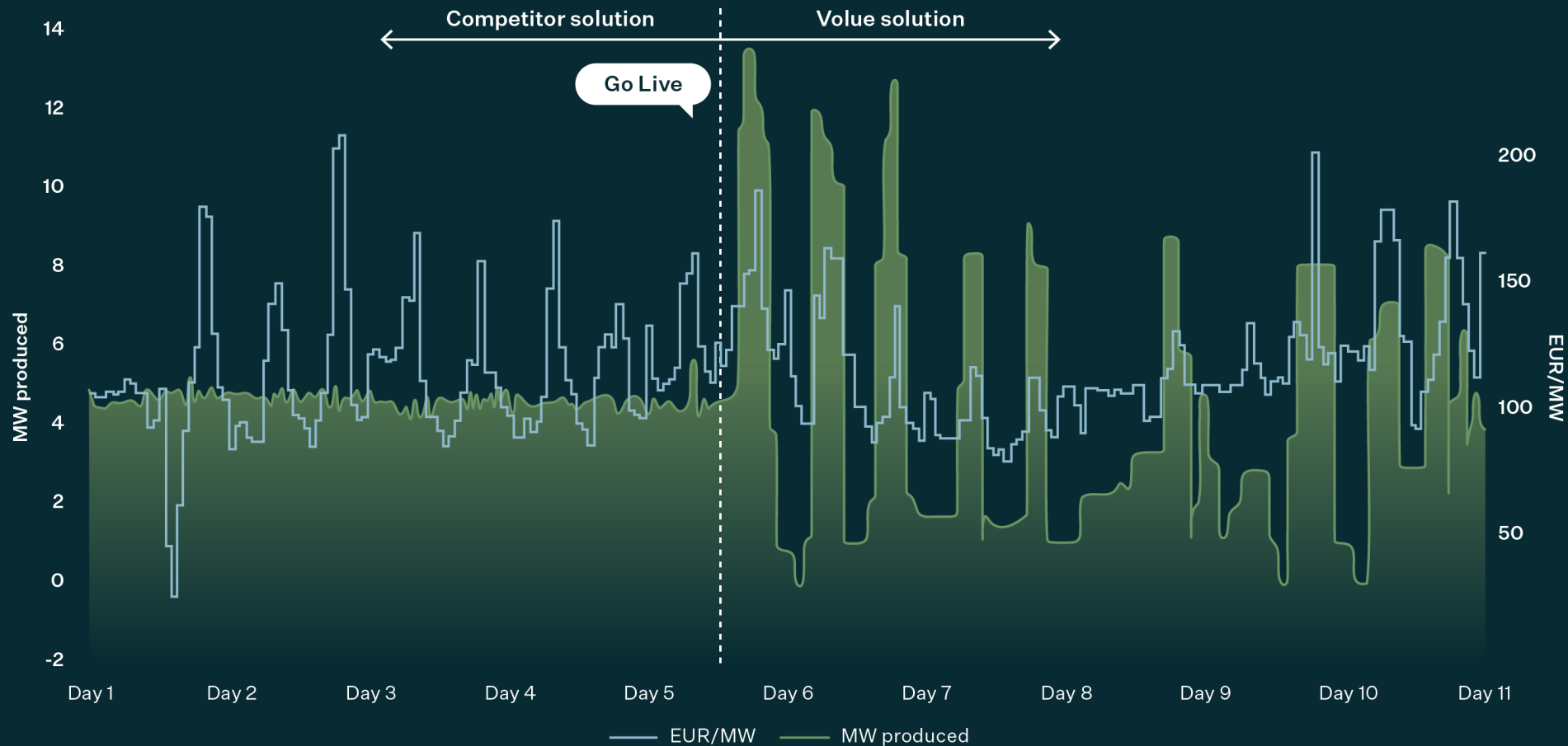
Energy Market Services

Outsourced back and mid-office operations for independent power producers

Power Grid

Leading system of record for the Scandinavian grid, now developing GIS-based technologies for the pan-European grid focused on more flexible grid planning and interconnection management

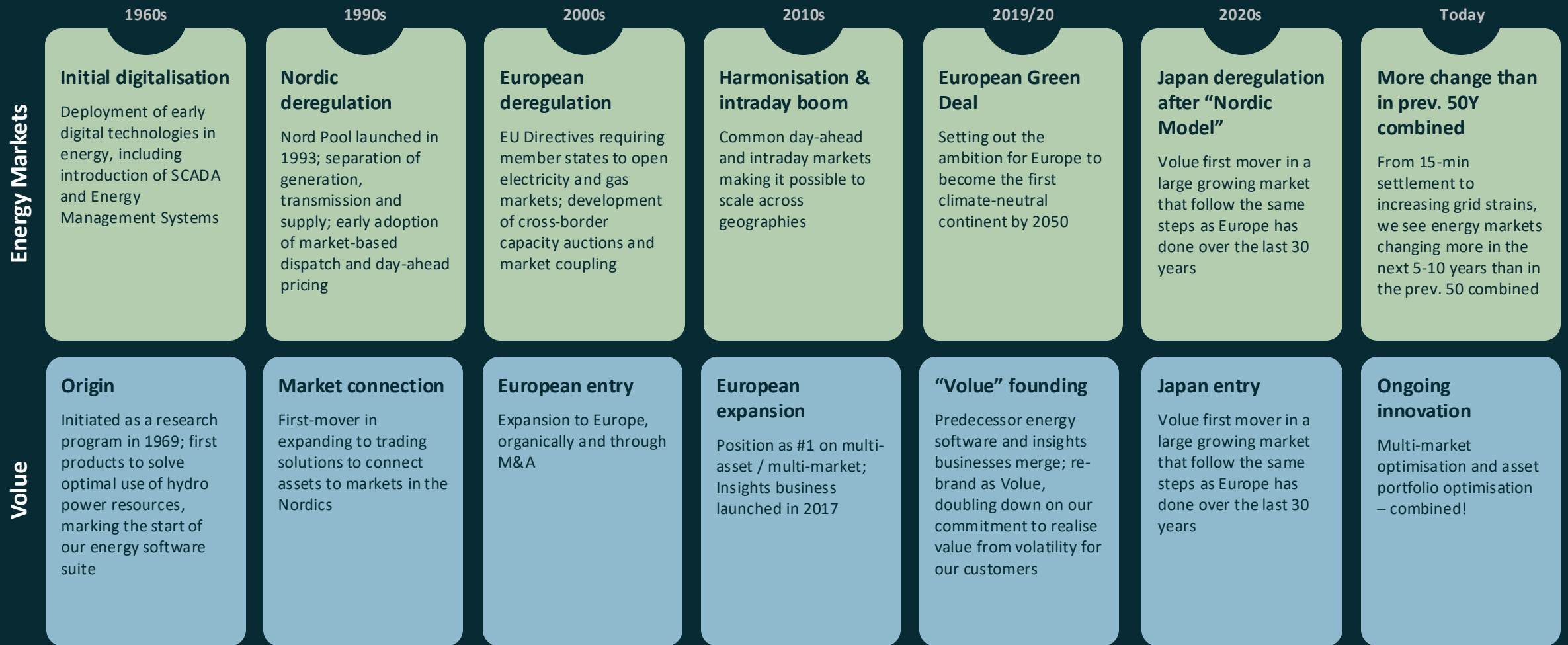
Case study: Value Energy Solutions



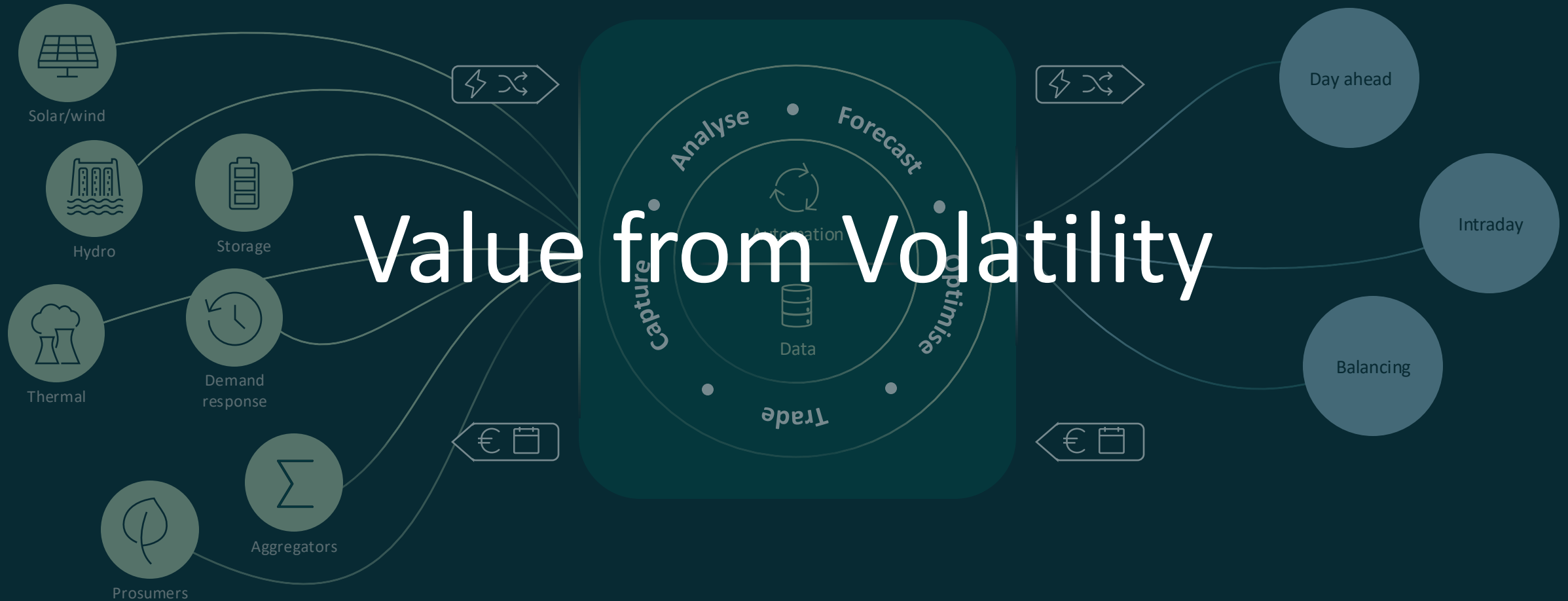
Large & complex customer portfolio

- **26GW** installed capacity
- **42TWh** production
- **500** optimisation runs / day

We've been supporting the European power industry for over half a century



So where to next?



And finally... Thanks to you, our customers and partners

Insight



Energy Software



Energy Market Services



Power Grid

