



VI Edizione

Le performance delle utility italiane

Analisi delle 100 maggiori aziende
dell'energia, dell'acqua, del gas e dei rifiuti

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Milano, 22 febbraio 2018





Agenda

1. Perché
Top Utility?

2. Le TOP
100 utility
in Italia

3. Il modello

4. I risultati
dell'analisi



Agenda

1. Perché Top Utility?

2. Le TOP 100 utility in Italia

3. Il modello

4. I risultati dell'analisi

Performance economico-finanziare

Performance operative

Comunicazione clienti e territorio

Sostenibilità

Investimenti ricerca e innovazione



Perché Top Utility?

Analizzare trend ed evoluzione del settore

Valutazione integrata delle performance delle principali utility italiane

Evidenziare best practices e aree di miglioramento

Individuare e premiare le eccellenze



Le TOP 100 utility in Italia

Top 100 utility italiane per fatturato

100% delle aziende energetiche ha ricavi > 1 mld €

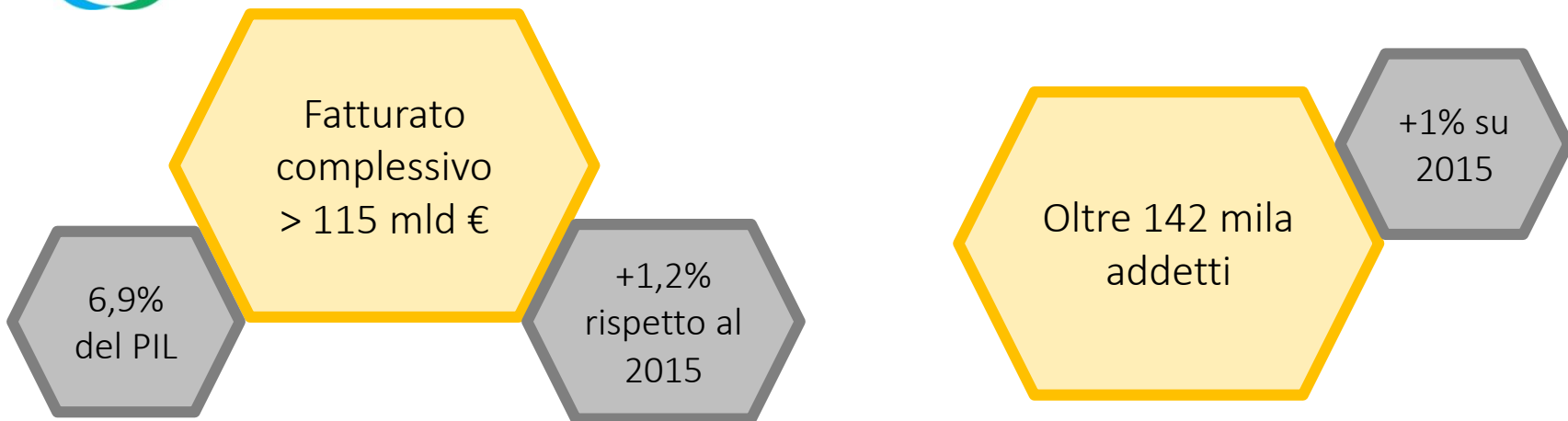
Prevalenza di piccole e medie imprese

Multiutility e idrico tipologia più presente

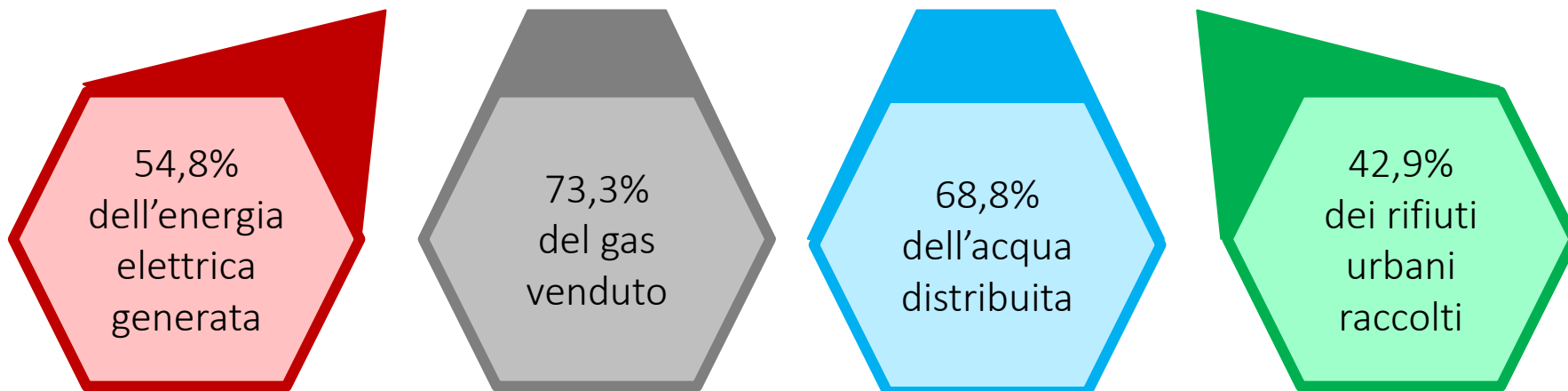
Aree di attività	Classi di fatturato (euro)				Totale
	> 1 mld	> 500 mln < 1 mld	> 100 mln < 500 mln	< 100 mln	
Energia elettrica	9	0	0	0	9
Gas	0	0	3	0	3
SII	0	1	10	21	32
Servizi ambientali	0	1	6	17	24
Multiutility	5	2	11	14	32
Totale	14	4	30	52	100



Le TOP 100 utility in Italia



Le aziende analizzate coprono in Italia:





Il modello VIP - Valutazione Integrata delle Performance

Valutazione articolata e integrata

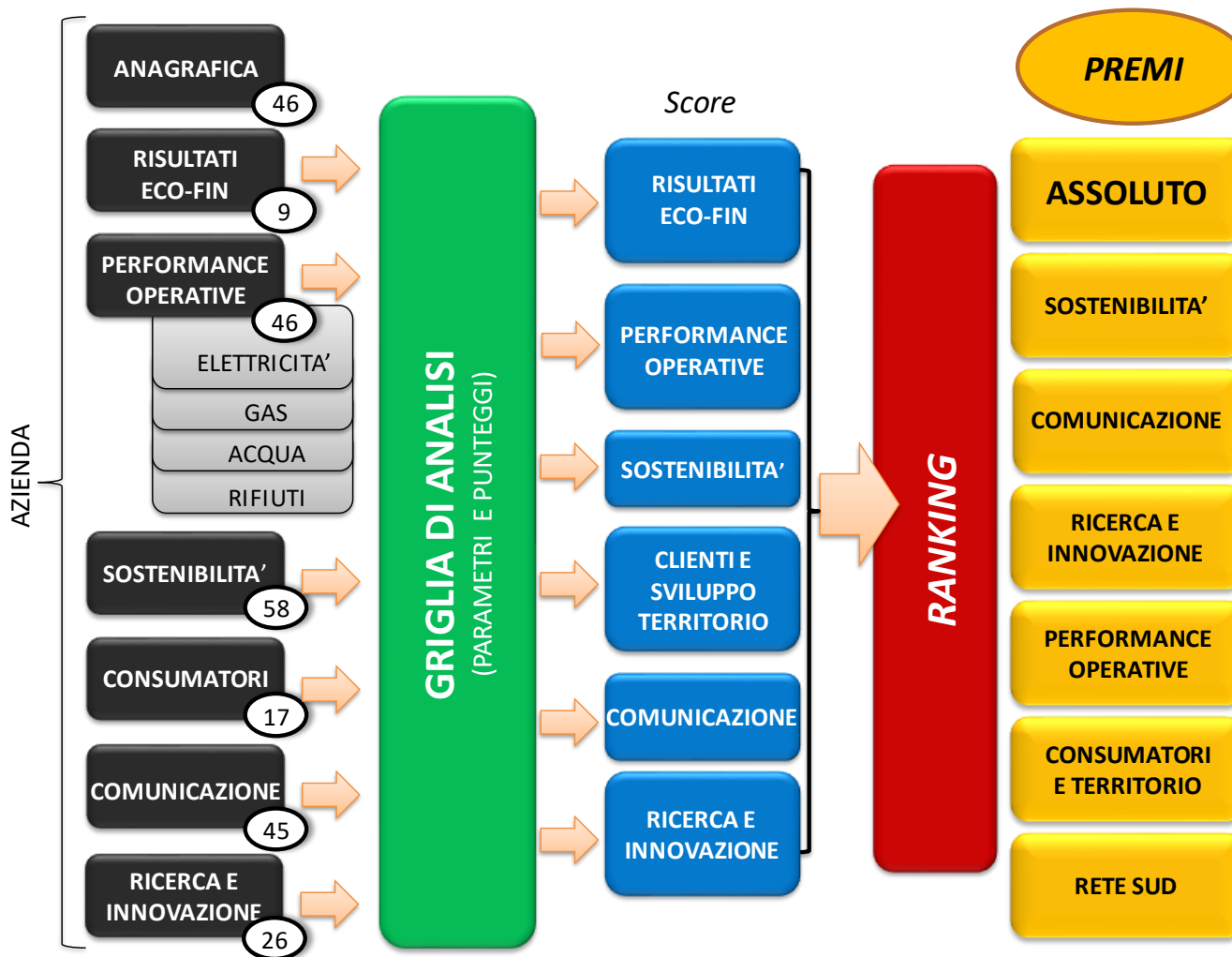
Open source e informazioni dirette

201 parametri valutati

6 aree analizzate

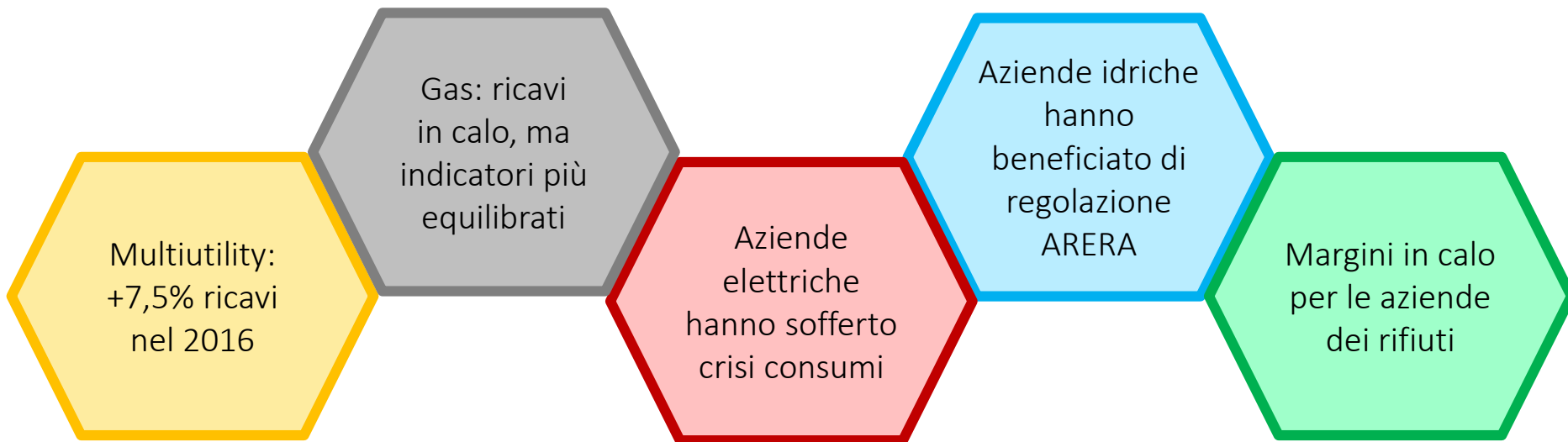
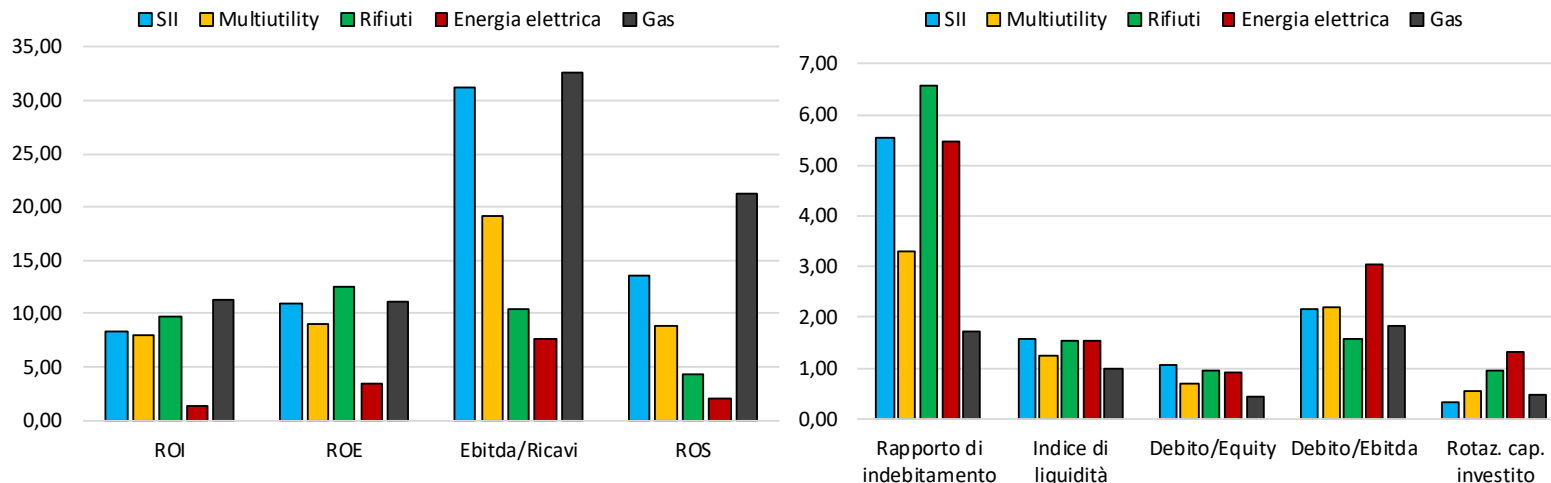


Il modello VIP - Valutazione Integrata delle Performance





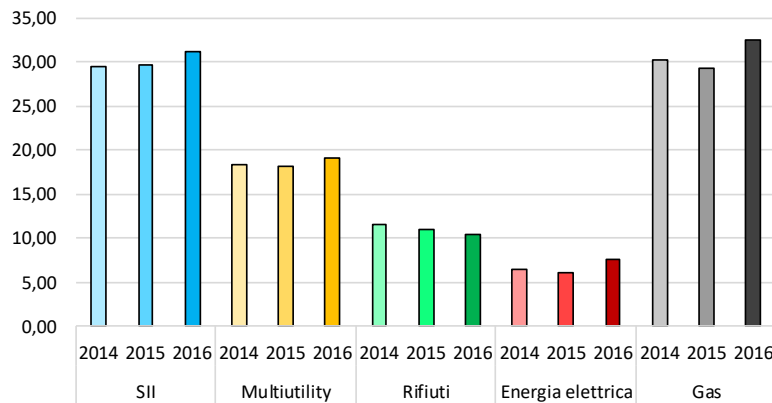
Le performance economico-finanziarie



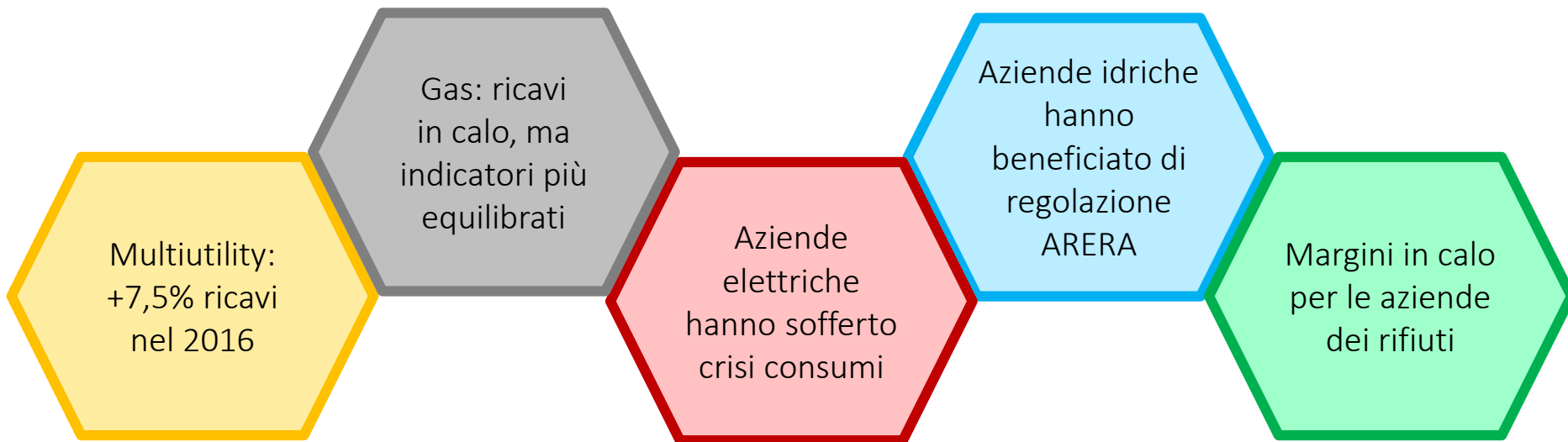
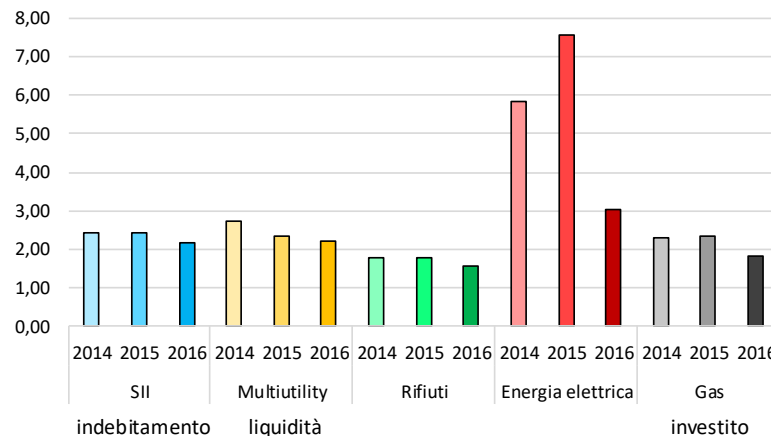


Le performance economico-finanziarie

Ebitda/Ricavi

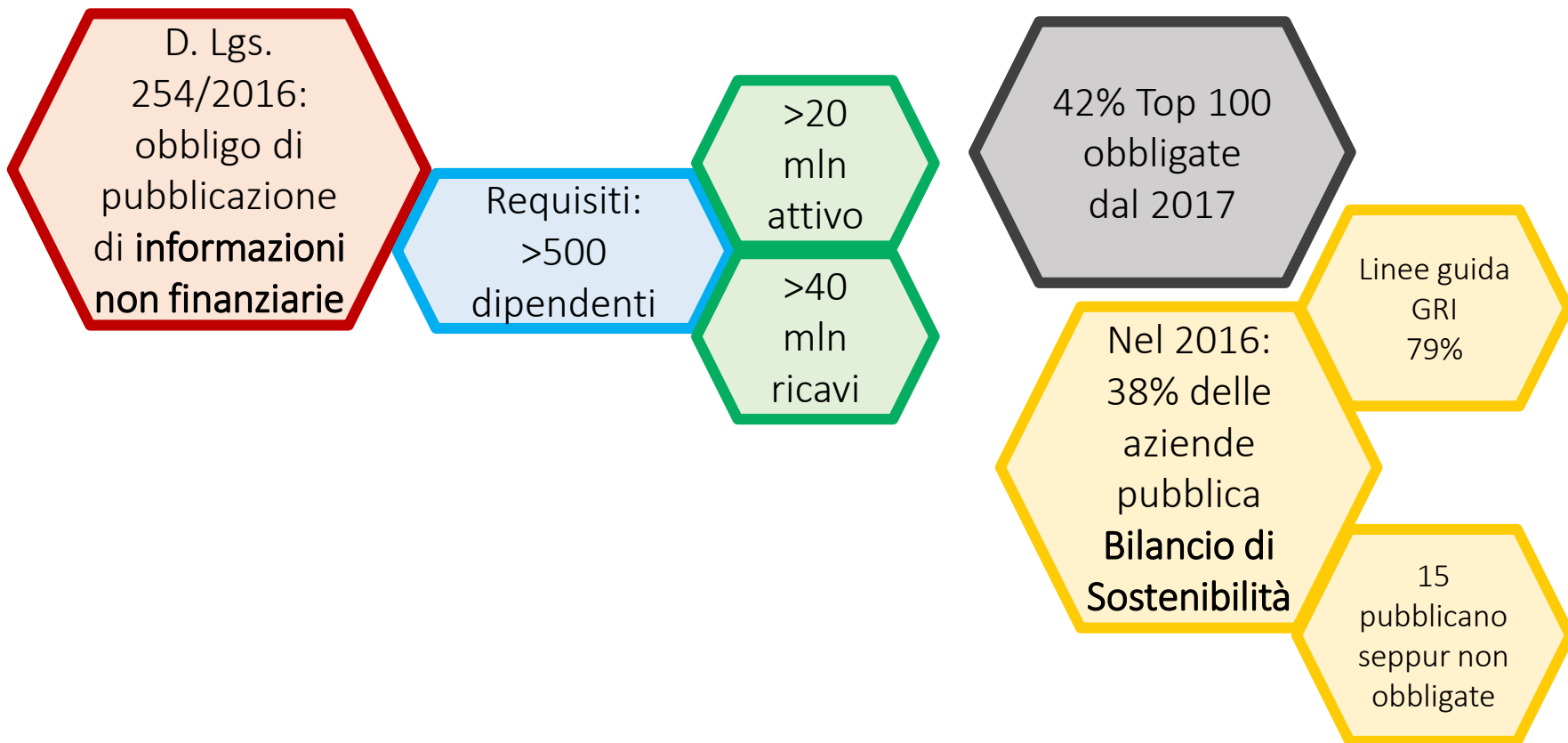


Debito/Ebitda





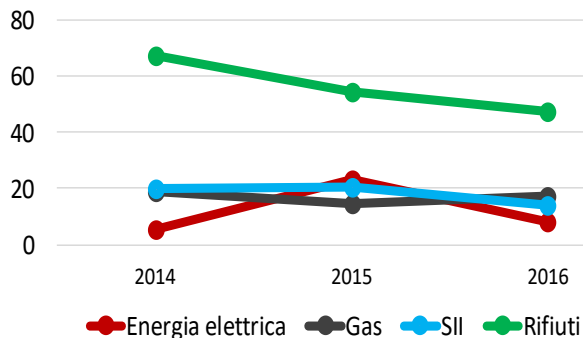
La Sostenibilità



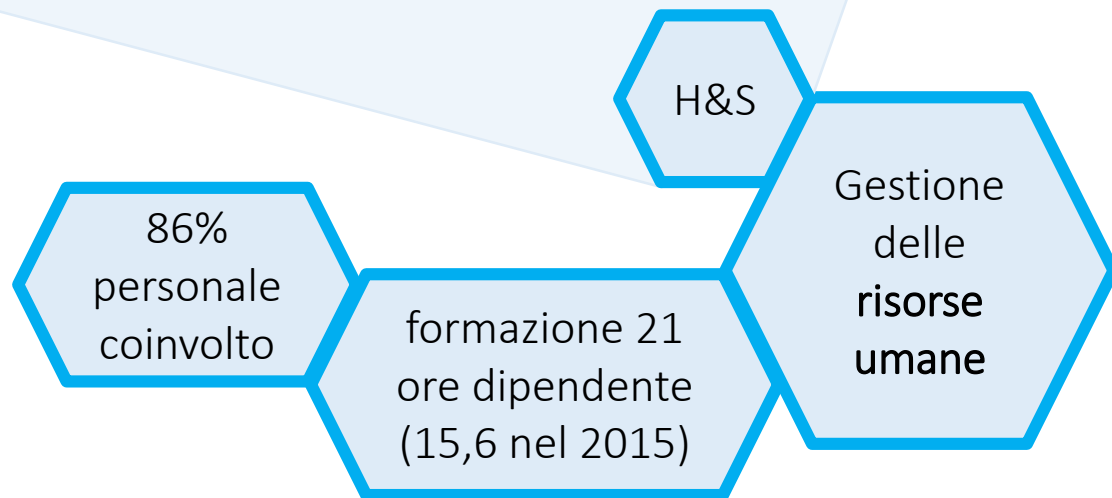
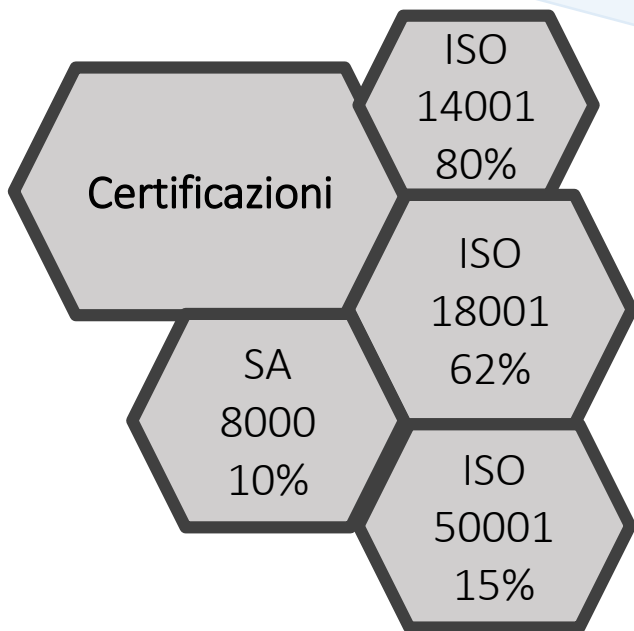
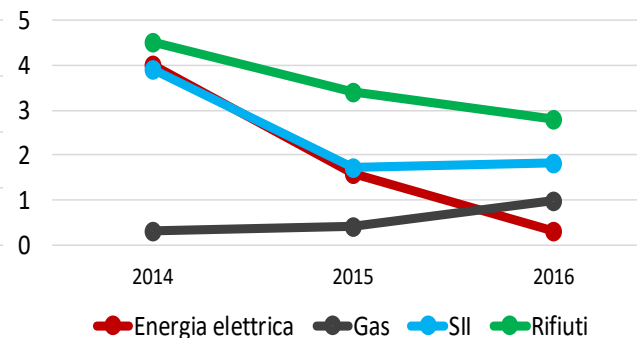


La Sostenibilità

Indice di frequenza infortuni (IdF)

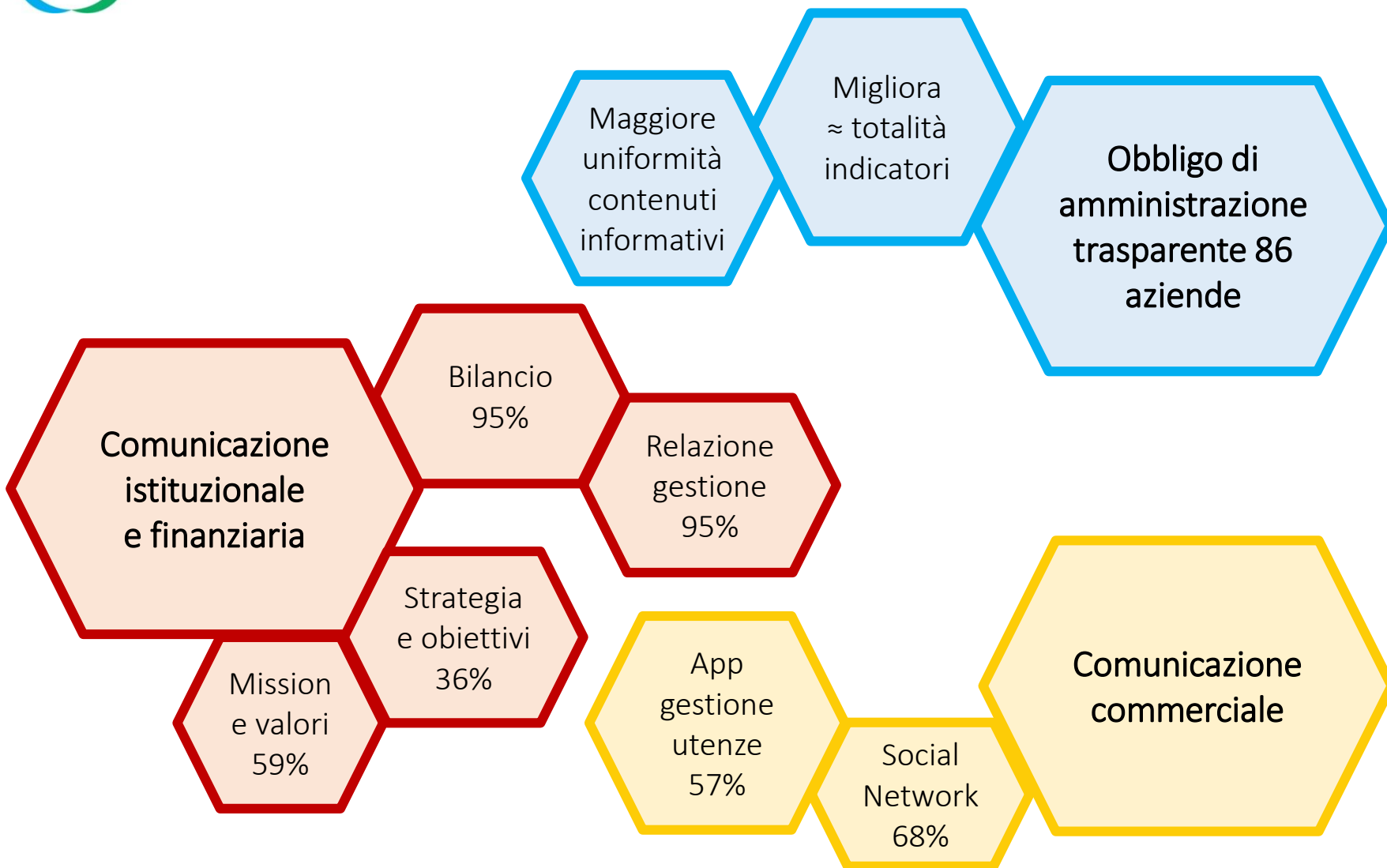


Indice di gravità infortuni (IdG)



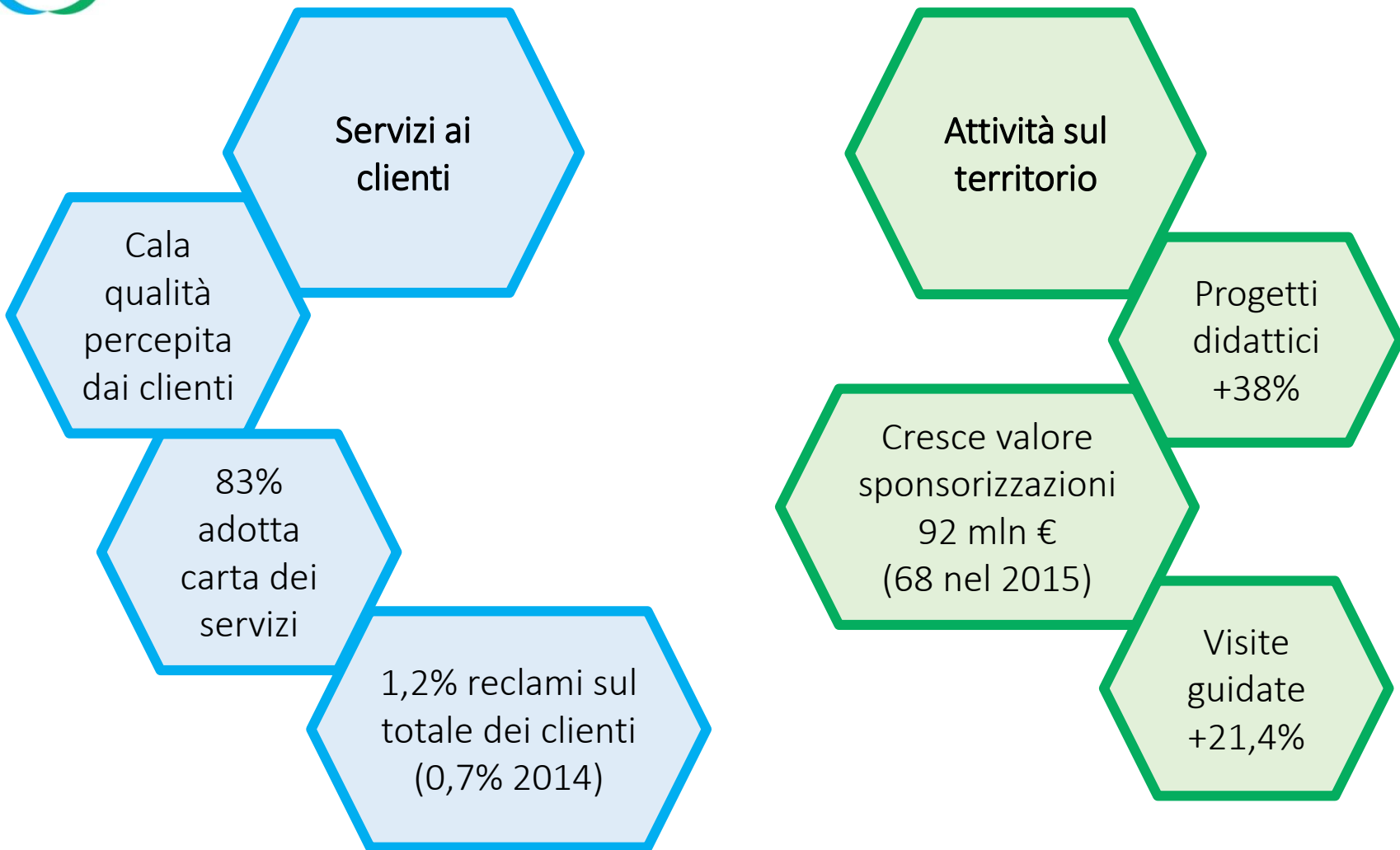


Comunicazione



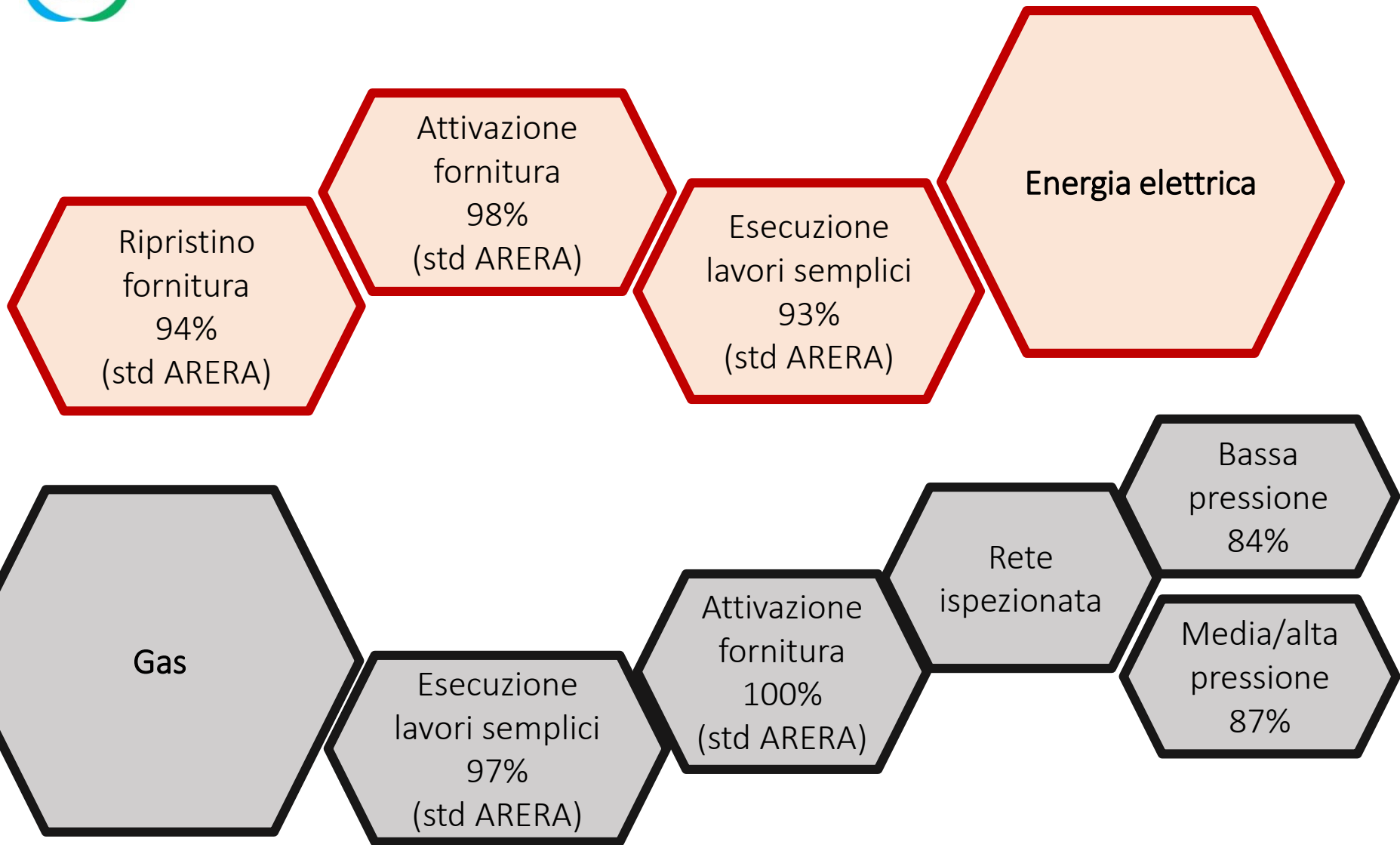


Clienti e territorio



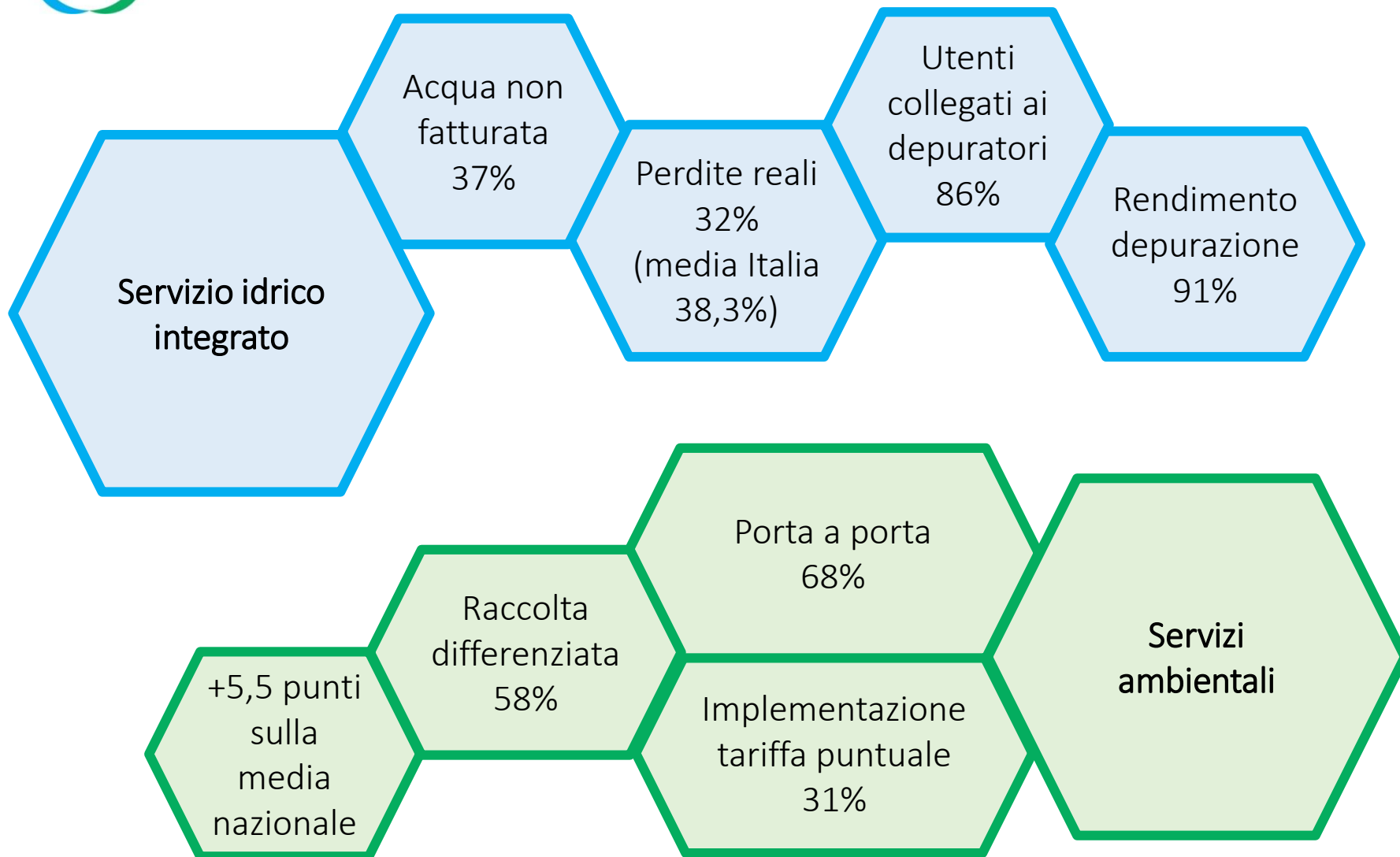


Performance operative



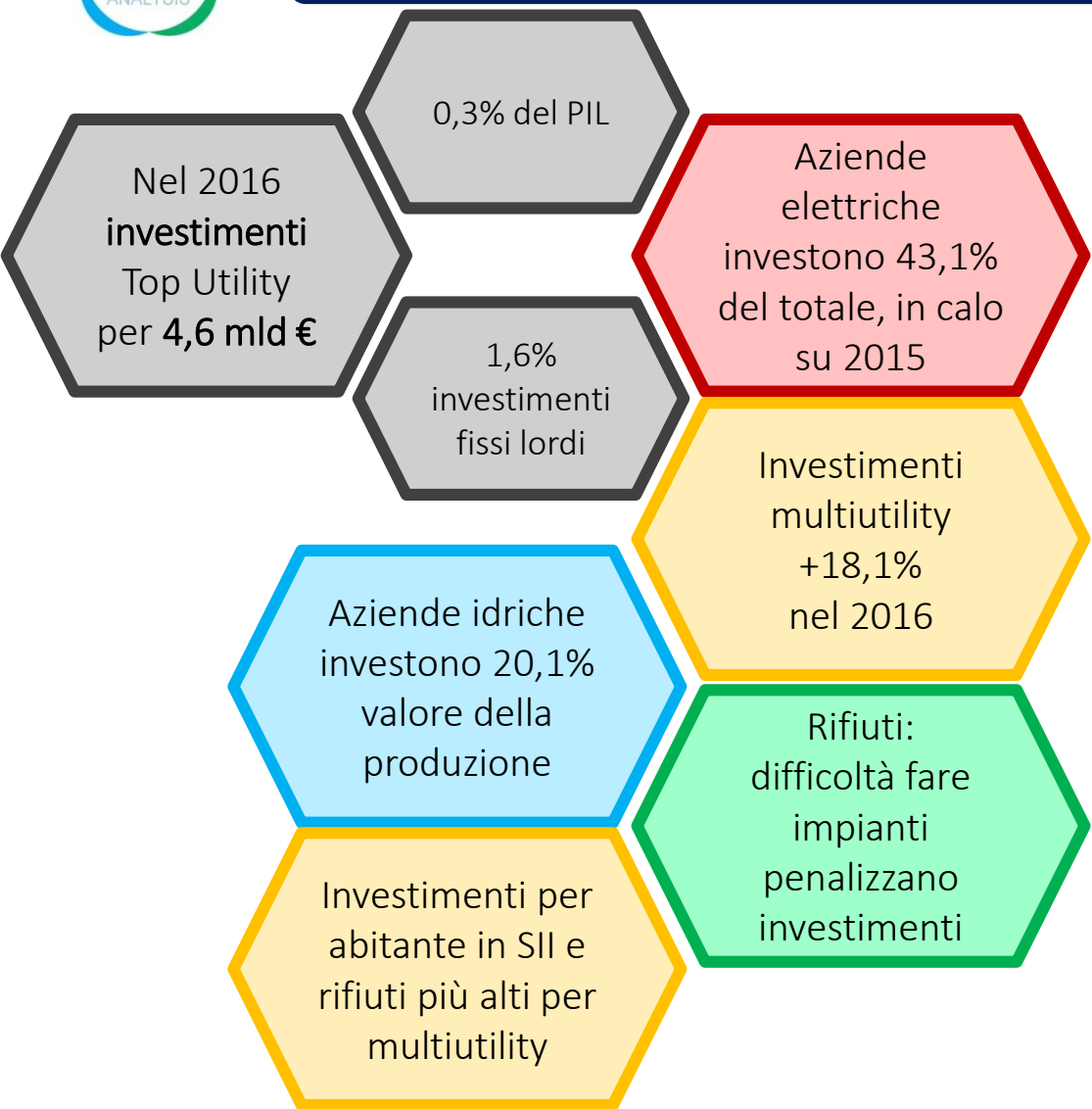


Performance operative

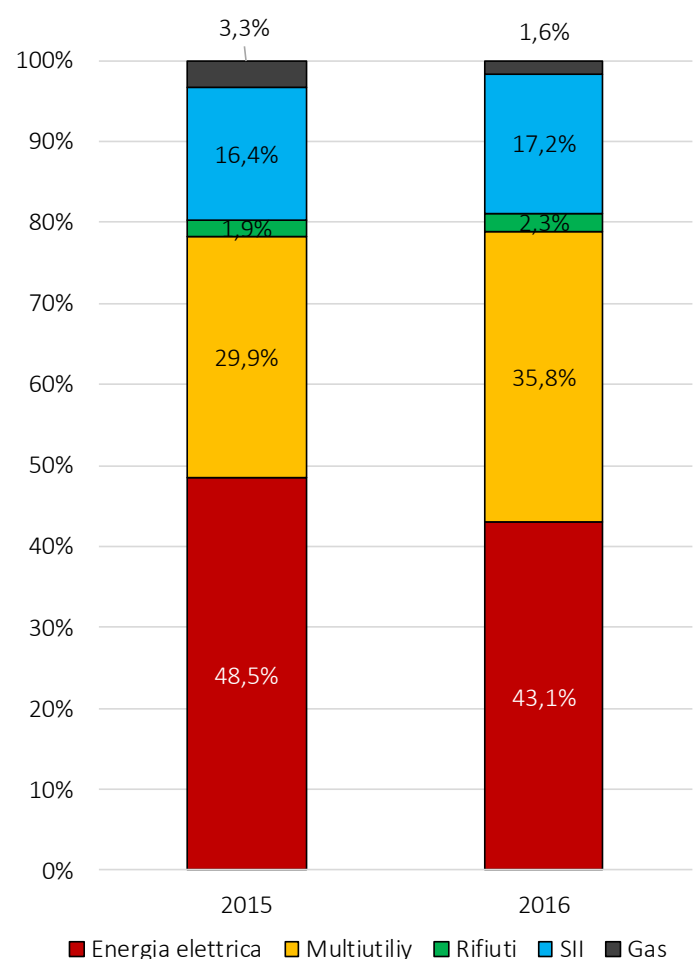




Gli investimenti

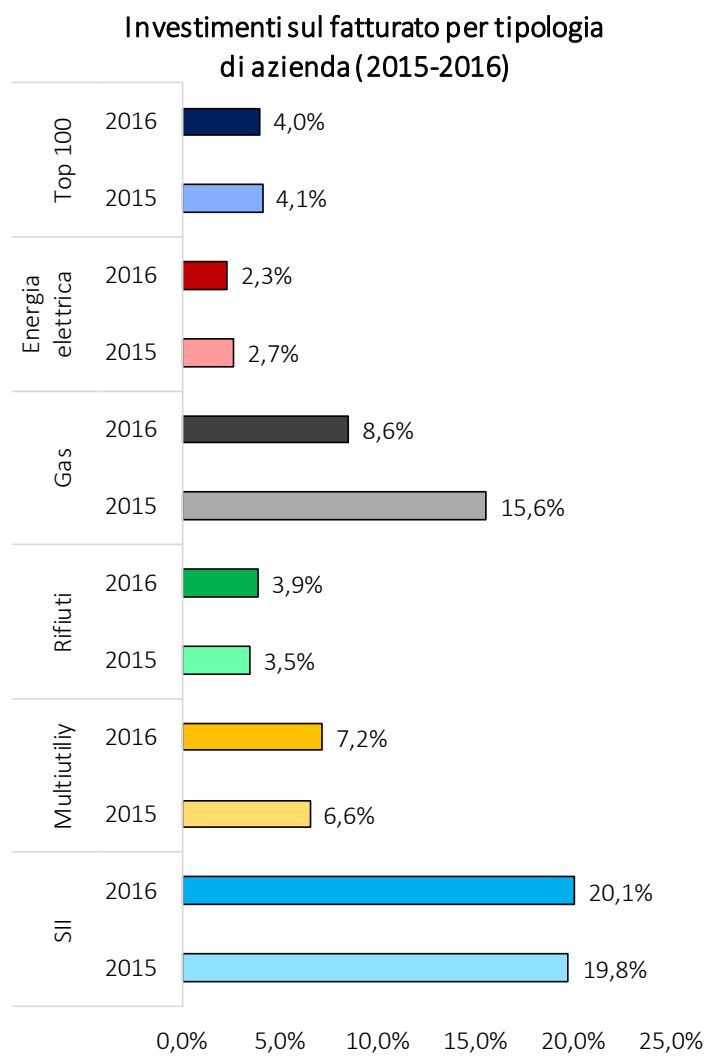
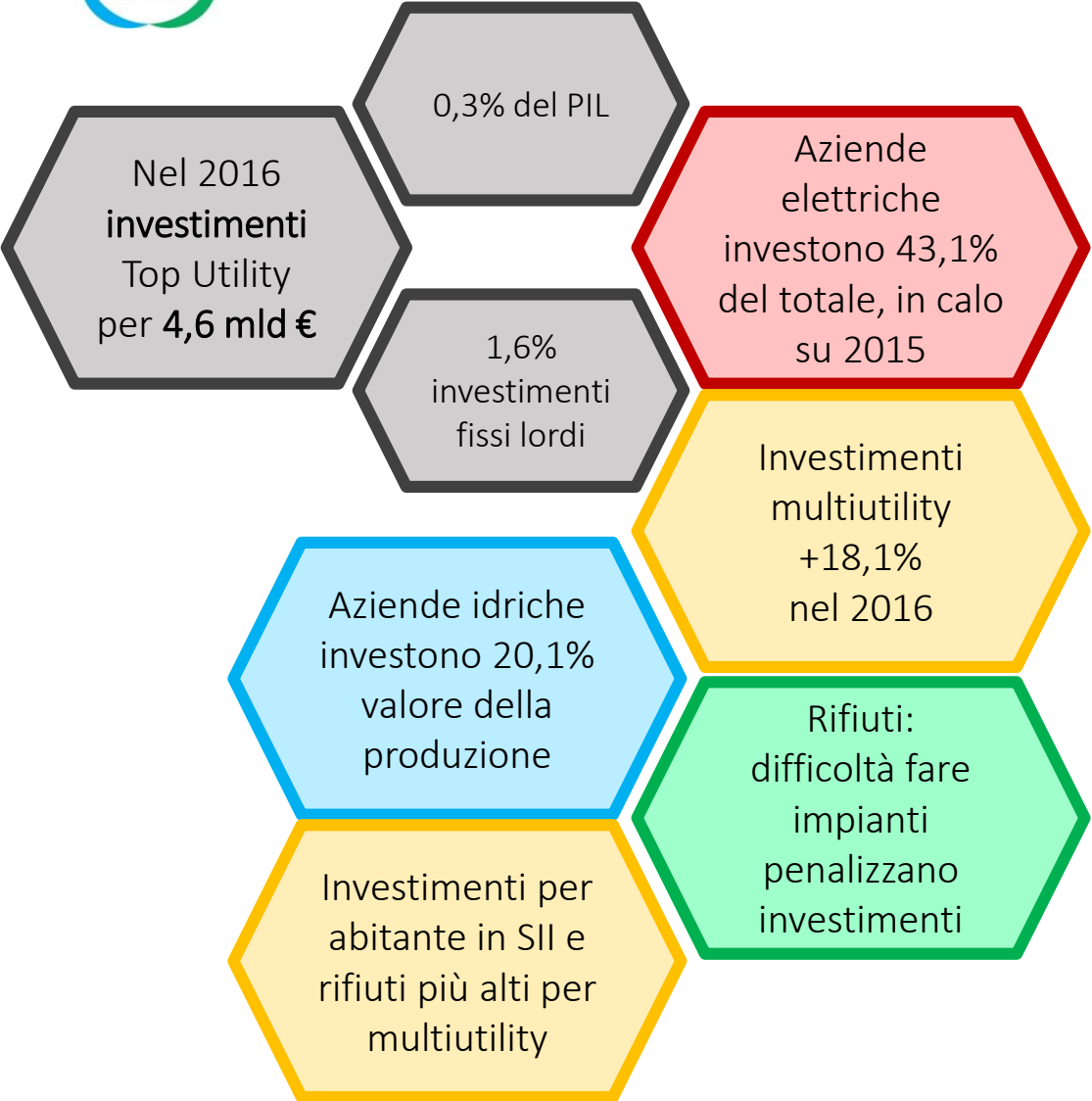


Breakdown degli investimenti per tipologia di azienda (2015-2016)



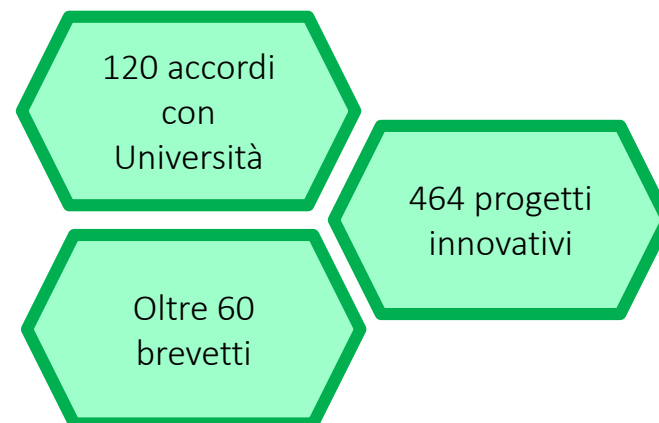
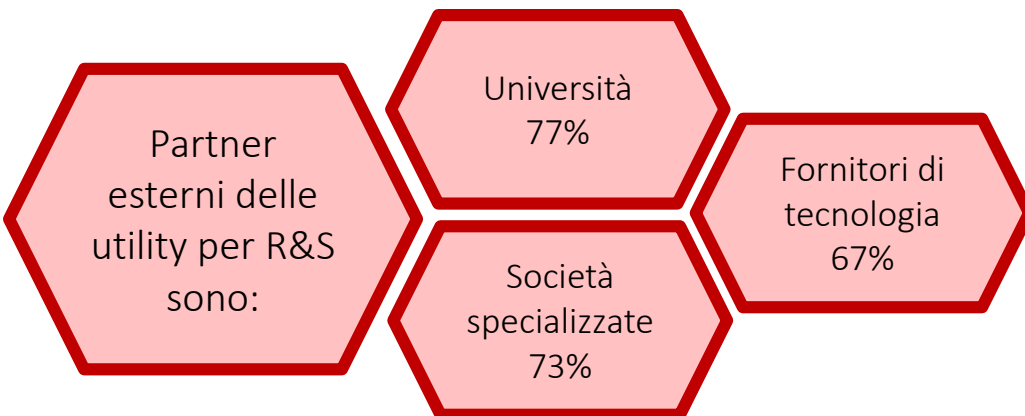
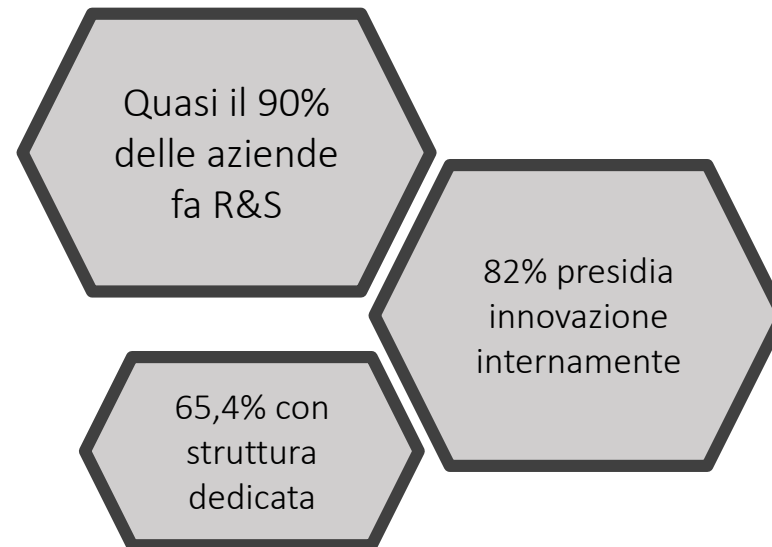
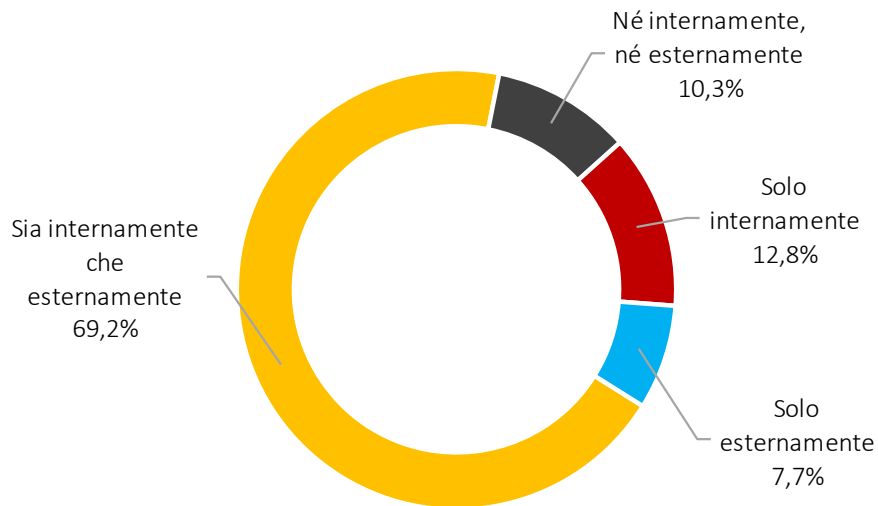


Gli investimenti



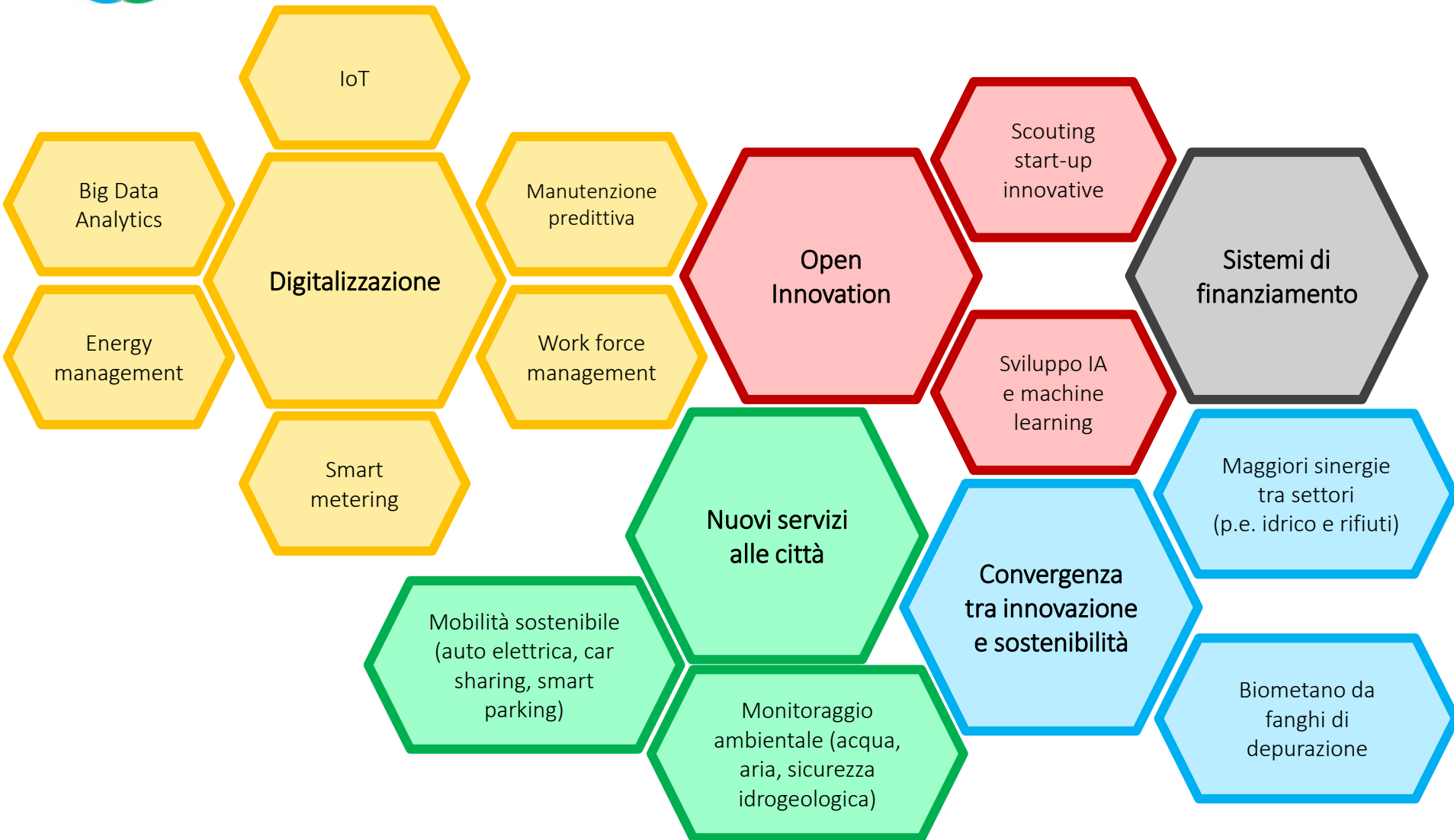


Il presidio dell'innovazione





Le aree di ricerca



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