

# Balancing Act: The Reality in Today's Worldwide Utility Sector

## Weighing cost reduction and risk management with delivering customer satisfaction and shareholder value

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### Abstract

This white paper is an overview of the worldwide utility sector and the balancing act that has become a daily reality no matter where organizations fall along the supply chain. Whether utility generator, transmitter and distributor, or retail operator, there is a fine balance between weighing cost reduction and risk management with delivering customer satisfaction and shareholder value. By reviewing the main challenges faced along the supply chain we demonstrate how easy access to immediate, accurate information is essential to achieve balance and, in turn, profitability.

- As a **generation organization**, do you have all of the asset information you need to minimize task time and maximize uptime?
- As a **distribution and transmission organization**, do you have immediate access to accurate information to address everything from equipment breakdowns to trees falling on power lines?
- As a **retail operator**, do your staff across disciplines and in geographically disperse locations have up-to-the-minute access to the same information so they can work collaboratively as teams on customer service issues?

Everything from Capital Asset Information Management and Customer Relationship Management to compliance and eDiscovery requires a solid Enterprise Content Management (ECM) strategy as its underpinning, and if ECM is lacking anywhere along the utility supply chain, the consequences are the same: profitability is compromised.



# Contents

- Executive Summary ..... 3**
  - The right information to the right people at the right time ..... 4
  - Achieving balance is reflected in the bottom line ..... 5
  - ECM is mission critical: Valuable lessons learned along the supply chain ..... 5
- Utility Generation Organizations..... 6**
  - ECM underpins effective Capital Asset Information Management..... 6
- Utility Transmission and Distribution Organizations ..... 8**
  - ECM underpins effective Capital Asset Information Management and Customer Relationship Management ..... 8
- Utility Retail Operators ..... 10**
  - ECM underpins effective customer acquisition and retention..... 10
  - Immediate, accurate information drives customer acquisition..... 10
  - Immediate, accurate information drives customer retention..... 11
- The Great Equalizer: Regulatory Compliance and eDiscovery ..... 13**
- Regulated Versus Deregulated Environments ..... 15**
  - Different business drivers, same balancing act..... 15
- Lesson Learned: ECM Is a “Must Have” Along the Worldwide Utility Supplier Chain..... 18**



## Executive Summary

It would not be an overstatement to say that nowhere is Enterprise Content Management (ECM) such a critical success factor as in the utilities sector. The experience of organizations along the supply chain—from generators to transmitters and distributors to retail operators worldwide, regardless of whether they are regulated or deregulated—reveals important lessons about ECM, helping establish best practices that apply across the utility sector worldwide.

Making critical decisions about issues that pull in competing directions is a daily challenge as utility organizations strive to balance risk management and cost containment with their commitment to consistently deliver customer satisfaction and shareholder value. And a fine balance it is—decisions made in any one realm create a ripple effect throughout the organization, triggering a series of decisions and actions that can negatively impact the bottom line.

With profit margins directly tied to the balancing act between cost reduction, risk management, governance, and revenue generation, most utility organizations are looking for solutions that will enable them to make well-informed, insightful decisions. This requires quick access to accurate shared information by the right people at the right time so that the right decisions can be made to control costs and minimize risk while maximizing customer satisfaction and shareholder value. Everywhere along the supply chain, the solution must include ease of communication and collaboration with accurate, immediate content sharing across de-centralized locations.

Reliance on a sound Enterprise Content Management (ECM) is what brings balance to the equation, and, by contrast, ineffective and inefficient ECM is what tips the balance toward negative outcomes. Although the risks and business drivers vary along the spectrum of utility suppliers, the consequences of poor ECM are the same; the organization feels the negative financial impact in everything from cash flow and liquidity to its lean operations to talent and knowledge retention to its internal controls and customer retention.

This balancing act also persists across borders—no matter where in the world the organization is operating, the need for solid ECM has become a “must have” across the utility sector worldwide. The underpinning to achieving balance is solid ECM, allowing the organization to integrate and streamline its vast amount of information to maximize profitability while delivering customer and shareholder value with regulatory compliance.



## The Balancing Act

Whether it's a utility generator, transmitter and distributor, or retail operator—in a regulated or deregulated environment—the reality faced by today's utility sector organizations across the globe is a continuous balancing act. Making critical decisions about issues that pull in competing directions is a daily challenge as utility organizations strive to balance risk management and cost containment with their commitment to consistently deliver customer satisfaction and shareholder value.

Competing forces like managing field operations and infrastructure capital costs, regulatory compliance and litigation issues, asset management and safety risks, environmental issues, customer acquisition and retention, and human resources management are just a sampling of the myriad of issues that are all part of the balancing act. And a fine balance it is—decisions made in any one realm create a ripple effect throughout the organization, triggering a series of decisions and actions that can negatively impact the bottom line.

There is a direct relationship between investment in acceptable risks and maximizing customer satisfaction and shareholder value. Accordingly, maximizing profitability requires immediate access to all of the information associated with diverse aspects of the utilities environment to leverage opportunities while minimizing risks. Utility organizations require fluid integration of all information—everything from asset information and engineering drawings to business plans and financial plans to customer account profiles and servicing records to regulatory requirements and historical compliance documents.

## The right information to the right people at the right time

With profit margins directly tied to the balancing act between cost reduction, risk management, governance, and revenue generation, most utility organizations are looking for solutions that will enable them to make well-informed, insightful decisions. This requires quick access to accurate shared information by the right people at the right time so that the right decisions can be made to control costs and minimize risk while maximizing customer satisfaction and shareholder value. Whether generator, transmitter/distributor, or retailer (in a regulated or deregulated environment), the solution must include ease of communication and collaboration with accurate, immediate content sharing across de-centralized locations.

Reliance on a sound Enterprise Content Management (ECM) is what brings balance to the equation, and, by contrast, ineffective and inefficient ECM is what tips the balance toward negative outcomes. Although the risks and business drivers vary along the spectrum of utility suppliers, the consequences of poor ECM are the same; the organization feels the negative financial impact in everything from cash flow and liquidity to its lean operations to talent and knowledge retention to its internal controls and customer retention.



Not only is this the case regardless of where the organization falls along the supplier spectrum, it also holds true whether in a regulated or deregulated environment. This balancing act also persists across borders—no matter where in the world the organization is operating, the need for solid ECM has become a “must have” across the utility sector worldwide.

### Achieving balance is reflected in the bottom line

How does the organization know it has achieved successful balance? The answer lies in the bottom line. Success is measured in terms of the organization’s ability to minimize costs and manage risk while delivering profitability. What does industry experience tell us from frontline experience along the entire supplier spectrum? The underpinning to achieving balance is solid ECM, allowing the organization to integrate and streamline its vast amount of information to maximize profitability while delivering customer and shareholder value with regulatory compliance.

### ECM is mission critical: Valuable lessons learned along the supply chain

It would not be an overstatement to say that nowhere is ECM such a critical success factor as in the utilities sector. The experience of organizations along the supply chain—from generators to transmitters and distributors to retail operators—regardless of whether they are regulated or deregulated—reveals important lessons about ECM, helping establish best practices that apply across the utility sector worldwide.



## Utility Generation Organizations

### ECM underpins effective Capital Asset Information Management

For utility generation organizations, the ability to effectively manage resources and asset information has a direct—and far reaching—affect on their ability to deliver reliability, efficiency, and economy of services across their customer base. Ensuring reliability requires establishing a sound Capital Asset Information Management strategy that has as its foundation the ability to easily and quickly access accurate asset data and associated information.

For instance, generation organizations commonly need to store and easily access hundreds of thousands of engineering drawings, spreadsheets, and technical documents with many dating as far back as when their facilities were originally built. And any one of these documents may need to be found at a moment's notice. This is an enormous challenge when considering that many generation organizations still rely on manual processes to locate asset information that numbers in the tens of thousands. The organizations that lack an enterprise-wide Capital Asset Information Management strategy struggle to effectively and efficiently store, maintain, retrieve, and share asset information—severely compromising their asset knowledge, which results in inefficiencies.

The inability to quickly access accurate asset information causes a domino effect throughout the organization, often to the extent that simply trying to respond to typical day-to-day issues rapidly escalates to the point where subsequent decisions and actions end up negatively affecting the balance between assets, cash flow, and lean operations.

An example of how poor information management can have a far reaching impact is its impact on Task Time: the time it takes for a worker to conduct a task. Without an enterprise-wide Capital Asset Information Management strategy, the time spent looking for necessary information by a mechanic may end up being significantly higher than the actual time spent working on the equipment. As a result, although the mechanic may be skilled and effective at repairing the machinery, he may not be efficient because of the information management problem. Multiply this scenario by all of the mechanics across all facilities—and by all of the assets—and the magnitude of the problem is obvious. This scenario is not limited to the facility floor; the same inefficiencies are experienced by office workers who have to search extensively for information before they can complete their work.



Generation organizations that establish an ECM strategy leverage asset management by driving down the cost of their assets throughout the asset lifecycles while improving facility uptime, clearly gaining a competitive advantage. As a result, no longer is the balancing act so precarious. The investment in ECM not only positively influences margins through collaboration and quick accurate access to information but also through specific benefits like digital photograph storage that allows worksite and equipment photos to be stored along with their corresponding documentation, and benefits like intuitive archiving features that facilitate file management, even when files number in the tens of thousands across borders worldwide.



## Utility Transmission and Distribution Organizations

### ECM underpins effective Capital Asset Information Management and Customer Relationship Management

For transmission and distribution organizations, the balancing act is weighted by issues that are experienced by both their counterparts on the generation and retail ends of the supplier spectrum. Although transmission and distribution organizations do not generate power, they share the same infrastructure maintenance issues as generation organizations. Added to this capital maintenance requirement is the fact that transmission and distribution organizations must also focus on Customer Relationship Management (CRM) similar to the retail operator end of the spectrum. Although retail organizations typically focus on individual, private household customers whereas transmission and distribution organizations focus on large commercial customers, the CRM functions surrounding customer acquisition and retention are the same.

This dual role means that not only do transmission and distribution organizations require a solid Capital Asset Management System similar to generation organizations, it is also essential that they have a strong CRM system similar to retail organizations. CRM is a key business driver and can assist in everything from managing customer expectations and knowledge to responding efficiently to customers' needs and issues like outages to tracking usage levels for service and billing purposes. Whether in a regulated or de-regulated environment, easy and immediate access to accurate customer information is essential for CRM to successfully meet customer expectations.

As was the case with generation organizations, ECM is the most effective underpinning for transmission and distribution organizations to establish a solid Capital Asset Information system. Similarly, an ECM system is the starting point for building an efficient and effective CRM system—without ECM as its foundation, critical CRM functions are compromised negatively affecting the fine balance between cost containment, governance, risk, and profitability.

For instance, although transmission and distribution organizations are typically widely geographically dispersed, their local and regional managers each require quick and secure access to shared, up-to-the-minute information to ensure that service levels are maintained. Take this scenario a step further, and when issues arise like an outage, the need for immediate and accurate information is heightened as maintenance crews and customer service staff interact to solve the problem. Enterprise-wide, everyone needs to be on the same page in terms of up-to-date, accurate information.

Whether managing equipment like generation organizations or responding to an outage caused by a storm like retail operators, transmission and distribution organizations have come to the same conclusion as their counterparts along the



supplier spectrum: ECM is essential. Although the balancing act of cost, risk, and revenue take on different weights depending on where the organization falls along the spectrum, the domino effect is unavoidable. With poor ECM, the organization feels the negative financial impact to varying degrees in everything from cash flow and liquidity to its lean operations, talent and knowledge retention, internal controls, and customer retention.

Based on their unique role in the supply chain, ECM provides unique solutions for transmission and distribution organizations such as easily updated and accessible documents in a knowledge repository enabling staff anywhere to leverage existing knowledge—whether Capital Asset Management or CRM information. The result is the same: the ripple effect positively enhances the bottom line.



## Utility Retail Operators

### ECM underpins effective customer acquisition and retention

For retail utility organizations, the old adage, “location, location, location,” is rivaled by the mantra “service, service, service.” Specifically, their emphasis is on customer acquisition and retention through providing the right product offering backed by reliable service that meets customer expectations. This is achieved by making wise strategic decisions and effective tactical execution—all based on the ability to access accurate and timely information on a continuous basis.

### Immediate, accurate information drives customer acquisition

In terms of customer acquisition, marketing is the key business function. The marketing department must not only motivate interest but, ideally, also motivate purchasing behavior—including brand switching. This involves initially developing a product mix and after-sale service offering that appeals to the customer followed by determining the best way to spread the word—market research, product development, and sales and promotional campaigns are all part of the marketing process.

Accordingly, the marketing department requires information to drive product development activities, as well as the sales and promotional strategy to support it. For instance, not only do they require in-depth access to customer demographic information like age, income, residence, and gender but also psychographic indicators like customer needs, wants, values, attitudes, and lifestyles.

The marketing strategists also need to develop a keen understanding of how their own organization functions—strengths, weaknesses, opportunities, and threats of its geographic and regulatory environment—as well as how the organization operates internally in terms of adapting to product changes and especially concerning its ability to deliver on customer promises. Market research, customer profiles, contracts, existing service levels, invoices, transactional data, correspondence, historical records, and competitor information are just a few examples of the diverse types of information marketing departments need to make insightful product development, sales strategy, and promotional campaign decisions.

The ideal is to have easy and quick access to customer information across the customer’s entire history with the organization from the first touch point at the beginning of the relationship through changes in service offering and consumption levels to final disconnect. In addition, in both regulated and deregulated markets, it is a legal requirement that all incoming and outgoing correspondence be stored for ten years in case legal issues arise in the future.



The result is a massive amount of information—but without an ECM system, none of it may be actionable. An ECM system is essential to make sense of it all so information can be found quickly and easily in a format that is relevant for decision making.

## Immediate, accurate information drives customer retention

Once a customer relationship is established, customer retention becomes the priority. All customer service activities are under a backdrop of compliance because retail utility organizations are required to meet a range of regulatory standards focused on customer protection. Ultimately, these standards determine their customers' service expectations. As a result, meeting regulatory compliance standards while managing customer expectations, contracts, and correspondence is of primary importance. Procedures are established to handle the huge volume of information associated with customers, especially related to resolving customer complaints.

This information-overload challenge is compounded by communication trends in that today there are numerous avenues for consumers to interact with the organization—via phone, email, regular mail, fax, and sometimes even the old fashioned way, in-person. This ability to liaise with the organization in a multitude of ways makes a solid ECM system essential. The ECM system must ensure that the organization addresses all possible customer touch points consistently so that there is accuracy combined with accountability and responsiveness.

For instance, a customer complaint submitted via an organization's Web site typically triggers a series of procedures aimed at addressing the complaint. Not only must the procedures draw on the expertise of staff members who may represent diverse disciplines as well as be geographically dispersed but the right critical records must be found immediately to accurately, consistently, and quickly respond to the customer.

In many ways, the customer response process is similar to a legal eDiscovery process—the collection and review of electronic information during a litigation process such as emails and documents—because it requires the same level of detail, accuracy, and consistency. It's on a smaller scale, but it occurs much more frequently. To develop the right customer response, the retail organization's ECM system must receive the complaint in a timely fashion and quickly route the issue to the right staff member while accessing the right information. Most importantly, the ECM must make sure that the information is accurate and up-to-date so that it does not contradict a complaint or question previously answered. The importance of the ECM in providing a precise and comprehensive view of all customer information enterprise-wide is obvious: without it, the fine balance between costs, governance, risk, and revenue is continually precarious.



Whether aiming to increase customer acquisition or streamline customer retention activities, an ECM system provides full integration of all customer information. It makes the ideal scenario possible by addressing each customer touch point with easy storage, maintenance, and access. Both CRM and regulatory compliance are achieved, tipping the scales toward a positive financial outcome in relation to key measurements like cash flow and liquidity, lean operations, talent and knowledge retention, internal controls, and customer retention.



## The Great Equalizer: Regulatory Compliance and eDiscovery

No matter where an organization falls along the utility supplier spectrum, a discussion about lessons learned and best practices would be remiss without highlighting regulatory compliance and eDiscovery. Although regulatory compliance and eDiscovery (the collection and review of electronic information during a litigation process such as emails and documents) is top of mind across industries, it is especially relevant in the utilities sector worldwide whether in a regulated or unregulated environment. For instance, almost 80 percent<sup>1</sup> of utility sector respondents in the *Fulbright & Jaworski 2008 Litigation Trends Survey* indicated eDiscovery or Cost Management as their primary concern.

The nature of the utilities sector, with its often potentially explosive and dangerous products, always present and hazardous electricity, and frequent involvement in aggressive exploration and capital projects, makes compliance and eDiscovery top of mind for good reason. The volume of issues that could lead to litigation, court fines, and sanctions that are time consuming and costly makes eDiscovery a daily consideration. As reported in the *Fulbright & Jaworski* study, 22 percent<sup>2</sup> of energy companies had more than six regulatory proceedings brought against them and 15 percent<sup>3</sup> of the energy sector was involved in one or more proceeding worth \$20 million—a leading percentage for all industry sectors.

As described by Rebecca Ptaszynski, an associate in the Commercial Litigation Group at Vedder Price, a general practice law firm, one of the biggest concerns for utility sector organizations is complying with the abundance of rules and regulations facing them at any given time. “From a legal perspective, when organizations are looking at retention periods and they are putting together records and information management policies, one of the biggest concerns that an energy company would face would be complying with regulatory and record retention requirements when they are faced with a large volume of litigation,” Ptaszynski stated. “It’s true with any industry that is highly regulated but in particular with energy organizations. They’re looking at tens if not hundreds of regulatory actions at any given time.”

Specifically in terms of eDiscovery, utility sector organizations must also adhere to Federal Rules of Civil Procedure (and other such governance around the world) stipulating that they must have defensible policies and practices in place for the management of electronically stored information. In addition, numerous compliance regulations unique to the utilities sector require that certain types of documents and emails be retained for specific timeframes.

Another consideration is that regulations often vary from country to country, including those related to eDiscovery. This further complicates the situation because most utility organizations work on a global scale with information created in numerous locations around the world—all with different rules and regulations for eDiscovery and privacy concerns. The very nature of the utility sector means



there are often many remote locations where a lot of information is created. The utility sector, likely more than any other industry, face more organizational, geographic, and geo-political silos of information than any other industry, and all with information that must be easily and immediately searchable should litigation arise.

Without a unified ECM system, it is difficult to determine not only what information is available and where it is stored but also to be confident that it is accurate and up-to-date—both critical to regulatory compliance and eDiscovery. Whether a utility generator, transmitter and distributor, or retail operator, in a regulated or deregulated environment the risks associated with regulatory compliance and eDiscovery are the same: a shortfall can have a devastating financial impact, dramatically tipping the scales toward decreased revenue.



## Regulated Versus Deregulated Environments

### Different business drivers, same balancing act

Similar to regulatory compliance and eDiscovery, it is necessary for any discussion of the utility sector to also address the regulatory environment. Whether operating in a regulated or deregulated environment, when comparing the costs and operating models of a regulated versus a deregulated utility organization, although the business drivers may vary, the outcome is the same—there is a fine balance between managing risks and profitability.

For instance, in a **deregulated environment**, managing the Rate Case Submission Process (i.e., a Rate Case Submission Process is the formal process that utility organizations must follow to set the price rate they can charge customers for their service) and all of its intricate information requirements is a highly detailed and high-stakes task because its outcome directly influences liquidity, revenue, and profit margins. In practice, the common scenario is that what begins as a financial strategic exercise involving a few employees quickly evolves into a development process that involves a team of experts drawn from throughout the organization, most of whom do not have time or resources dedicated to this task.

This is compounded by the reality that assessment of the product mix, especially rates, is a much more frequent exercise in the deregulated environment. Changes in the product offering, especially pricing, can have dramatic impact on the bottom line. Again the fine balance between risk and profitability is tested. In this case, it's related to customer retention, liquidity, and margins. The cost of customer churn (the number of customers who discontinue service), hook up and disconnection costs, meter read costs, as well as marketing costs for acquisition and retention all add up, as illustrated by the France experience since the market became deregulated in 2007:

In its latest Electricity and Gas Market Observatory, the French regulator, Commission de Régulation de l'Énergie (CRE), has reported that at December 31, 2008, a total of 692,000 electricity customers and 416,000 gas customers had switched supplier since the market was opened in July 2007. This compares with 515,000 electricity customers and 310,000 gas customers who had switched supplier at September 30, 2008. There are a total of 29.7 million electricity customers and 10.8 million gas customers. In total 7 percent of non-residential electricity customers (accounting for 12 percent of total consumption) and 14 percent of non-residential gas customers (accounting for 18 percent of total consumption) have now chosen an alternative supplier. About 160 local suppliers, including the incumbent suppliers, were active in France at



December 31, 2008. These suppliers operate locally or regionally and offer contracts to one or more segments of customers.<sup>1</sup>

All too often, for utility sector organizations that do not have an established ECM, the assessment of the product mix, particularly the Rate Case Submission Process, becomes a costly exercise that overwhelms the entire organization. Difficulty finding information and coordinating the numerous tasks results in chaos and confusion, both costly variables. As a result, inaccurate or missing information or missed deadlines can delay approval of the proposed rate increase or worse, result in denial of the increase.

Easy collaboration, clear processes, and solid project management are critical to making sure that every document in the final Rate Submission is accurate, legally compliant, and supported by an air-tight audit trail.

Similarly, in a **regulated environment**, utility organizations also benefit significantly from ECM. Although in this environment rate, submission is not a main business driver; customer retention is. Access to information related to customer profiles, service levels, product specifications, pricing structures, and competitors drives the business. Immediate and accurate access to information leads to fast and successful decision making. By contrast, slow and inaccurate access to information leads to poor and delayed decision making, and that can be a deal breaker in the regulated competitive marketplace.

Whether deregulated or regulated, the message is clear: customer retention matters. As illustrated by this example drawn from the wireless industry experience:

- The cost of acquiring a new wireless customer averages between \$250 and \$300 per subscriber in the United States.
- Based on these statistics, there were between 28 million and 36.7 million churned subscribers in fiscal year 2000. At the low-end cost of \$250 per acquisition, the cost of acquisition for this group ranged between \$7.2 billion and \$9.2 billion.
- The U.S. wireless industry made about \$52 billion last year, so the cost of acquisition amounted to at least 17.7% of gross revenue. And at current revenue levels, it takes about five-and-a-half months of service simply to recoup the acquisition expense.
- The situation is similar throughout most of Europe, where cost of acquisition, churn rates and declining monthly average revenue per user figures all put a squeeze on providers.<sup>2</sup>

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<sup>1</sup> Fulbright & Jaworski LLP, *Fifth Annual Litigation Trends Survey Findings*, 2008.

<sup>2</sup> Lisa Pierce, *Network World*, 2001.



The bottom line is the bottom line. Regardless of whether operating in a deregulated or regulated environment, there is a balancing act that can either positively or negatively impact profitability. Whether it is related to balancing rate increases against supply costs from generators or the cost of infrastructure ownership versus rent or recovery costs related to customer churn, it is irrelevant because the outcome is the same: decision making in these areas will either positively or negatively impact margins. Just as the outcome is the same so is the required input: critical, accurate, and up-to-the-minute information via a sound ECM system.



## Lesson Learned: ECM Is a “Must Have” Along the Worldwide Utility Supplier Chain

Making critical decisions about issues that pull in competing directions is a daily challenge as utility organizations strive to balance risk management and cost containment with their commitment to consistently deliver customer satisfaction and shareholder value. And to do this, they require the fluid integration and access of all of their information, available to the right people at the right time.

- As a generation organization, do you have all of the asset information you need to minimize task time and maximize uptime?
- As a distribution and transmission organization, do you have immediate access to accurate information to address everything from equipment breakdowns to trees falling on power lines?
- As a retail operator, do your staff across disciplines and in geographically disperse locations have up-to-the-minute access to the same information so they can work collaboratively as teams on customer service issues?

If ECM is lacking anywhere along the utility supply chain, the consequences are the same—regardless of the regulatory environment—profitability is compromised.



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**EMEA – English:** energy.emea@opentext.com  
+44 (0)1189 848 080

[www.opentext.de/3/global/sol-industry/sol-energy-home.htm](http://www.opentext.de/3/global/sol-industry/sol-energy-home.htm)

**EMEA - German:** energy.emea@opentext.com  
+49 (0)89 4629 0 / +41 (0)58 258 94 00

**[www.opentext.com](http://www.opentext.com)**