



GE Power

20% in 2020 – Unlocking ASEAN's Energy Efficiency Potential

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The NEW GE Power

GAS POWER SYSTEMS



POWER SERVICES



STEAM POWER SYSTEMS



GRID SOLUTIONS



GE HITACHI NUCLEAR ENERGY



POWER DIGITAL SOLUTIONS



POWER CONVERSION



AUTOMATION & CONTROLS



BEING DIVESTED

INDUSTRIAL SOLUTIONS



Target close date 4Q

WATER & PROCESS TECHNOLOGIES

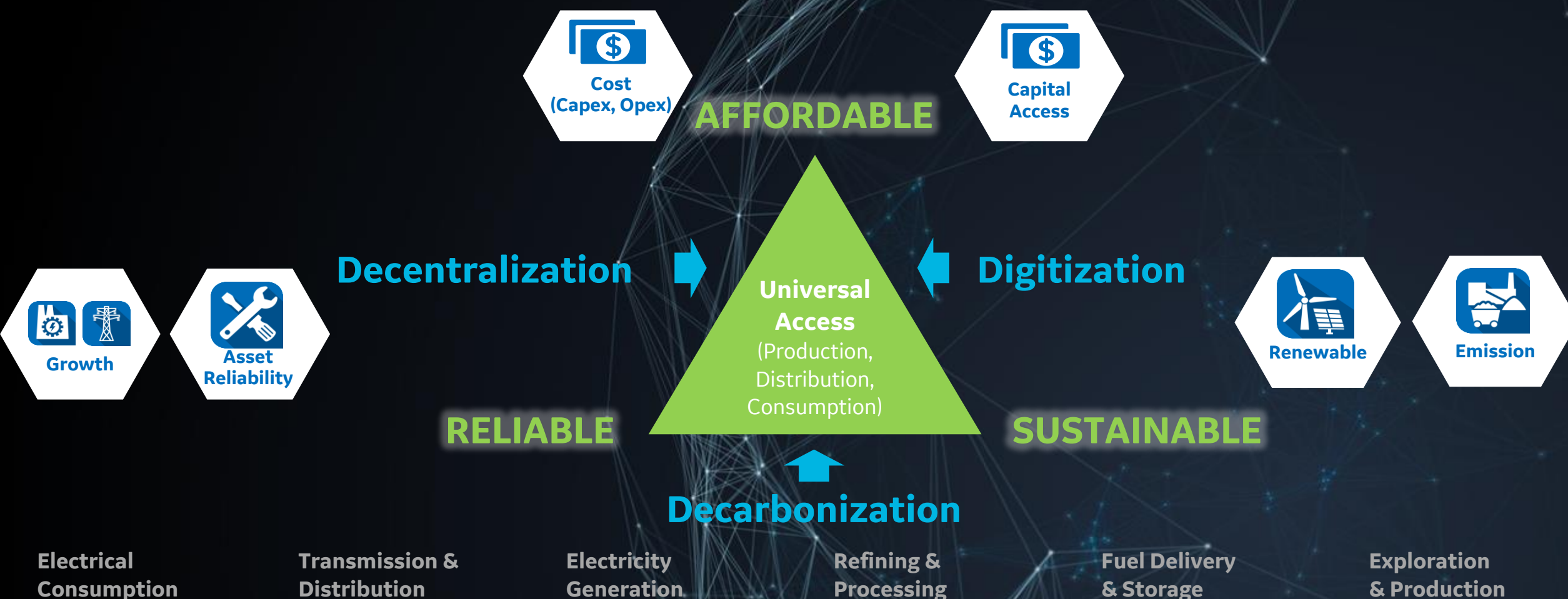


Target close date 3Q

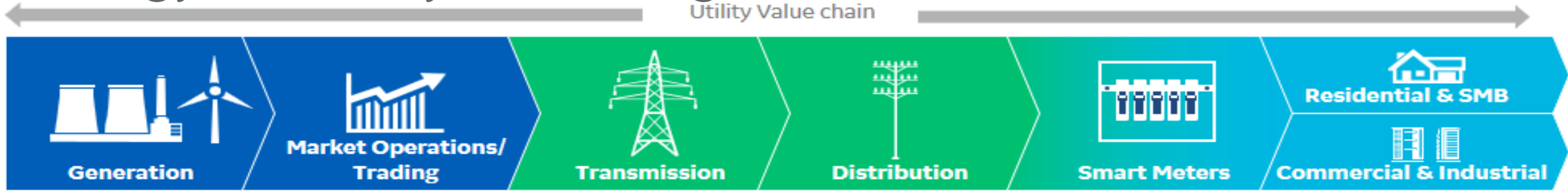
- Key locations in the US, Switzerland and France
- Expansive global reach ... >150 countries
- Powering more than 1/3 of the world's power
- ~1,600 GW installed capacity
- >750,000 installed assets
- Part of 90% of the world's power grids worldwide



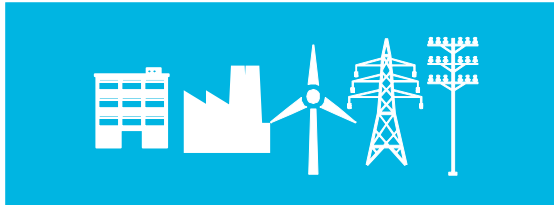
Energy Ecosystem Goals



Energy Industry Challenges



NEW BUSINESS & OPERATING MODELS



Impact of distributed & variable energy sources changes the value chain ecosystem, its players & models.

REGULATORY PRESSURE



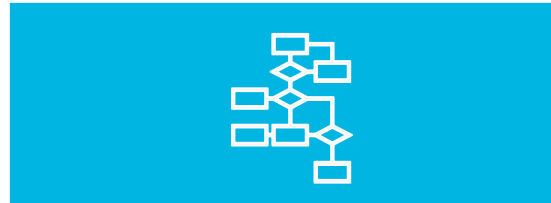
Shifting regulatory models require business agility enabled by insight-driven decisions.

EMPOWERED CUSTOMERS



Customers are empowered on their terms (service, cost, sustainability).

CYBER SECURITY



Balancing adequate generation capacity/fuel supply, while mitigating infrastructure security risks

DIGITAL DISRUPTION



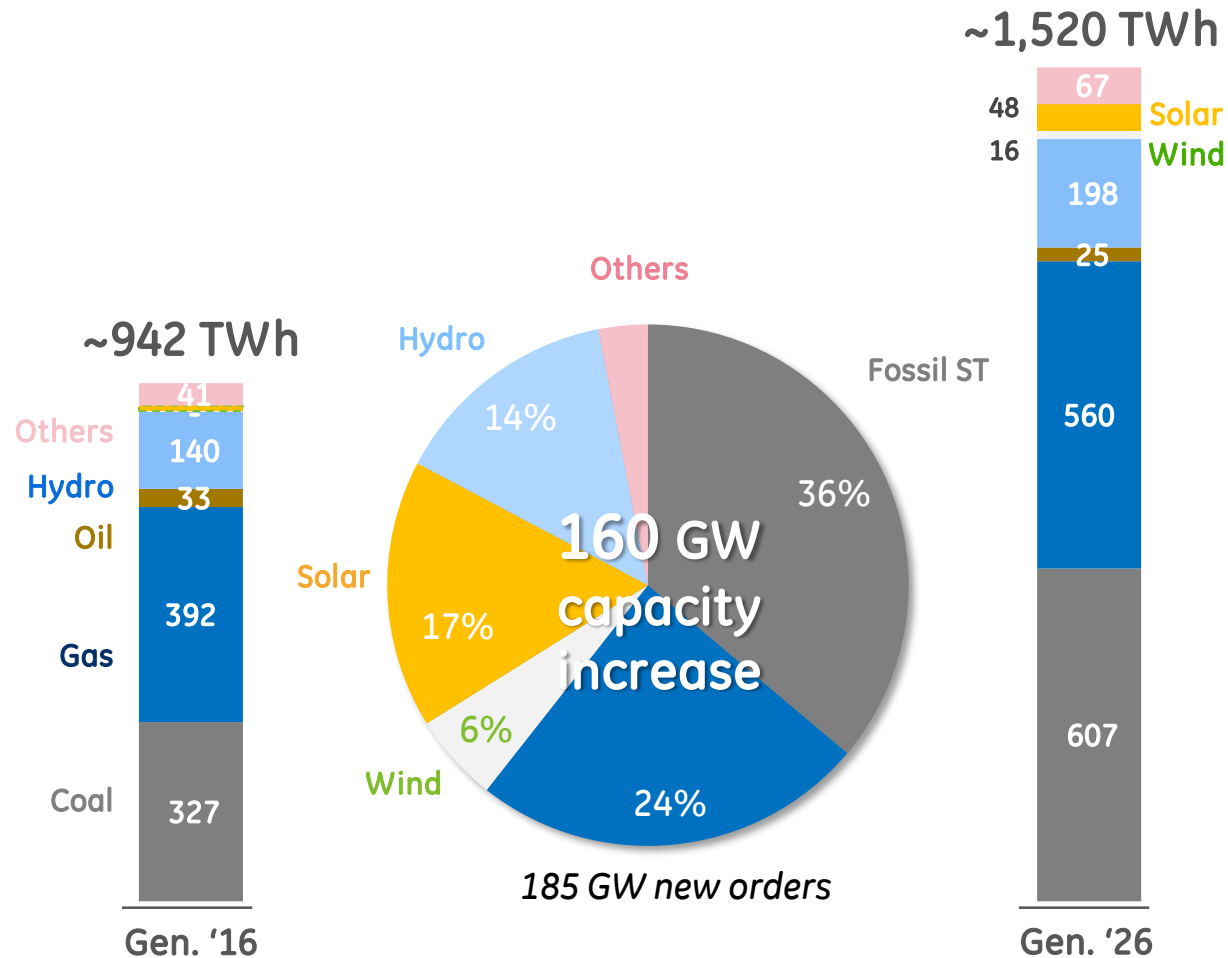
Deployment of new infrastructures based on digital (e.g., meters).

WORKFORCE OF THE FUTURE



Changing employee expectations for use of digital to make jobs easier and more enriching.

ASEAN power generation outlook



OPPORTUNITIES

Continued power demand

5%+ CAGR over the next decade & 60+% increase in generation

Lower LNG price

Supporting gas in the region, increasingly dependent on LNG

Coal PG growth

Overtakes gas as the largest source by 2020

CHALLENGES

Project delays

Planned vs. actual execution of projects

Lack of stable & predictable environment

Risks associated with projects vs. those in advanced countries

Meeting COP21 target

Ambitious targets set vs. need to power the countries

Strong demand growth & PG capacity growth continues in ASEAN

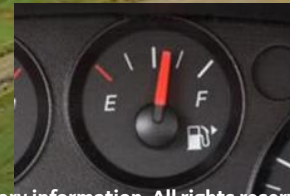
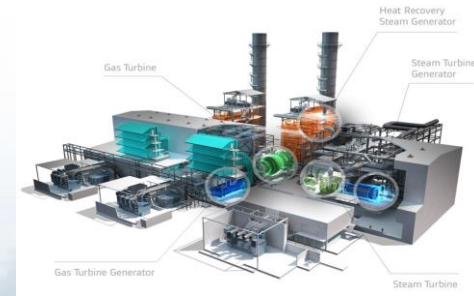
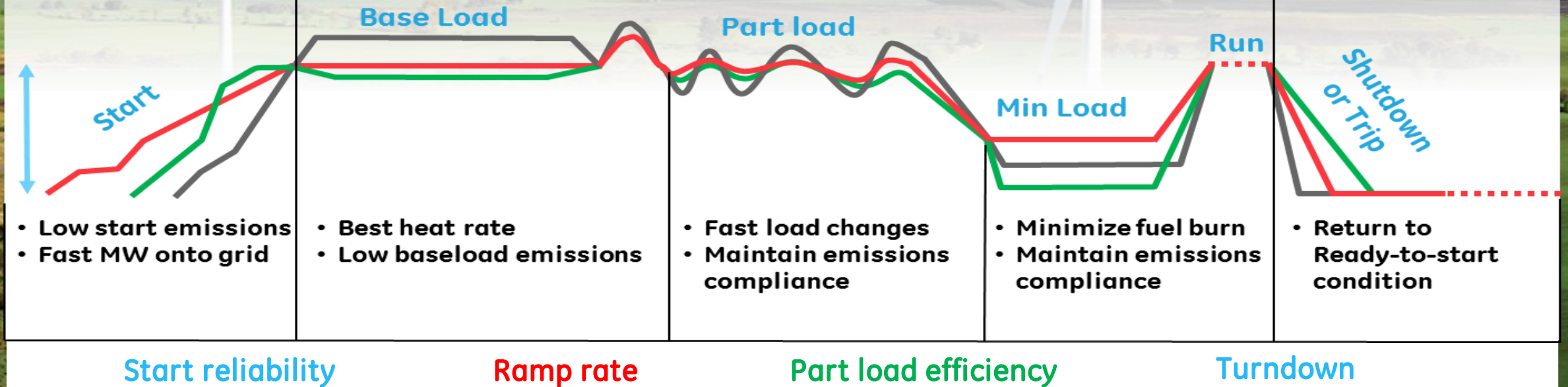


Combined cycle flexible profile

Industry changes

- Role for natural gas generation
- Evolving emission requirements
- Deployment of renewables
- Developing industry structures for variable power
- Regional diversity

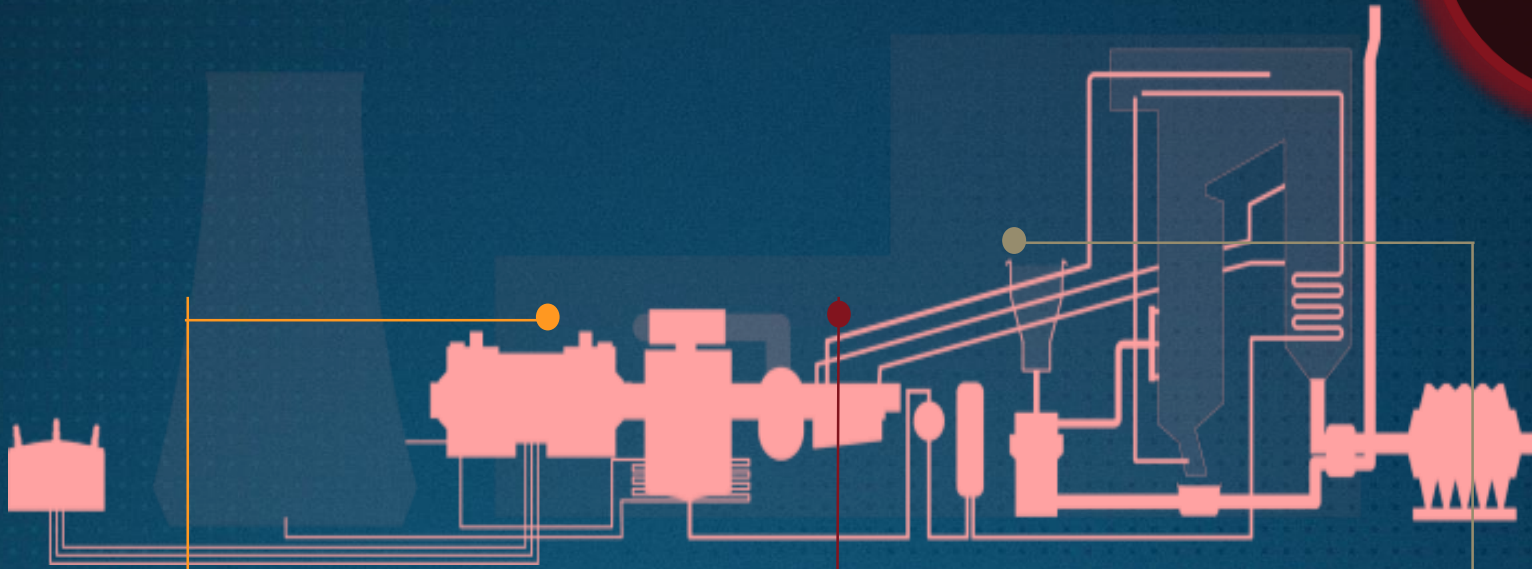
Volatility of grid capacity



Smarter Cleaner Steam Power

*Steam Power technology has accelerated with the development of **leading efficiency, lower emission** technologies to deliver more value to customers.*

Driving towards
 $\geq 50\%$
efficiency



Technology Advancements

1½ % points more efficient
& 3% lower emissions
compared to today's best



Digital Capabilities

Delivers up to
1 ½% more power over
the life of a plant



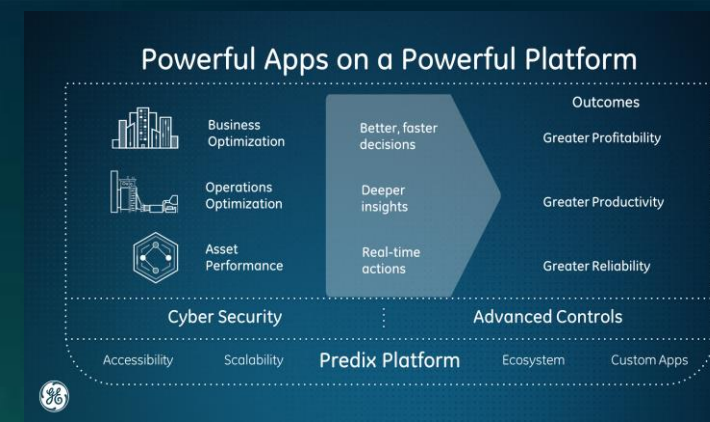
Environmental Controls

Able to lower emissions by 70%
more than the world's most
stringent emission standards



Digital Power Plant

Connecting Data & People in the Organization



Thank You

