



Landis+Gyr – a Portrait

Landis+Gyr
manage energy better

Today, Landis+Gyr...

- + ...is leading the transformation towards “Smart Metering” offering intelligent energy meters and total solutions mainly to energy utilities.
- + ...creates customer value through innovation in energy management that produces better economic and environmental outcomes for utilities, consumers and society.
- + ...develops, manufactures and sells meters, devices and system solutions for electricity, gas, water and heat for residential, commercial, industrial and grid applications.



Meters &
Endpoints



Communication
Networks



Data Management
Application



Demand
Management

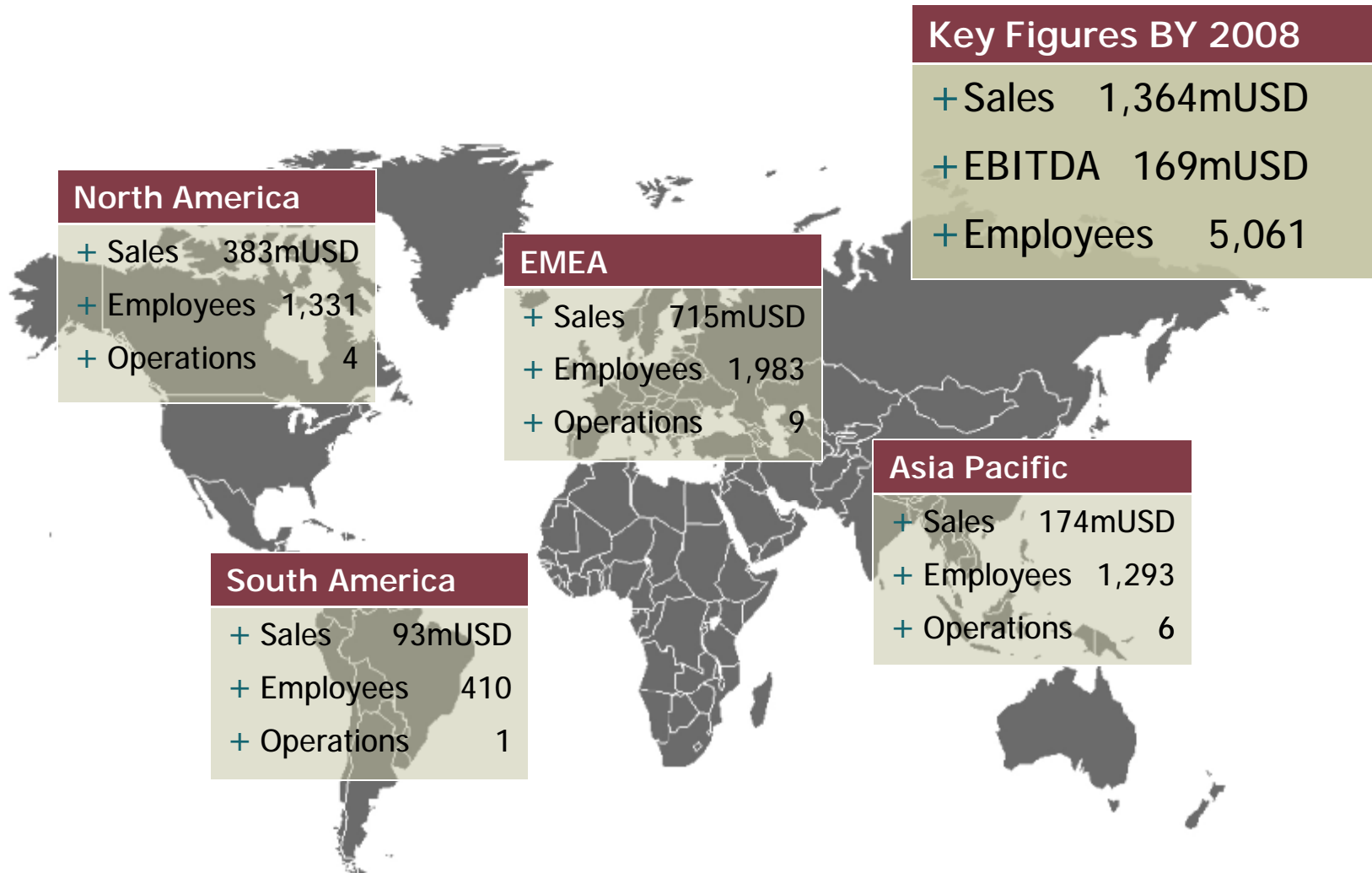


Distribution
Automation



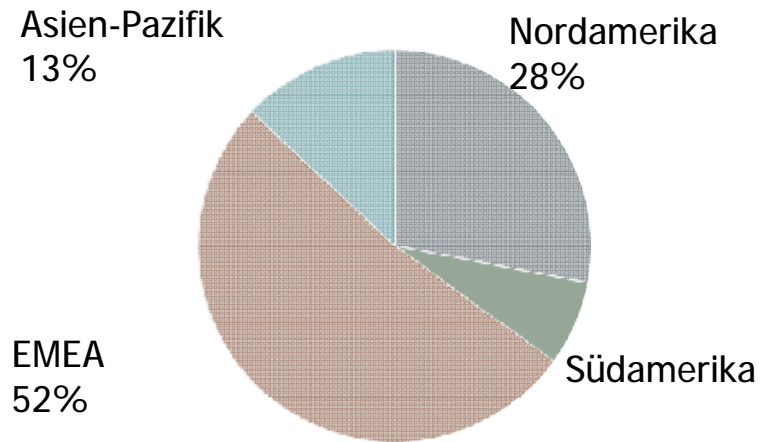
Deployment &
Operations
services

A global Powerhouse for Advanced Metering

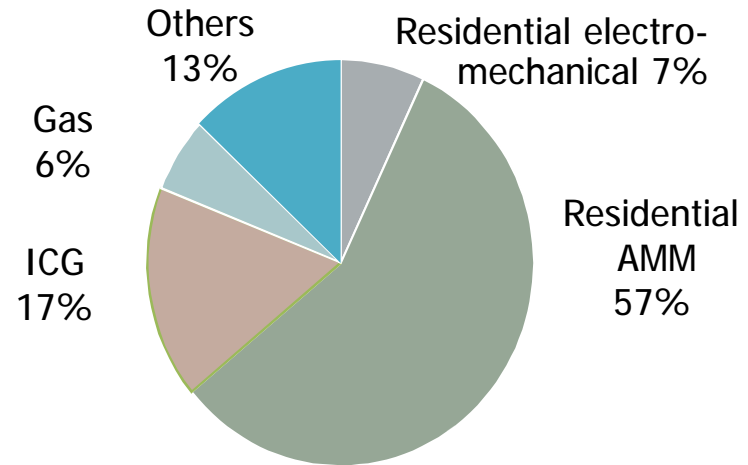


Facts & Figures BY 2008

Sales by regions



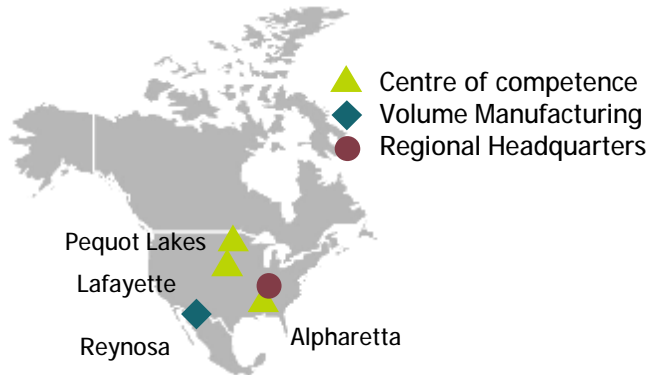
Sales by segments



Key Figures	BY 2007	BY 2008
Sales	1,227 mUSD	1,364 mUSD
R&D	5.3%	5.6%
Manufacturing Sites	16	15
Operating Entities	45	45
Employees	5'061	5'073

North America: Front-Runner with Advanced Metering Infrastructure

Partner for innovative
Technology and
Total Solutions



Facts & Figures

Order entry

BY 2007

197 mUSD

BY 2008

614 mUSD

Sales

375 mUSD

383 mUSD

Employees

1,280

1,331

Positioning

- + #2 for AMI in North America
- + Largest fixed-network customer base,
20 million endpoints deployed or under contract
- + Preferred supplier for AMI meters in the US

South America: Preferred Partner for Electricity Metering

Preferred Partner –
innovative & reliable



- ▲ Centre of Competence
- ◆ Volume assembly
- Regional Headquarters
- Sales entity

Facts & Figures

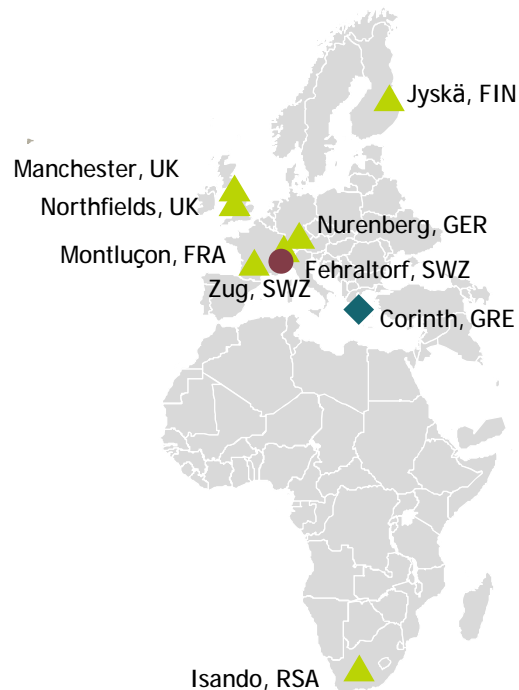
	BY 2007	BY 2008
Order entry	130 mUSD	81 mUSD
Sales	91 mUSD	93 mUSD
Employees	408	410

Positioning

- + Market leader for Electricity Meters
- + Pioneer in AMM solutions to fight energy theft
- + Successful entry into services

EMEA: Leading with Advanced Meter Management for Multi Energy Solutions

One-stop-shop multi energy solutions



- ▲ Centre of competence
- ◆ Volume manufacturing site
- Regional headquarters

Facts & Figures

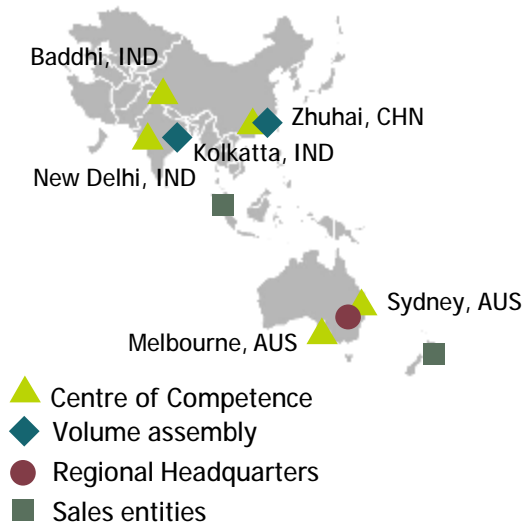
	BY 2007	BY 2008
Order entry	738 mUSD	605 mUSD
Sales	607 mUSD	715 mUSD
Employees	1,942	1,983

Positioning

- + #1 in AMM
- + #1 in Prepayment for gas and electricity
- + Leader in load and tariff management

Asia Pacific: From Meters to Advanced Metering

Intelligent Solutions for changing Needs



Facts & Figures

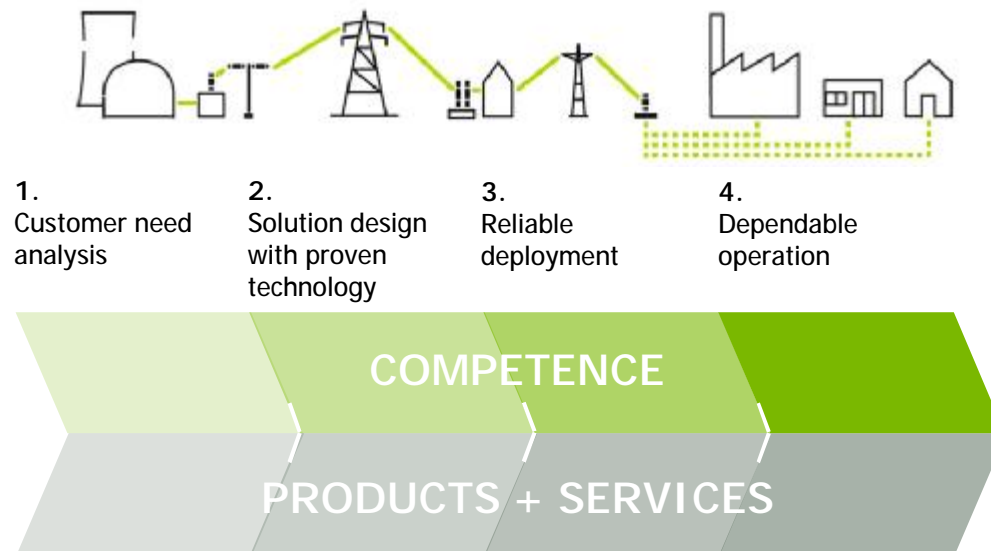
	BY2007	BY 2008
Order entry	164mUSD	171 mUSD
Sales	155 mUSD	174 mUSD
Employees	1,431	1,293

Positioning

- + Leader in electricity metering in Australia & New Zealand
- + Leader in China and India with high-quality "long life meters"
- + #1 to #3 position with Load Management, Prepayment and Gas in local niche markets

Our Value Proposition

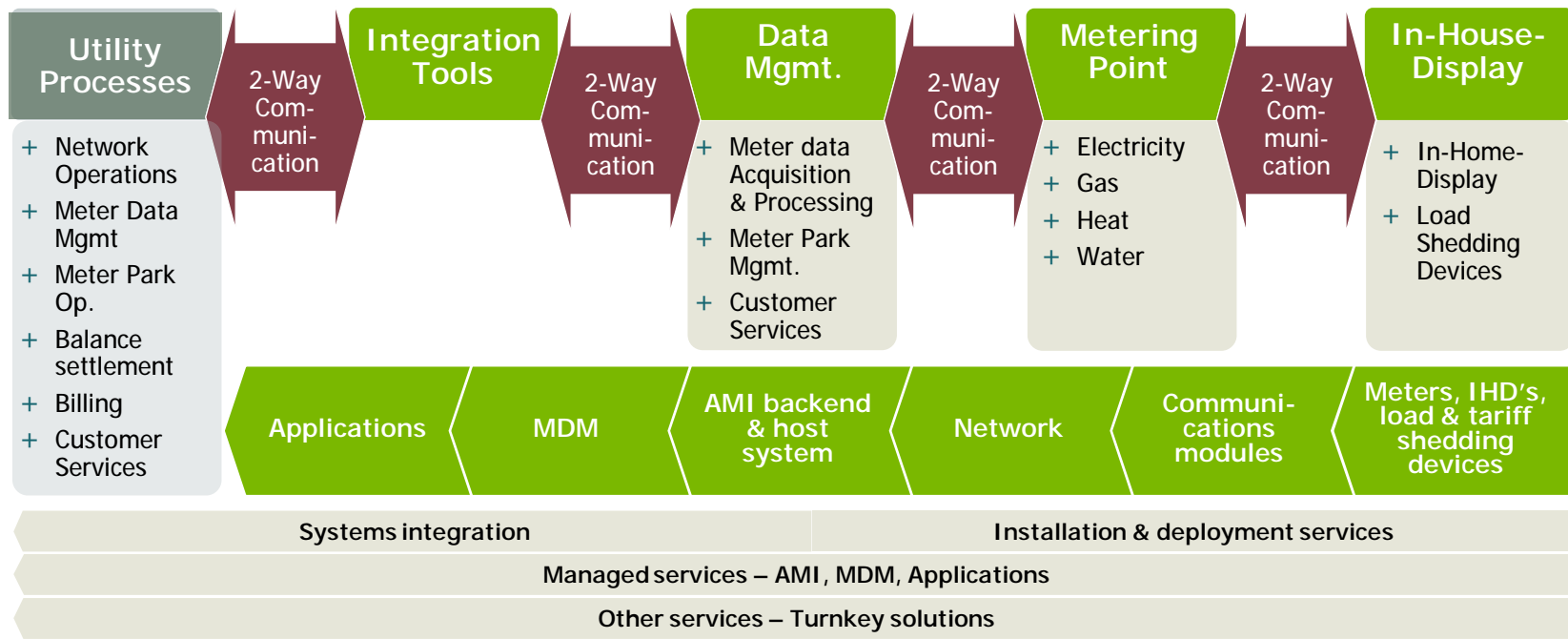
A global network of experienced specialists and proven technologies



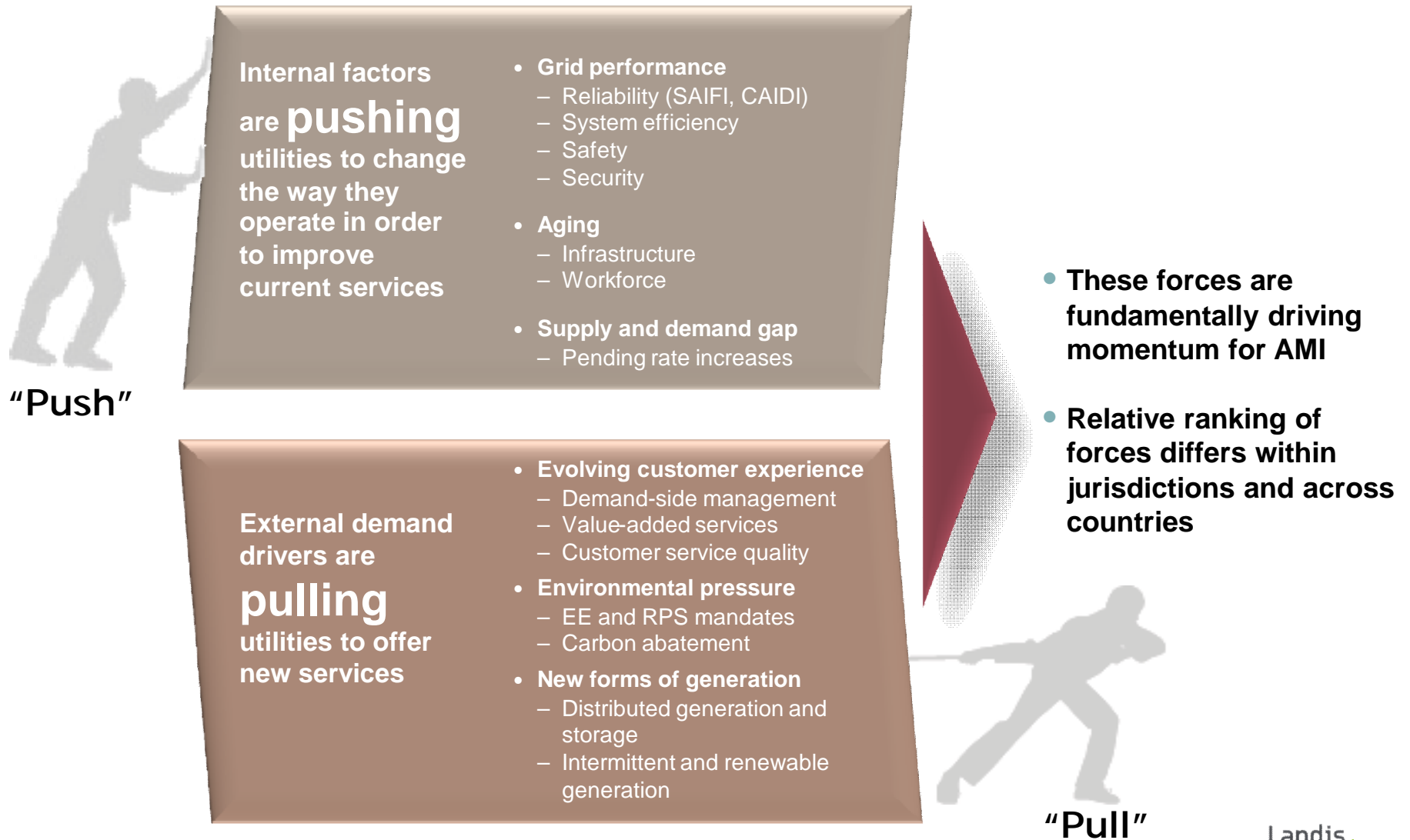
Combining the skills and expertise of leading specialists:

- + A unique offer of qualified specialists
- + Reliable technology, tailored to the specific needs of energy utilities
- + Experienced partners, proven track-record and in-depth knowledge of our customers' processes
- + "All from one" – enviable market offering: from process analysis to turn-key installations including deployment and operations

Our market offering: Total solutions to Manage Energy Better



AMI and Smart Grid Momentum is Driven by Fundamental Changes in the Electric Utility Industry



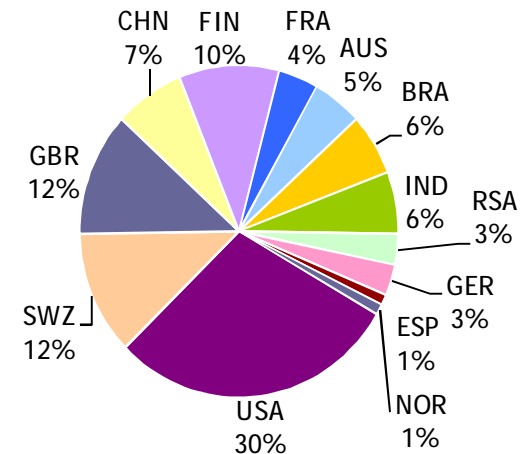
Global Footprint & local Presence



▲ Centre of competence ◆ Volume manufacturing site ● Regional Headquarters

- + Network of “centres of competence” and dedicated assembly lines
- + Global supply chain

R&D employees: 755



- + Industry's largest R&D and knowledge pool
- + Proven track record
- + Own core technologies

Large contracts in North America

Customer



USA

Highlights

- + US\$275 million product sale contract for ~3.4 million AMM endpoints with 2-way RF communications
- + Joint development of the Oncor Smart Texas Mobile Experience Center for regulatory and consumer education & support



USA

- + US\$230-300 million contract as the primary meter supplier for 5 million endpoint deployment



Colorado Springs Utilities

USA

- + Turnkey project for ~500,000 electric, gas and water AMI endpoints with 2-way RF communications
- + Deployment is completed; Colorado Springs now rated 3rd overall in customer satisfaction by JD Powers



USA

- + 1.6 million AM endpoints under long-term contract
- + L+G delivers daily reads for the installed base of electric and gas meters



Large contracts in Europe

Kunde



Italien

Highlights

- + Installation of 1.5 million AMM meter points in Rome



Schweden

- + €100 million turnkey contract for 390,000 AMI endpoints
- + Includes a six year operations contract for the delivery of meter readings



Dänemark

- + €40 million multi energy turnkey contract for 200,000 AMI endpoints including electricity, heat and water meters
- + Piloting ecoMeter in-home-display providing consumers with real-time information about electricity, heat and water consumption and CO2 footprint

Established Partner of Blue-chip Utilities

North America



Europe, Middle East and Africa



Our Portfolio: Energy Measurement Products and Energy Management Solutions

Advanced Metering Infrastructure



- + One-stop-shop range of hardware, software and proven communication technologies all linked into a seamless Advanced Metering Infrastructure for multi energy solutions

Communication Technology



- + Communication solution in PLC, PSTN, GSM / GPRS, Zig-Bee or radio-mesh to ensure reliable integration of metering point into Advanced Metering systems

Smart Grid



- + Making the smart grid vision real by linking demand response options, time-of-use and critical peak pricing with load control, disconnect and customer notification technology

Electricity Meters



- + World class range of meters for all segments with and without communication
- + High precision meters for grid metering
- + Extended functionality including prepayment

IT Systems and MDM solutions



- + IT systems for the acquisition, evaluation and processing of metering data
- + Hardware, Software, turnkey projects, end-to-end solutions and ASP services

Gas Meters



- + Conventional and electronic gas meters
- + prepayment modules and functionality, offering a variety of communication and billing methods

Personal Energy Management



- + Real time transparency regards consumption, cost and environmental impact
- + Load shedding devices and load management solutions to manage demand response

Heat Meters



- + Heat and cold meters with ultrasonic technology for superior measurement accuracy and longer life
- + Easy integration into multi-energy AMI

Providing real-time information to energy consumers

Transparency as basis for behavioral change



“ecoMeter” in-house display features:

+ ecoMeter Home Screen

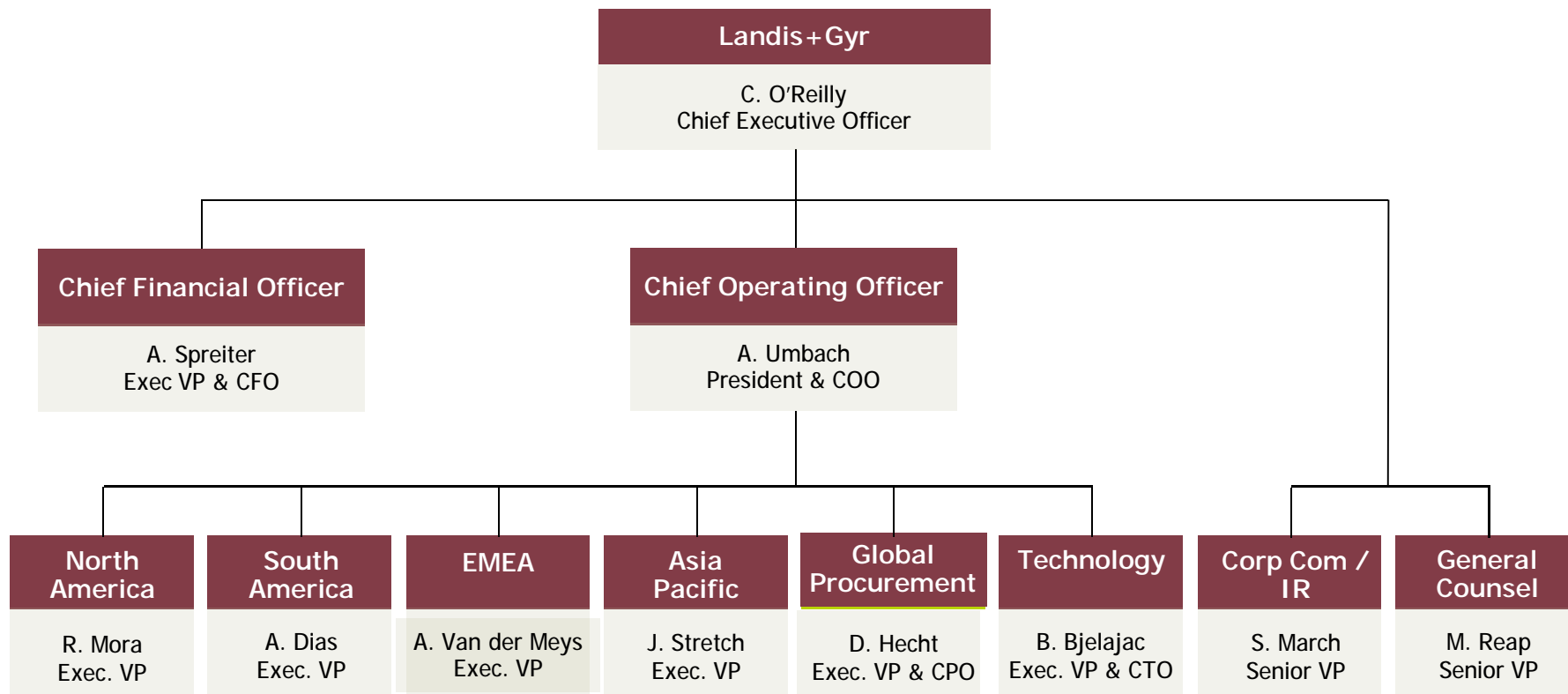
- Electricity information
(current and recent history of electricity consumption)
- Greenhouse gas emissions information
(current and historical in kg Co2/hr)
- Water use information
(current & historical consumption in liters)
- Historical home energy & greenhouse gas emissions information for last day, week and month

+ Tariff lights

+ Menu Options

- View and scroll through details about e.g. electricity tariffs, system information, contact / supplier information and dynamic Peak Alerts

Management structure



Executive Management

Cameron O'Reilly, CEO



- + Founder and MD of Landis+Gyr Holdings, formerly Bayard Group; Australian and Irish
- + Previously CEO of APN media group in Australia
- + Honors degree in economics, politics and philosophy, Oxford University

Andreas Umbach, President & COO



- + Appointed in October 2000; German
- + Various executive positions within Siemens
- + Degree in Mechanical Engineering TU Berlin, MBA University of Texas, Austin

Andreas Spreiter, Exec VP & CFO



- + Appointed in June 2002; Swiss & British
- + Formerly Head of Controlling and Head of Center of Competence I&C of Landis+Gyr
- + Degree in Industrial Engineering & Business Administration ETH Zurich

Richard Mora, Exec VP North America



- + Appointed in October 2000; American
- + Formerly Director of Quality at Siemens PTD; Manager M&A at GE Capital
- + BA Economics Stanford University

Álvaro Dias Júnior, Exec VP S America



- + Appointed in July 2005; Brazilian
- + CEO of Landis+Gyr Brazil
- + Degree in Electrical Engineering Universidade de Campinas São Paulo

Ad van der Meys, Exec VP EMEA



- + Appointed in May 2008; Dutch
- + Various executive positions, including with BT, Deutsche Telekom and Level 3 Communications
- + Qualified in Business, Business School of Amsterdam

Jon Stretch, Exec VP Asia Pacific



- + Appointed in January 2008; Australian
- + Various executive positions in the IT and telecommunications industry, e.g. AT&T, IBM and more recently CEO of AAPT
- + Degree in Computer Science, University of Melbourne

Dieter Hecht, Exec VP & CPO



- + Appointed in July 2003; German
- + Former Executive Board Member Eon (Sales, power trade) and GE ITS Europe
- + Degree in Marketing & HR, University of Appl. Sc. Munich; Exec. Program GE University

Branko Bjelajac, Exec VP & CTO



- + Appointed in November 2007; German & Serbian
- + Various executive positions at Mannesmann/Vodafone, Grundig, SITA and Orange
- + Degree in EE, University of Belgrade; Ph.D. in EE, TU Aachen; Executive Program at INSEAD

Highest quality and environmental compatibility

Quality, health, safety and environmental policy

- + We are committed to providing our customers with quality services and products
- + Our policy is to integrate quality, health, safety and environmental aspects into the scope of our business considering them as opportunities for improvement, by...
 - ...developing a culture of continuous improvement
 - ...using six sigma principles in the management of our Operations, Health and Safety and the Environment.
 - ...creating substantial added value for customers through the continual ecological improvement of our products and services, also avoiding the use of harmful materials and keeping waste to a minimum.
 - ...complying with relevant health safety and environmental legislation, regulations, standards (ISO9001, ISO14001, BS18001) and codes.



Thank you

