

enel x

Enel X Company Overview



The undergoing evolution of the energy sector



Decarbonization



Renewables will account for 78% of new generating capacity by 2050

Electrification



Global electricity demand will increase by 60% by 2040

Digitalization



Investment in digital technology will increase by 55% by 2025 (excluding fossil fuel)

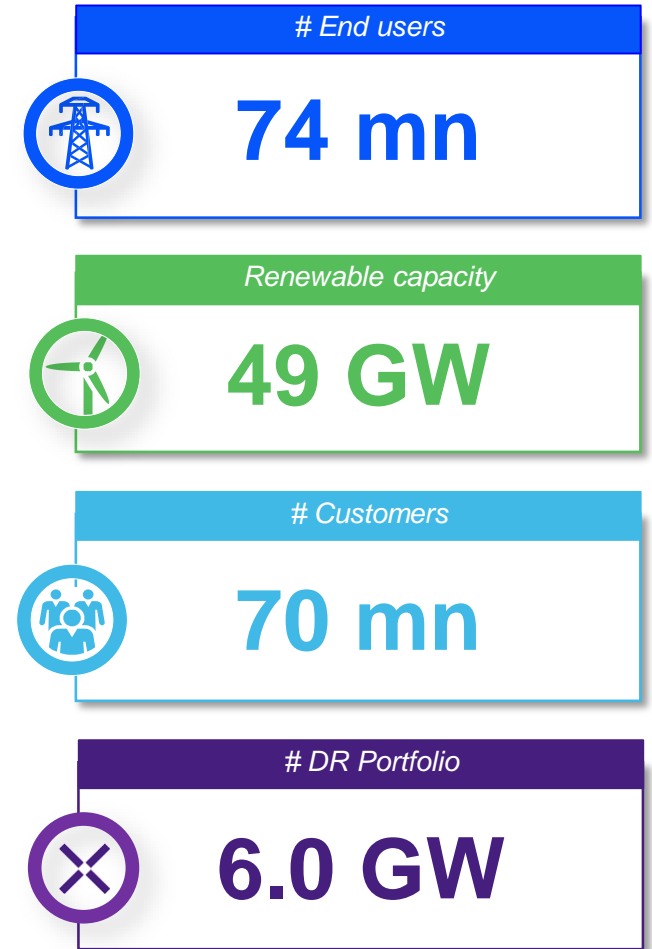
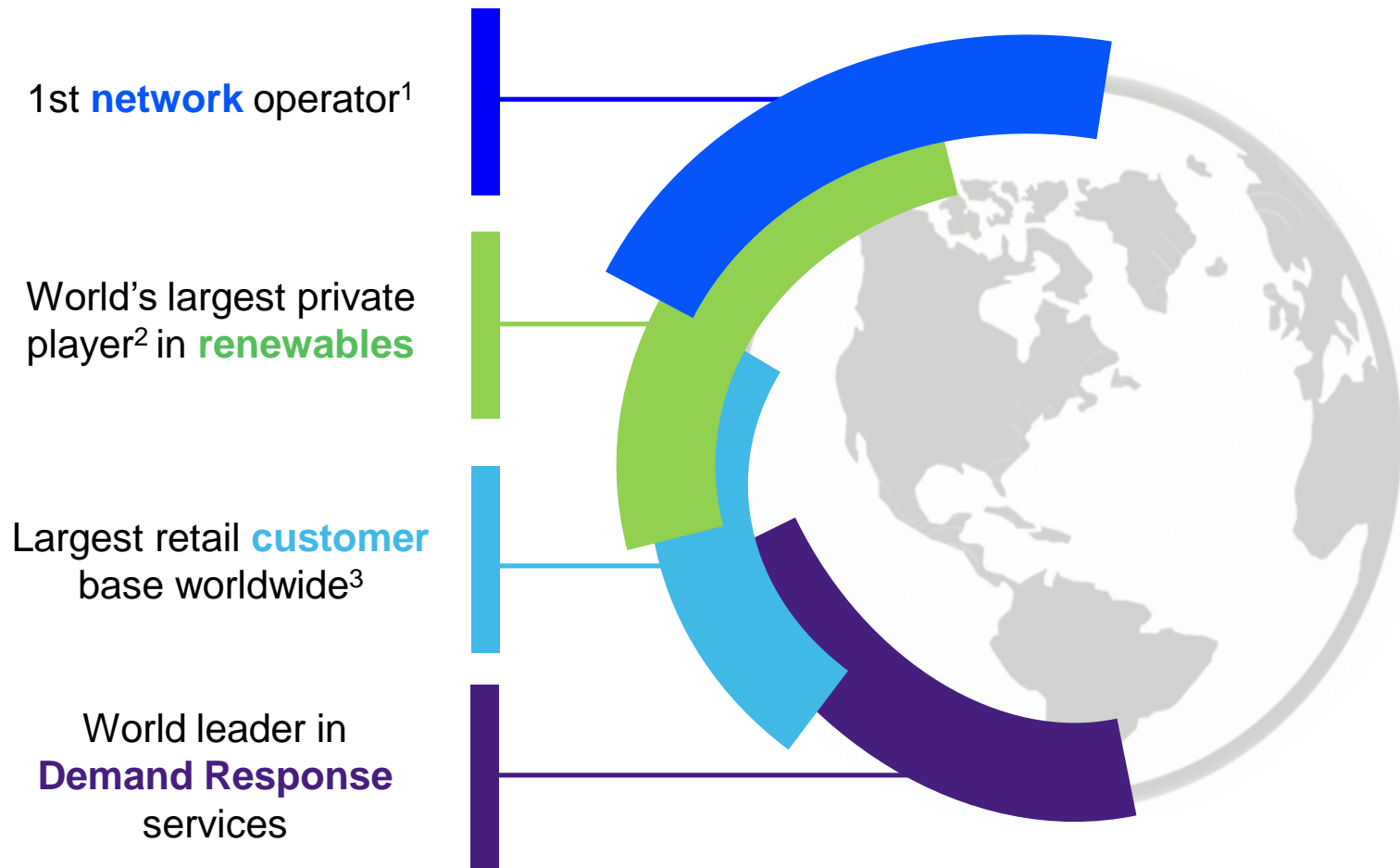
New customer needs



Customers require increasingly tailored services for a recurring engagement

A deep transformation triggered by global trends and digital technology

Facts and figures of parent company Enel



1. By number of end users. Publicly owned operators not included
2. By installed capacity. It includes managed capacity for 3.4 GW
3. Including customers of free and regulated power and gas markets

- ✘ Assist customers in **decarbonization** and in a more efficient use of energy, through **electrification** and **digitalization**
- ✘ Create **new value** through the offer of new products and services

Enel X Strategy and main pillars

The strategy

Short term

- 1. Cost efficiency** particularly on mature businesses and through simplification
- Focus on **growth and cross-selling**, leveraging **quality of service** as a distinctive element
- Development** of the IT operating **platform** and of specialized business platforms

Long term

- 1. Consolidation** of our competitive **positioning**, focusing on platforms and data utilization
- Push towards the **electrification** of **consumption**, in particular for transport and buildings. Monitor **technological advances** to catch new sectors (e.g. industry)

The 4 strategic pillars



PLATFORMIZATION

Standardization of global processes and global business models, enabled by platforms, to **drill-down complexity**



DIGITALIZATION

Strong digital push on all our offered services, as a **distinctive element** to create value and enable analytics



INTEGRATION WITH THE COMMODITY

Integration of our offering with the commodity, to **increase customer loyalty** and accelerate growth



ECOSYSTEM

Creation of a digital platform-based ecosystem around customers, to **become the customers' partner**

Enel X worldwide footprint



North America

- Canada
- USA



South America

- Argentina
- Brazil
- Chile
- Colombia
- Peru



Europe

- France
- Germany
- Ireland
- Italy
- Norway
- Poland
- Portugal
- Romania
- Russia
- Spain
- United Kingdom



Asia

- China
- India
- Japan
- Singapore
- South Korea
- Taiwan



Oceania

- Australia
- New Zealand

Countries

Total: **26**

Enel X Offering



e-City



e-Industries



e-Home



e-Mobility



Financial services



Ultrabroadband

Smart lighting

Demand Response

Onsite generation

Public charging operator

Payments

Fiber to the business

E-Bus

Battery Energy Storage

Home Assistance

Intelligent Charging Solution

PayTech Factory

Fiber to the home

Distributed Energy

Digital Platform

Customer Insights

Smart devices

JuiceNet Suite

Microloans

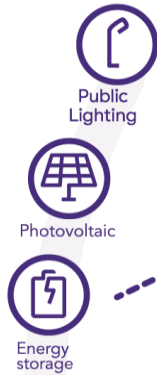
Fiber to the tower

Circular Economy

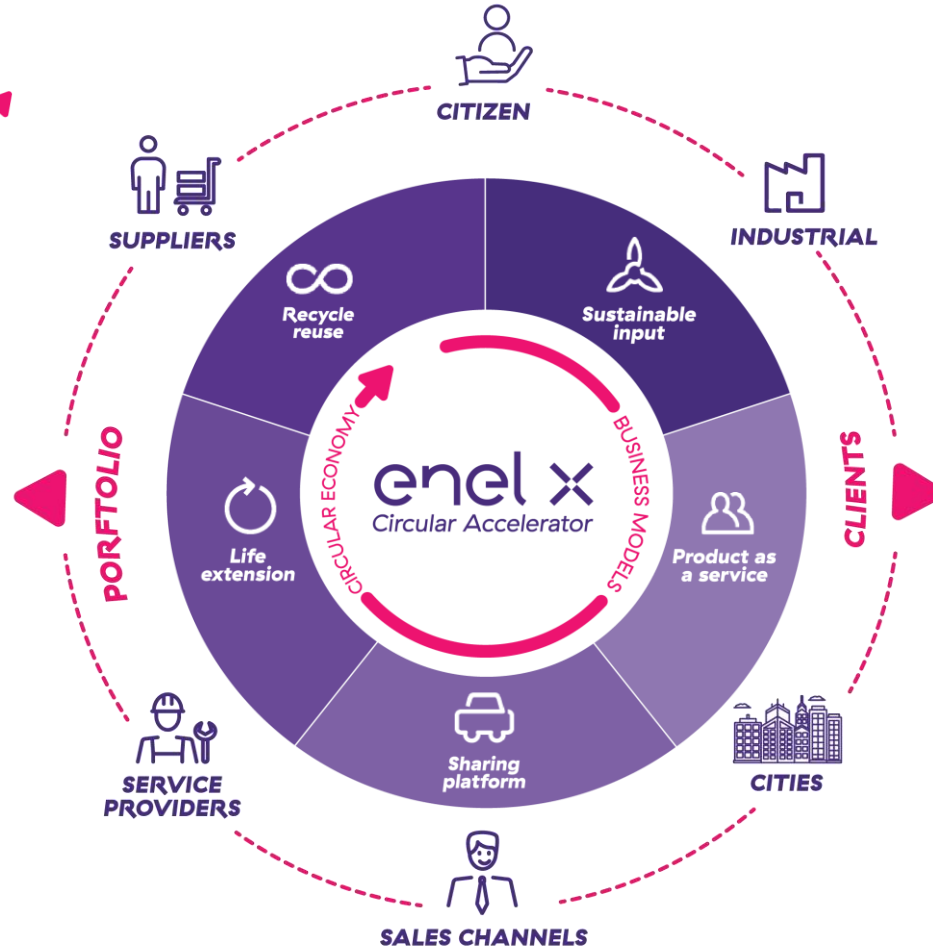
Our boosting approach



CIRCULAR ECONOMY SCORING



ENEL X BOOST CIRCULAR ECONOMY



CIRCULAR ECONOMY REPORT

- 1 Energy Circularity Site Assessment**
- 2 Roadmap for improvements**
- 3 Energy Circularity Sensitivity and Monitoring**



e-Industries

Mission

e-Industries' mission is to enable the global transition to a sustainable energy economy by realizing value for businesses through innovative energy solutions. e-Industries aims to be the preferred energy solutions partner for C&I customers across the globe.

Key figures*

**Demand Response GW
offered**

6.3

**Storage MW
installed**

124

* 2020 Pre-closing figures





CUSTOMER INSIGHTS

Provide digital and AI solutions coupled with customized and specialized energy management advisory through a wide spectrum of subscription packages aimed at generating benefits and reaching sustainability goals.

- > Utility Bill Management
- > Energy Consulting
- > EMS
- > Remote Control
- > Sustainability
- > Product & Systems Optimization

DEMAND RESPONSE

Offer access to more DR programs worldwide to create value for customers by identifying aggregating and monetizing all flexible assets contributed to grid reliability

- > Demand Response
- > Direct Marketing
- > Generation Energy Optimization



DISTRIBUTED ENERGY

Design and turnkey delivery of sustainable and resilient solutions for client energy generation as well as tailored electricity and gas infrastructure suited for clients needs.

- > PV
- > CHP
- > Energy Infrastructure
- > Industrial Equipment
- > Private Lighting
- > Operations and Maintenance

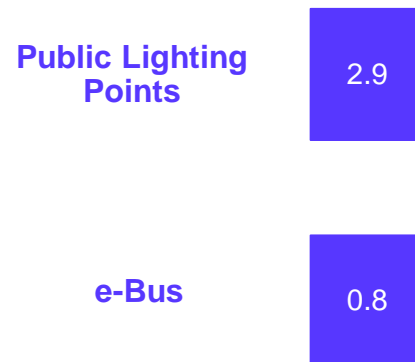
BATTERY ENERGY STORAGE

Offer end to end battery storage solutions to C&I customers and utilities with a revenue optimization enabled by a proprietary platform and applying a variety of both capex intensive and capex light business models

- > Storage Behind the Meter
- > Storage Front of the Meter
- > Storage Software Solutions

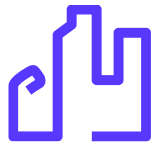
e-City offers to public administrations and municipalities integrated services and connectivity solutions, like the smart lighting services, public electric transportation and the wholesale offer of fiber optic services. Our aim is to become the key infrastructural city player, being the one-stop solution provider for multiple energy related and digital services across the different layers composing the urban context.

Key figures*



* 2020 pre-closing figures





e-City

Portfolio of solutions



SMART LIGHTING SOLUTION

e-City counts **2.9 Mn** of **lighting points worldwide**: traditional lighting becoming smart thanks to efficient LED, lighting control and adaptive lighting technologies.

Architectural lighting: portfolio of solutions targeting architectural “attractions” driving both artistic/decorative enhancement and energy savings



DIGITAL PLATFORM

Digital platform to digitalize solutions enhancing **service quality**, **optimizing operations** and leveraging **asset integration and interconnection**.



NEW SOLUTIONS

e-City offers to governments, public administrations and municipal utilities the most comprehensive portfolio of **energy related digital solutions**.

Including 3 main solutions clusters: public transport electrification, smart buildings and smart city services (digital advertising, city analytics, ...)



e-Home

Mission

e-Home is dedicated to residential customers, with the key objective of designing and delivering innovative Solutions for the management of the Home Ecosystem, leveraging on competitive Offerings, strong Sales Channels, efficient Network & Digital Capabilities. The main goal consists in creating a residential ecosystem based on a Membership Model with M&R as core Service, complemented by HVAC, Green Products and Smart Home as strategic accessories to the ecosystem.

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e-Home

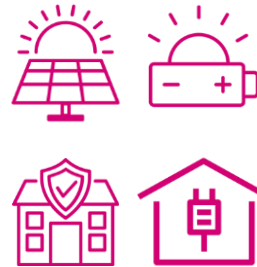
Portfolio of Solutions



ON-SITE GENERATION

Installation, Maintenance and Repair services for Green Energy solutions (**PV, STORAGE, SOLAR**)

- ✓ Guarantee efficiency, sustainability and convenience
- ✓ Promote distributed generation (i.e. prosumer)



SMART DEVICES

Digital solutions (i.e. **SMART HOME**) for managing the Home Ecosystem

- ✓ Guarantee efficiency, sustainability and convenience
- ✓ Manage the entire Home Ecosystem with a single solution



HOME ASSISTANCE

Installation, Maintenance and Repair services for **smart** appliances (**BOILER, AC, WATER HEATING**)

- ✓ Guarantee efficiency, sustainability and convenience
- ✓ Offer integrated solutions for completing the home offer



e-Mobility

Mission

e-Mobility envisions a world moving towards decarbonization, where the mission is to enable energy transition of private and public transportation

Key figures*

Public Charging¹
Points (#k)

80.0

Private
Charging Points
(#k)

94.2



1. Accessible charging points
* 2020 Pre- closing figures



e-Mobility

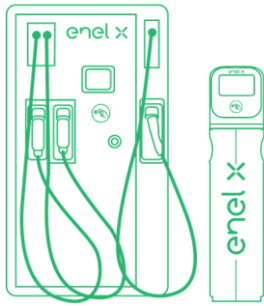
Portfolio of solutions



PUBLIC CHARGING OPERATOR

Public charging infrastructure plan by 2023: installation of 780 K public charging points.

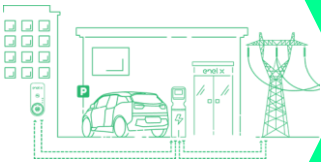
Charging network is made up of Quick (22 kW) Fast (50 kW) and Ultra Fast (up to 350 kW) charging points.



JUICENET SUITE

Integrated cloud-based software suite to: operate public charging stations (**JuiceNet Operator**), manage charging services towards end-customers (**JuiceNet MSP**), manage access right to private and operate stations (**JuiceNet Manager, JuiceNet Set & Charge**), **JuiceNet Home** to optimize residential usage, **JuicePass** to access charging stations

CPO activities *MSP activities* *Ancillary services*



INTELLIGENT CHARGING SOLUTIONS

“**Juice family**”, a complete, modular and scalable charging stations ready to grow in tandem with market: **JuiceBox compact** and **intuitive** wallbox for residential and commercial usage; **JuicePole, destination charger** and **JuicePump** available for implementation of the public charging infrastructure

Modular, scalable turn-key solutions designed for individuals, companies and government organisations



Enel X Financial Services

Mission

Offering innovative **financial, insurance and payments services** to **families and individuals** reaching **2 million users** in **Europe** in 3 years, and re-structuring and scaling up our business in **Latin America**, starting from our proven position in Colombia reaching **3 million customers**.

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Enel X Financial Services

Portfolio of solutions



PAYMENT

We offer a **payment solution**, that is a light bank account that enables digital payment services from App and from a physical prepaid card for the B2B and B2C segments. This solution will enable users to make payments, manage finances consciously and aggregately. The solution is empowered by physical touchpoints.

“We” option for families and teens

Partnerships with Enel Ecosystem

MICROLOANS

We are offering a pool of services for SME and B2C customers. We offer a “open loop” credit cards with a partnership with Scotiabank Colpatría, leveraging Enel-Condensa’s capability to manage credit card payments and bills.



PAYTECH FACTORY

We are partnering with other business in order to provide users with tailored payment solutions that enable acceptance and payment services.

Building a strong pipeline of B2B partners



UBB

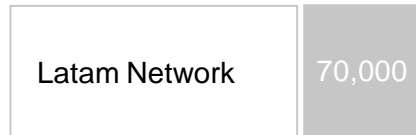
Mission

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UBB offers to the TMT market segment a portfolio of neutral connectivity services as a wholesale infrastructure operator. Our goal is to create value with fiber optic networks, by leveraging at best the synergies with the Enel electrical infrastructure

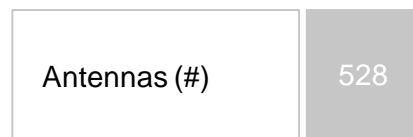
Key figures*

Total fiber Km



ufinet

Towers



ufinet

FTTH



ufinet



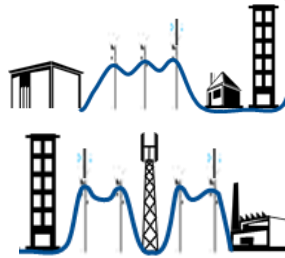
* 2019 closing figures



FIBER TO THE PREMISES

UBB provides wholesale connectivity services for the enterprise:

1. Dark fiber services: a dedicated point-point fiber pair between endpoints
2. Capacity circuit: a «broadband service» with committed connectivity speed between endpoints



FIBER TO THE HOME

We offer operators wholesale **Passive** or **Active** services to connect users (residential or SME) to state-of-the-art FTTH network, providing high-speed connectivity of 1Gbps and beyond. Hosting capability and edge service also available.



TOWERING SOLUTIONS

A dedicated set of mobile services for 4G densification and 5G introduction:

1. Hosting services
2. Site searching and permitting
3. Antennas configuration and connectivity

Thank you

www.enelx.com

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