
Easy ◆◆◆ Affordable ◆◆◆ Flexible

Energy Efficiency Financing

*Brought to you by
The Carbon Trust and Siemens Financial Services*

TODAY'S AGENDA

1. WELCOME AND INTRODUCTIONS

2. ABOUT SIEMENS FINANCIAL SERVICES

3. OVERVIEW OF THE NEW ENERGY EFFICIENCY FINANCING SCHEME

4. SELLING ENERGY EFFICIENT FINANCING - SUPPLIER & CUSTOMER FEATURES AND BENEFITS

5. INTRODUCTION TO PROCESSES AND PAPERWORK

6. QUESTIONS AND ANSWERS SESSION

7. WRAP UP

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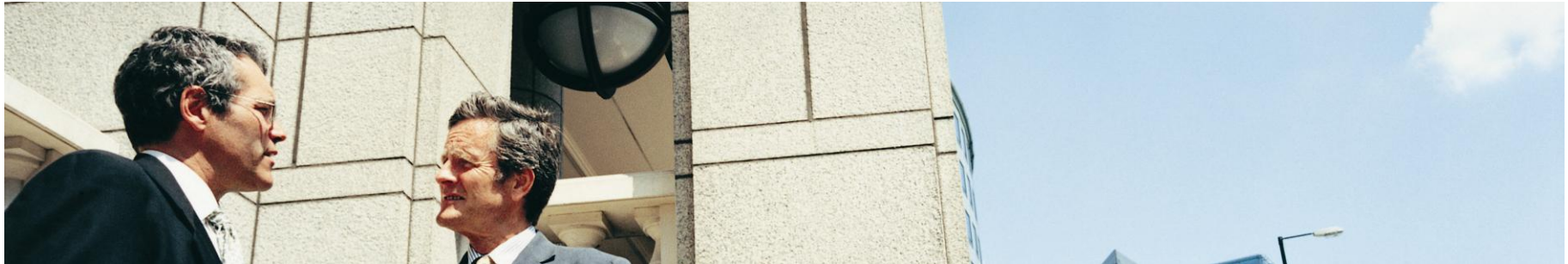
FOR MORE INFORMATION ABOUT THE BENEFITS OF ENERGY EFFICIENCY FINANCING, PLEASE REFER YOUR SUPPLIER PACK

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WELCOME & INTRODUCTIONS

1. *EWAN ADDISON - ACCOUNT DEVELOPMENT MANAGER* *SIEMENS FINANCIAL SERVICES*



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SIEMENS FINANCIAL SERVICES PART OF SIEMENS

Sectors

Industry

- Drive technologies
- Industry automation
- Building technologies
- Mobility
- Lighting (OSRAM)
- Industry solutions



Energy

- Fossil power generation
- Renewable energy
- Oil & gas
- Energy service
- Power transmission
- Power distribution



Healthcare

- Imaging & IT
- Workflow & solutions
- Diagnostics



Cross-Sector business

Siemens Financial Services

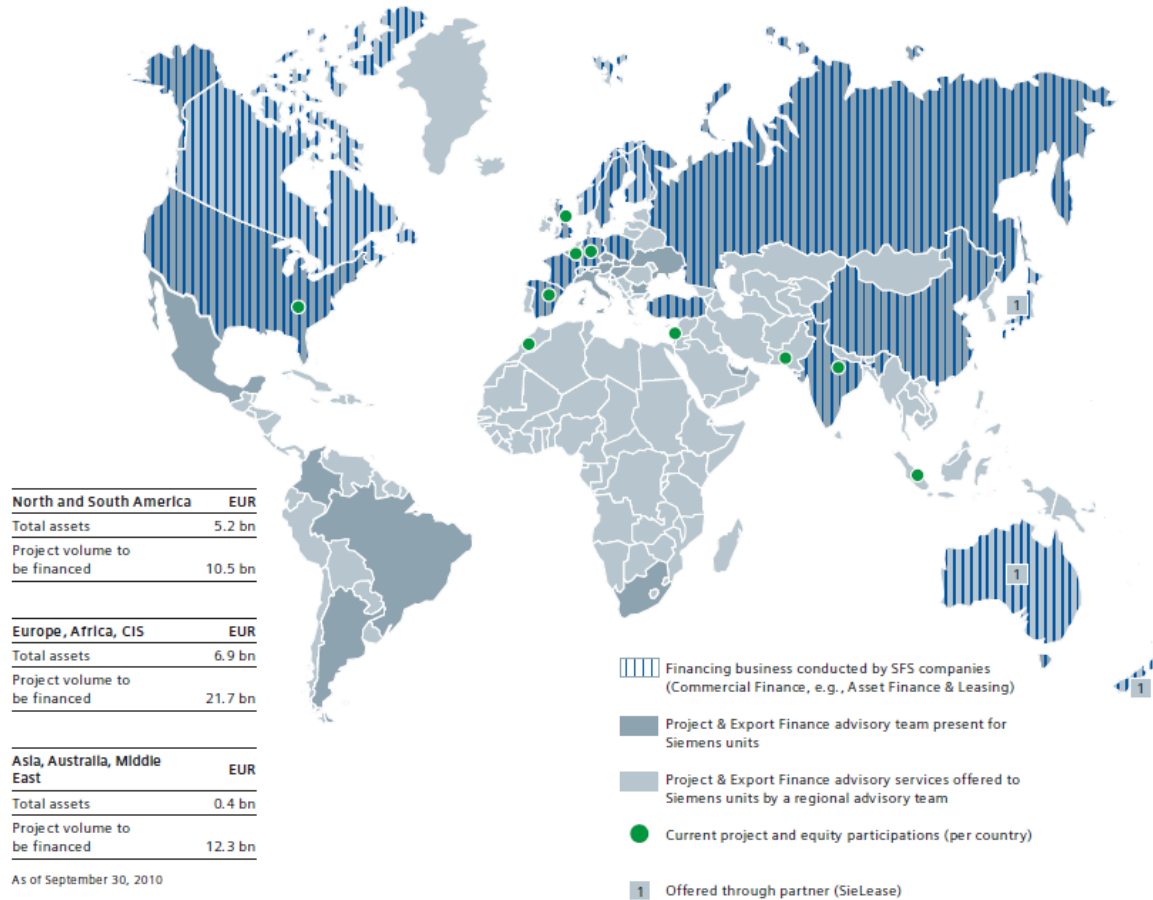
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ABOUT SIEMENS FINANCIAL SERVICES A STABLE INTERNATIONAL GROUP



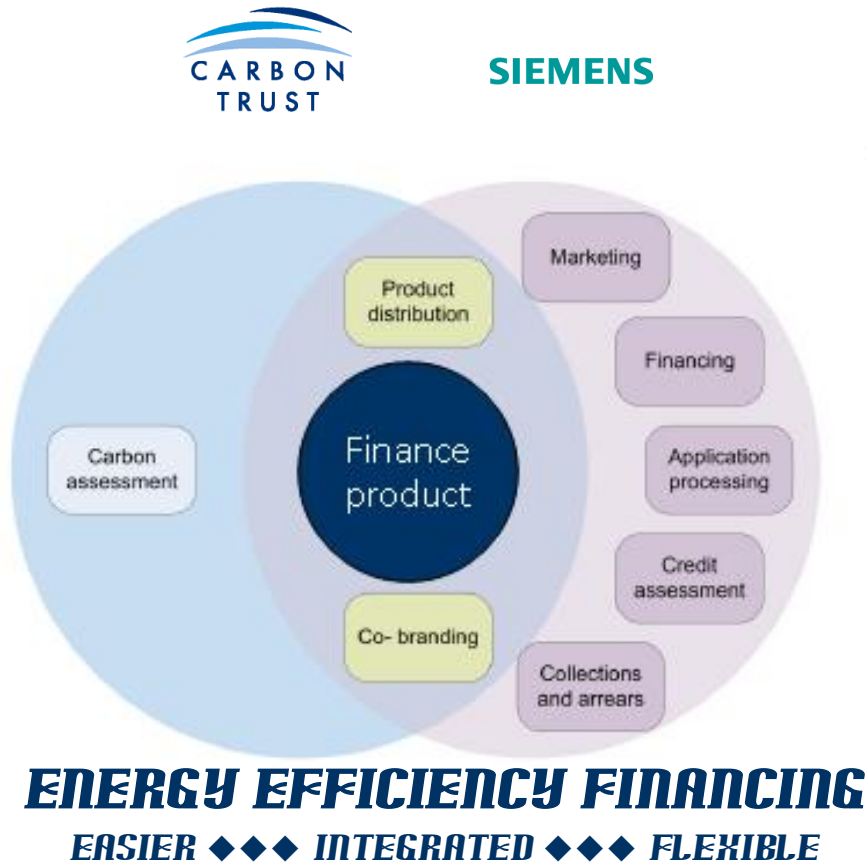
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OVERVIEW OF THE NEW ENERGY EFFICIENCY FINANCING SCHEME



- 1. CUSTOMER ENERGY SAVING ASSESSMENT REMAINS WITH CARBON TRUST**
- 2. SIEMENS AS SINGLE POINT OF CONTACT FOR APPLICATION PROCESSING, CREDIT ASSESSMENT, FINANCING AND CUSTOMER PORTFOLIO MANAGEMENT**
- 3. CO BRANDING AND PRODUCT DISTRIBUTION - VIA WEBSITE**

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INTRODUCTION TO NEW SCHEME EXECUTIVE SUMMARY

ENERGY EFFICIENCY FINANCING THROUGH CARBON TRUST AND SIEMENS

- **FINANCE OPTIONS INCLUDING LEASE**
- **£1,000 UPWARDS**
- **FLEXIBLE PAYMENT TERMS**
- **PRIVATE AND PUBLIC SECTOR FINANCE**
- **SIEMENS FUNDED**
- **PAYMENTS TO BE FUNDED FROM ENERGY SAVINGS**
- **CONSISTENCY OF SERVICE AND PRODUCT**

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THE FINANCIAL SOLUTIONS

- ***LEASE***
- ***LEASE PURCHASE***
- ***HIRE PURCHASE***



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SELLING THE ENERGY EFFICIENCY FINANCING SCHEME SUPPLIER BENEFITS

**DESIGNED TO MAKE SELLING EASIER - AN
ALTERNATIVE TO PURCHASE**

AN EASIER CLOSE - AFFORDABLE OPTIONS

SOLUTIONS (NOT 'BUDGET LIMIT') SELLING

FAST CREDIT DECISIONS - MAJORITY < 24HRS

**IMPROVED CASHFLOW - PAYMENT DIRECT & FAST
CUSTOMER BASE CONTROL - FOR FUTURE
OPPORTUNITIES**

**ESA - INDEPENDENT ENERGY SAVING REPORT
ONLINE ACCESS TO MANAGE CUSTOMER FINANCE
BASE - SIEMART**

**WIDER SCOPE OF OPPORTUNITIES - INCLUDING
RENEWABLES**

BROADER PRODUCT OPTIONS

**DEPENDABILITY OF OFFERING - 3 YEAR
ARRANGEMENT**



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SELLING THE ENERGY EFFICIENCY FINANCING SCHEME CUSTOMER BENEFITS

AFFORDABLE, ENERGY EFFICIENCY NOW!

CONVENIENT AND FAST

FLEXIBLE, TAILORED TERMS

EASIER BUDGETING

LEAVES EXISTING CREDIT LINES INTACT

INDEPENDENT ENERGY SAVING ASSESSMENT

TAX EFFICIENT, WHEN USING A LEASE

FUTURE FLEXIBILITY



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INTRODUCTION TO PROCESSES WHO CAN APPLY FOR ENERGY EFFICIENCY FINANCING?

ALL TYPES OF ORGANISATIONS!

FROM SOLE TRADERS AND PARTNERSHIPS THROUGH TO LARGE
CORPORATIONS AND GOVERNMENT BODIES

CUSTOMER DETAILS

FOR ALL CUSTOMERS

- CUSTOMER'S FULL TRADING STYLE
- CUSTOMER'S ADDRESS AND POSTCODE
- THE DATE THE BUSINESS WAS ESTABLISHED
- DETAILS OF ENERGY EFFICIENT EQUIPMENT TO BE FINANCED

TRADING INFORMATION

FOR LIMITED COMPANIES & PLC'S

- COMPANY REGISTRATION NUMBER
- IF < 3 YEARS TRADING, DETAILS OF DIRECTORS AND THEIR HOME ADDRESSES

FOR SOLE TRADERS & PARTNERSHIPS

- FULL NAME(S) OF SOLE TRADER/ALL PARTNERS
- 3 YEARS TRADING, EVIDENCE OF DATE STARTED, E& VAT NO.
- FOR APPLICATIONS >£5,000 UP TO DATE ACCOUNTS

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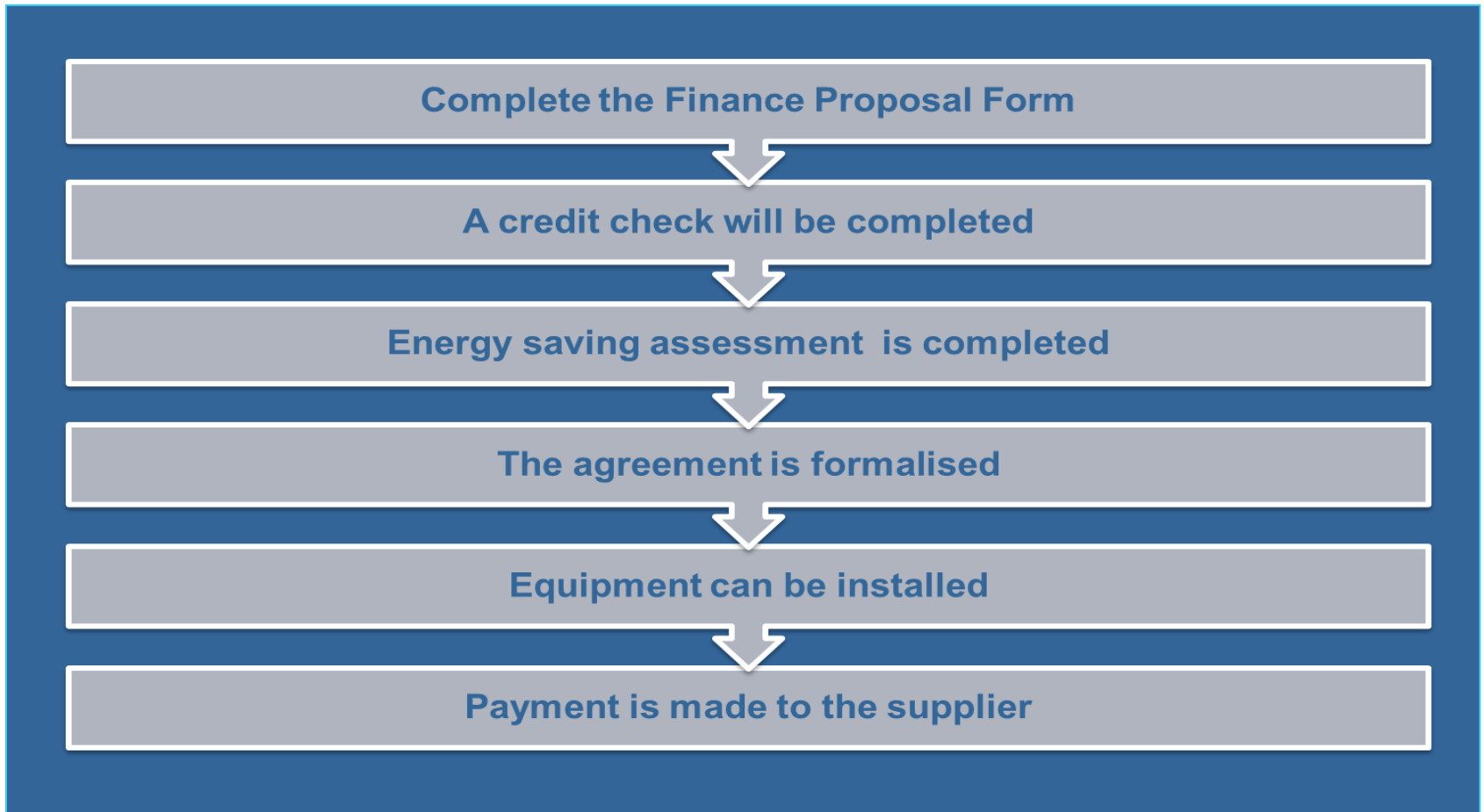


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INTRODUCTION TO THE PROCESS

THE APPLICATION PROCESS



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**FOR MORE INFORMATION ON THE APPLICATION PROCESS,
PLEASE REFER TO THE *SUPPLIER GUIDE TO PROCESSES AND
PAPERWORK* IN YOUR SUPPLIER PACK**

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INTRODUCTION TO THE PROCESS HOW TO CALCULATE THE FINANCE PAYMENT

- **A FINANCE CALCULATOR WILL BE PROVIDED**
- **YOU WILL BE REQUIRED TO INPUT THE ENERGY SAVINGS**
- **THIS WILL THEN CALCULATE THE MONTHLY PAYMENTS BASED ON THE ROI**
- **THE FIGURES PROVIDED ARE STILL SUBJECT TO CREDIT AND THE ENERGY SAVING ASSESSMENT.**



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BECOMING A RECOGNISED SUPPLIER

- TO BECOME A RECOGNISED SUPPLIER OF THE ENERGY EFFICIENCY FINANCING SCHEME REQUIRES A TRADING AGREEMENT BETWEEN SIEMENS & YOUR BUSINESS
- THIS SETS OUT THE BASIC TERMS OF YOUR ARRANGEMENT FOR ENERGY EFFICIENCY FINANCING, INCLUDING:
 - FINANCE AGREEMENT DETAILS
 - PRICING FOR THE SCHEME
 - CREDIT CHECKING PROCESS
 - THE PROCESS FOR PAYING YOUR INVOICES
- IN ORDER TO INTRODUCE CERTAIN TYPES OF BUSINESS CUSTOMERS TO SIEMENS, THE OFFICE OF FAIR TRADING REQUIRES YOU TO HAVE A 'CONSUMER CREDIT LICENCE' - WHICH YOU CAN APPLY FOR ONLINE:



[HTTP://WWW.OFT.GOV.UK/OFTWORK/CREDIT-](http://www.offt.gov.uk/oftwork/credit-licensing)

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FOR MORE INFORMATION ABOUT THE BENEFITS OF ENERGY EFFICIENCY FINANCING, PLEASE REFER TO THE *SUPPLIER BENEFITS BOOKLET* IN YOUR SUPPLIER PACK

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CASE STUDY

KING EDWARD VII AND QUEEN MARY SCHOOL

- **THE PROJECT: NEW REPLACEMENT ENERGY EFFICIENT LIGHTING THROUGHOUT THE SCHOOL, ALONG WITH INSTALLATION OF A MORE EFFICIENT BOILER SYSTEM WITH MORE EFFECTIVE CONTROL.**
- **THIS IS A LOAN WITH THE MONEY PROVIDED UP FRONT.**
- **THE INSTALLATION OF BOTH SYSTEMS IS CURRENTLY UNDERWAY, WITH COMPLETION DUE AT THE END OF AUGUST.**
- **THE ENERGY SAVING ASSESSMENT WAS IN LINE WITH CLIENT EXPECTATIONS AND SUPPLIES A GOOD PROVISION OF INFORMATION SUPPORTING ENERGY SAVING MEASURES.**



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OVERVIEW OF BENEFITS

ALL ORGANISATIONS CAN APPLY (INC. PUBLIC SECTOR)

£1000 + UPWARDS

SUPPLIER CONTROL OVER PROCESS

REDUCTION IN LEVEL OF CO₂ REQUIREMENTS

DIRECT PAYMENT TO SUPPLIERS

MORE PRODUCTS GIVES MORE FLEXIBILITY

TERMS TO CREATE POSITIVE CASH FLOW



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QUESTIONS & ANSWERS SESSION



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