



Enel X Introduction

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The Enel Group Worldwide

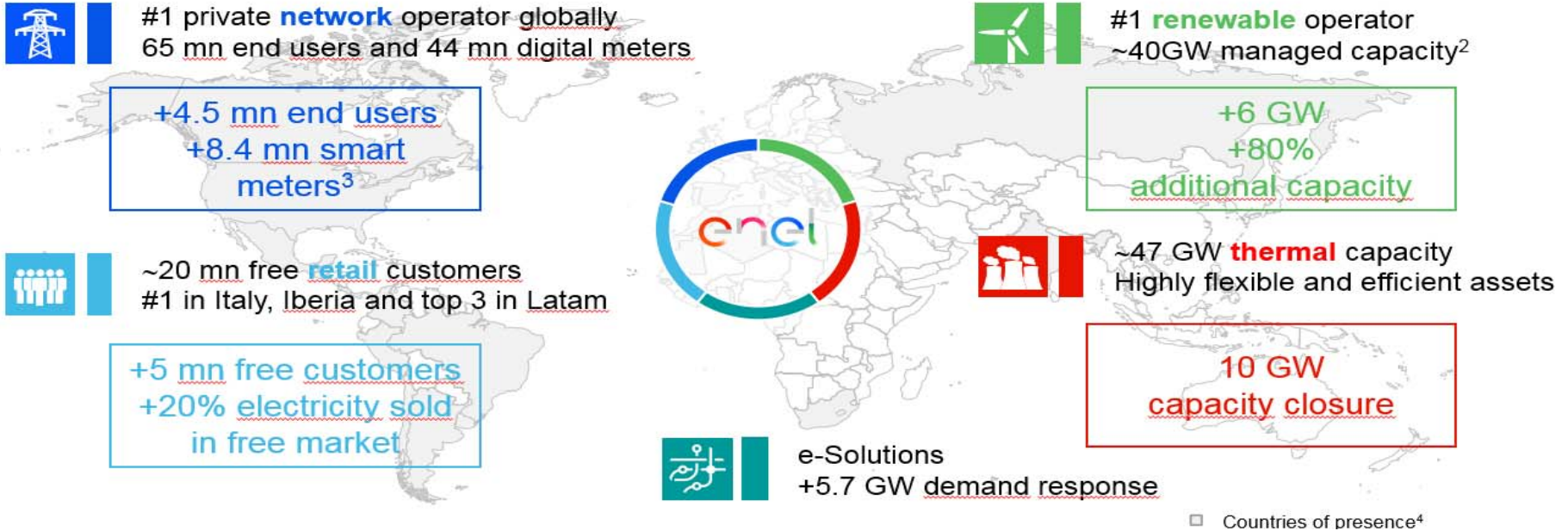
A multinational power company and leading integrated player in the world's power and gas markets



- #74 on Fortune 500 with \$84B in annual revenue; nearly 70,000 employees across five continents
- Ranked 20th on Fortune's 2017 "Change the World" list
- Acquired Demand Energy, EnerNOC and eMotorWerks in 2017 to serve as the foundation for new Enel X division
- Over 7,500 MW of capacity in North America including over 4,000 MW of renewables managed by Enel Green Power and 3,500 MW of demand response managed by EnerNOC

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Evolution since 2014¹



1. 2014-2017 delivery. As of 2017E
 2. Consolidated capacity equal to 37 GW (including 25 GW of large hydro)
 3. Including replacement of smart meters 2.0 in Italy equal to 1.4 mn. Enel global market share equal to 24% (BNEF 3Q17 Energy Smart technologies market Outlook)
 4. Presence with operating assets

Macro Trends

What we are seeing in the marketplace and hearing from customers



- Lower and more stable commodity prices (generally), but higher prices and more risk associated with non-commodity components
- Continued pressure for CO₂ measurement and mitigation highlights importance of data management and integrity
- Growing interest in renewable energy for price certainty and competitiveness
- Changing wholesale/retail market rules driving interest in distributed energy resources
- Increased electricity and natural gas usage in transportation sector
- Shifting utility roles in both regulated and deregulated markets
- Interest in monitoring opportunities in developing electricity and renewable energy markets

- Consolidation of supply chains (functionally and geographically)

Enel X organization in North America



Flexibility Solutions



Demand Response



**Energy Storage/
Micro Grids**



**EV Charging
(eMotorWerks)**

Advisory Solutions



**Energy
Procurement
Solutions**



**Energy
Management
Software**



**Utility Bill
Management**



Thank you

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