

Bridgeall Technology Overview

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Oct 2005



- Company Background
- The Market
- Our Products
- Sales
- How did we get here?
- Challenges & Opportunities

Company Background

- Our purpose:
 - To improve our customers business by delivering outstanding software
- Focus on UK Gas Market
- Delivering an integrated product suite for Suppliers and Independent Transporters
- Mission
 - By end-2005 to establish Bridgeall as a first-choice supplier of energy systems with 4 million UK energy customers processed through our systems

- UK Utility Market
 - Gas Producers (e.g. BP)
 - Gas Shippers (e.g. ScottishPower)
 - Gas Suppliers (e.g. ScottishPower, SSE)
 - Gas Transporters (e.g. Transco, GTC)
 - Meter Reading Agencies
 - Meter Asset Managers
- Ofgem – government agency
 - Promote competition
- EnergyWatch
 - Monitor consumer complaints

Industry Processes

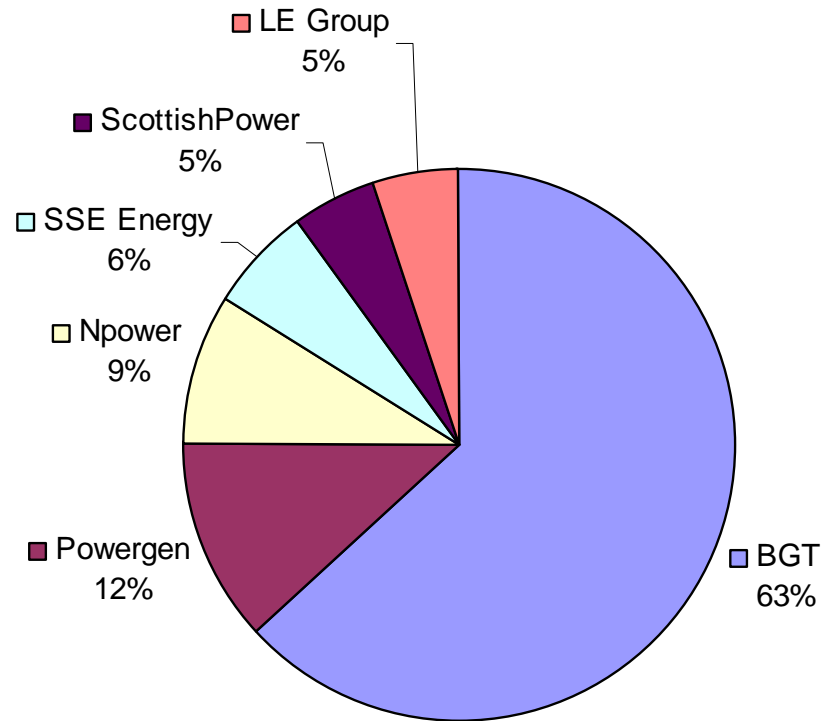
- Some examples
 - Customer Transfers
 - From old to new supplier
 - Manage meter readings
 - Manage metering work
 - Installs, removals, exchanges, etc
- All require Supplier/Shipper to Transporter communication
 - Underpinned with ‘standard’ industry formats
 - New formats/processes arise
 - Existing formats/processes change (and therefore systems)

Player Counts (Sep 2003)

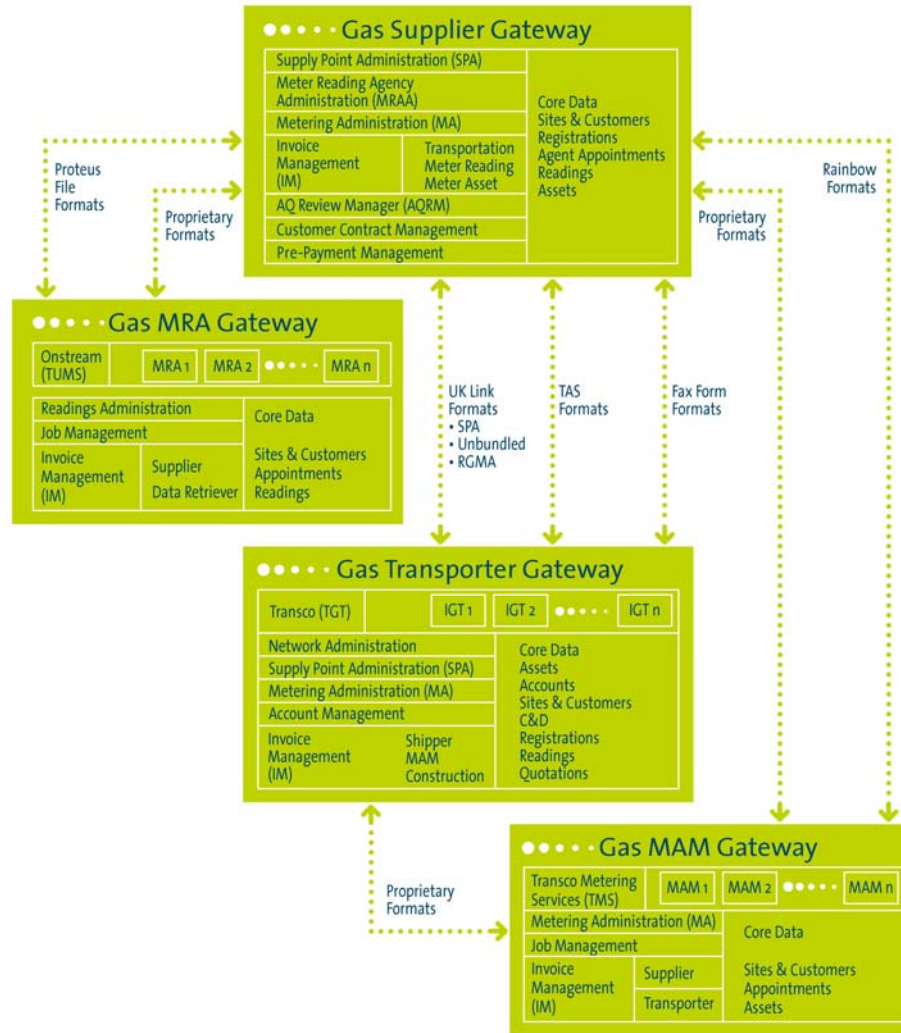
- Transporters 13
- Shippers 80
- Suppliers 71
 - Domestic 29
 - Business 71

Supplier Market Share

Domestic Gas Market Share (Mar 2003)



Integrated Gas Software



- Gas Supplier Gateway
 - Supply Point Administration
 - Meter Reading Agency Admin
 - Metering Administration
- Integrated
- Multi-network
 - I.e. Transco + 12 Independent Gas Transporters
- Capability to create and maintain file/record formats
 - Rapidly
 - Safely

- ScottishPower
- Integrated Product Suite
- Rapid implementation
- First-class support during recent (challenging) industry de-regulation

Sales Overview

- Off to a flyer....
 - Initial ScottishPower licence agreement within 3 months of startup
 - Further licence agreements for additional products
- Currently bidding at SP for further product licence agreements
- Current targets
 - Other big 5 suppliers (Centrica, Edf, PowerGen, Npower, SSE)
 - New Suppliers
 - IGT's

How did we get here?

- 5 people
 - Stephen Beer
 - ex-Oracle Product Line Dev. Mgr
 - ex-contract Project Manager within Utilities industry
 - started and ran online booking engine company
 - Waseem Anwar
 - ex-Oracle Consultant
 - ex-contract Developer within Utilities industry
 - + Business Analyst, System Architect, Java Developer

Market Gap

- Integrated systems
- Improve efficiencies
- Reduce EnergyWatch complaints

Physical Environment

- Innovation Centre ideal for start-ups
 - Technical Infrastructure
 - Meeting/presentation facilities
 - Business Support
- Are you listening Michael McGuinness
 - Worth a rent reduction surely !!!

Challenges & Opportunities

- Corporate sales
 - How do you get in there?
 - Sales cycle time appears to be long
 - How do they actually come to a decision?
- Generating revenue between the peaks
 - Consultancy

Opportunities

- Markets
 - UK
 - Ireland
 - Europe
- Outlook is Positive
 - We know the business
 - We have the products to make a Supplier very efficient
 - There are fragmented systems architecture out there to be improved

What do we need?

- Money - no
- Time - no
- Technology - no

- Sales – too right!!