




2017 Preliminary Results Presentation

April 5, 2018

ContourGlobal

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FY 2017

Preliminary Results Presentation

HAGN 47MW Wind Park (Austria)

2017 Year End;
A Strong Set of Results

SOLID OPERATIONAL PERFORMANCE

- ✓ Industry Leader in Health and Safety with **0.03 LTI Rate**
- ✓ **94% Combined Average Availability** Across the Fleet in Line or Close to Top Decile Targets for both Thermal and Renewable Segments

ROBUST FINANCIAL RESULTS

- ✓ **$1bn** **Total Revenue** +13%
- ✓ **$513m** **Adj. EBITDA** +17%
- ✓ **$256m** **FFO (1)** +23%

STRONG BALANCE SHEET

- ✓ **$390m** Liquidity at Parent Level (2)
- ✓ **4.1x** year-end Net Leverage Ratio

(1) Funds From Operations is defined as Cash Flow from Operating Activities excluding changes in working capital, less interest paid, less maintenance capital expenditure, less distribution to minorities. Funds from Operations is a non-IFRS measure

(2) Pro-forma for 250MW Spanish CSP acquisition expected to close in Q2 2018, subject to customary and transaction specific conditions

Successfully Delivering on our Near-Term IPO Targets

ANNUAL RESULTS AS EXPECTED

- ✓ **$513m** Adjusted EBITDA within $500-$520m guidance
- ✓ **4.1x** year-end Net Leverage Ratio as of Dec 17 within 4.0-4.5x guidance
- ✓ **$17.5m** stub period dividend, 2.6 cents (USD) per share – in line with commitment at IPO

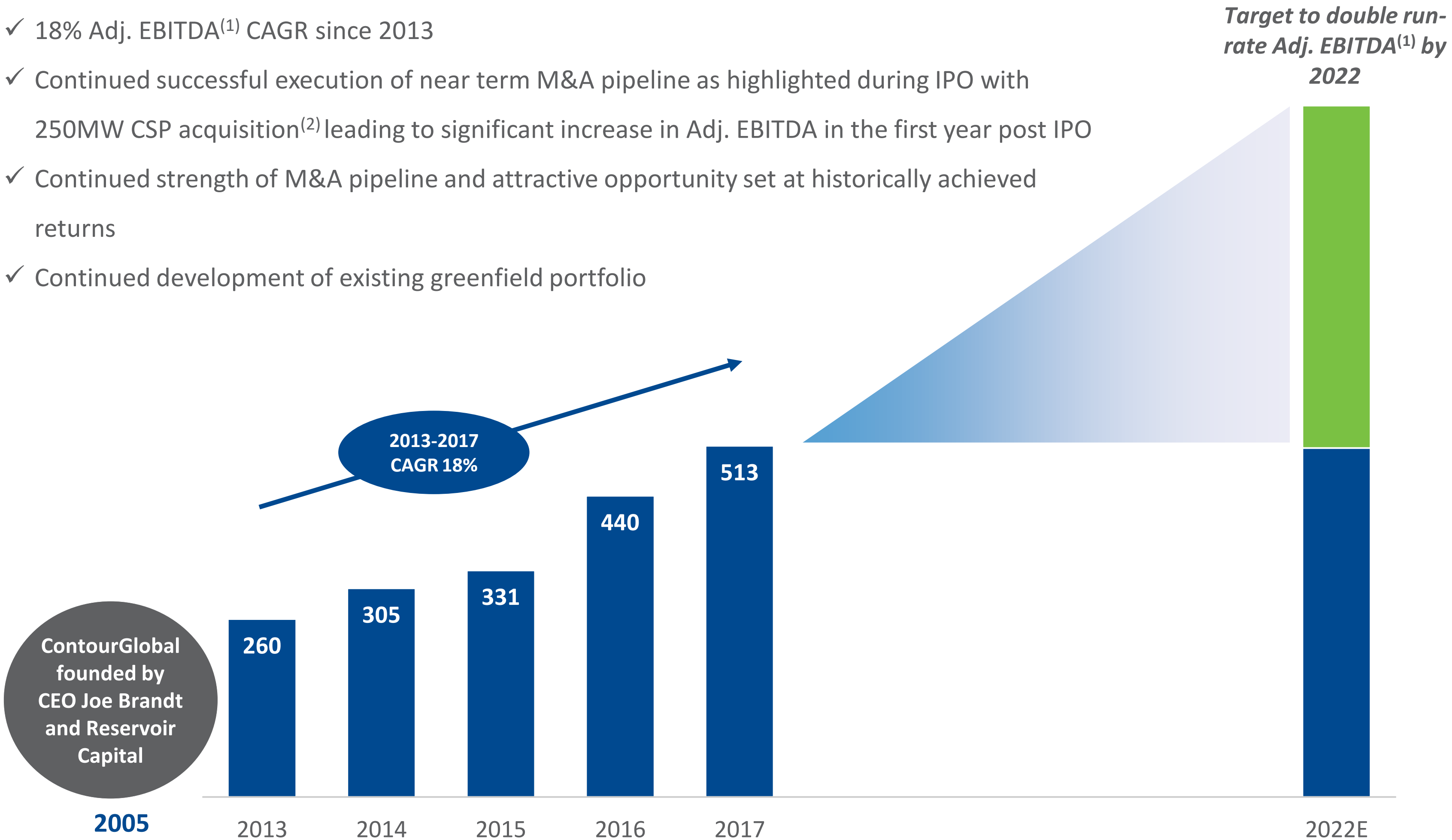
RAPID EXECUTION ON GROWTH STRATEGY

- ✓ **On track for Kosovo Financial Close** after Commercial Close Signed in Dec 2017 as announced at IPO
- ✓ Continuing consolidation in **European Solar Portfolio Roll-Up** with **40MW added** [(1)] in 2017 consistent with strategy communicated at IPO
- ✓ **250MW** Highly Cash Generative CSP Portfolio Acquisition in February 2018 [(2)], part of the Renewable Opportunities listed at IPO

(1) 19MW closed in December 17 and another 21MW Solar Portfolio acquisition signed in December 2017 (of which 14.6MW closed in March 2018, the remaining 6.8MW expected to be closed in Q2 2018)
(2) 250MW Spanish CSP acquisition expected to close in Q2 2018, subject to customary and transaction specific conditions

Accelerating the Timeframe for Doubling Adjusted EBITDA

- ✓ 18% Adj. EBITDA[1] CAGR since 2013
- ✓ Continued successful execution of near term M&A pipeline as highlighted during IPO with 250MW CSP acquisition[2] leading to significant increase in Adj. EBITDA in the first year post IPO
- ✓ Continued strength of M&A pipeline and attractive opportunity set at historically achieved returns
- ✓ Continued development of existing greenfield portfolio

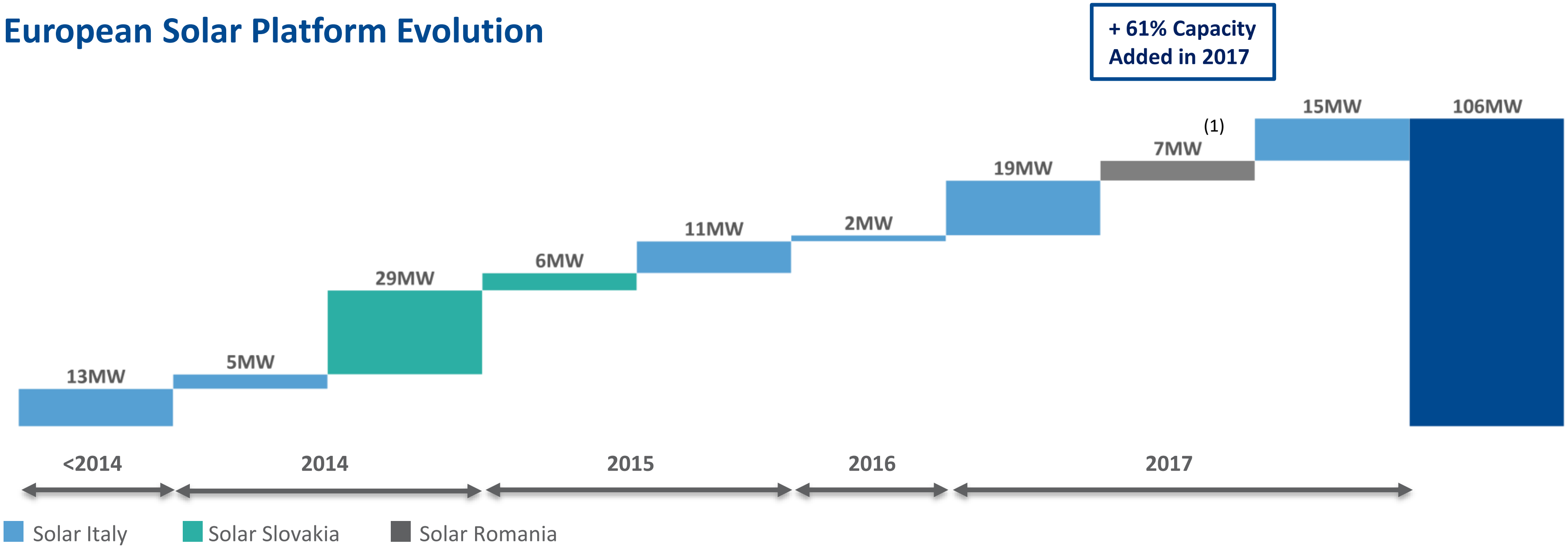


(1) Adjusted EBITDA is a non-IFRS measure; (2) expected to close in Q2 2018, subject to customary and transaction specific conditions

Continued Attractive Operations Led Platform Expansion in Europe: 40MW Added in the past three months

4 Dec 17	Successful closing of 19MW solar Italy assets
23 Dec 17	22MW Italian and Romanian solar assets signed, of which 15MW successfully closed in March 2018 and 7MW expected to close in Q2 2018

European Solar Platform Evolution



(1) *Expected to be closed in Q2 2018*

Significant Progress on Attractive Austria Repowering

Preparatory works for decommissioning of Velm-Götzendorf

Summary

- ✓ Austria wind business consists of 7 wind farms totaling 150 MW
- ✓ Austrian regulation offers incentives to 'Repower' existing wind farms and receive 13-year FiT
- ✓ We expect to repower 4 wind farms (listed in table below), increasing capacity from 71MW to 83MW and increasing production by 50%
- ✓ Two plants (Velm-Gotz and Scharndorf A) signed FiT in Q1 2018. Construction to commence in Q2/Q3 2018, with planned COD in Q1/Q2 2019
- ✓ Three additional plants (Berg, Traut. and Scharndorf B) to finalize FiT and development phase between Q4 2018 and Q4 2019, with COD expected by Q4 2021

SITE		Capacity After Repowering (MW)	current Generation(1) (MWh)	new Generation(1) (MWh)	Generation increase (%)
Phase I	Velm-Götzendorf	11.8	20,030	32,862	64%
	Scharndorf Ia	15.7	22,653	44,458	96%
Phase II	Berg I&II	18.0	41,134	54,703	33%
	Trautmannsdorf I	20.8	36,250	67,400	86%
	Scharndorf Ib	16.4	34,691	41,955	21%
Total Wind Repowering Austria		**82.7**	**154,758**	**241,378**	**56%**

(1) Based on P65 Generation

M&A: Substantial 250MW Spanish CSP acquisition
Announced February 2018

Highlights

- 250MW portfolio of 5 operating assets in Spain bringing Europe Solar Platform to 356MW
- €962m total Enterprise Value with a 2017 pre-acquisition Adj. EBITDA of €110
- Closing expected by Q2 2018, subject to customary and transaction specific conditions

Long-term Regulated Cash Flows

- 70% of the total revenue coming from a fixed capacity based payment - limited wholesale price and resource exposure
- Average remaining regulatory lifetime of 18 years
- Initial Adj. EBITDA forecast provided in shareholder circular for the first full year post acquisition is \$130m (1)

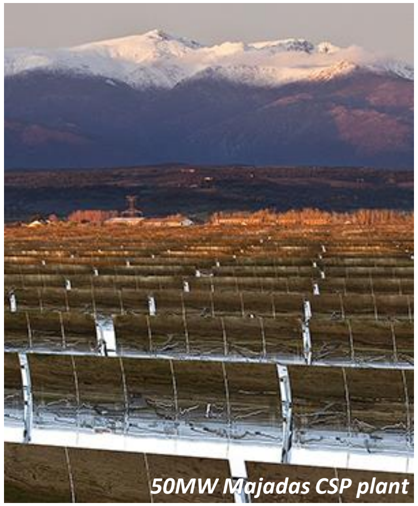
Attractive Project Financing

- Up to €670m loan agreement with maturity December 2036 (19-year tenor) underwritten by Goldman Sachs (2)
- Attractive financing cost at mid to high 3% (2.50% margin per annum)
- Investment grade facility (Moody's)

Meaningful operating synergies

- Ability to reduce OPEX and increase availability by implementing CG's best-in-class O&M performance
- Good fit with existing Spanish Thermal business
- Good fit with our Solar and Thermal operating expertise

50MW Orellana CSP plant



50MW Majadas CSP plant

(1) At 2017 EUR/USD FX rate of 1.13 corresponding to €115m

(2) The final amount utilized is expected to vary by between 2% and 3%, depending on the prevailing EUR swap rates at the funding date

Kosovo Commercial Close Achieved in December 2017
On track for Financial Close

- ✓ **PPA and related documents signed with Kosovo Government on 20 Dec 2017**
- ✓ **500 MW gross capacity, near Pristina, Kosovo**
- ✓ **PPA duration 20 years after COD**
- ✓ **Capex c.US$1.5bn**
- ✓ **Financial close and start of construction expected late 2018 / early 2019**

Projects Agreements Signing Ceremony

From left to right: Arben Gjukaj (Managing Director of KEK, Kosovo); Joseph C. Brandt (CEO, ContourGlobal); Ramush Haradinaj (Prime Minister, Republic of Kosovo); Valdrin Lluka (Minister of Economic Development, Republic of Kosovo)

2. Operations

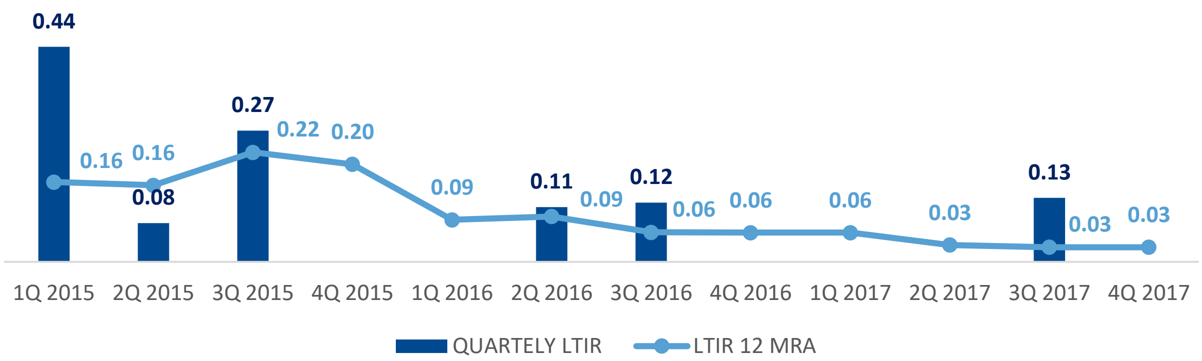
Karl Schnadt

Executive Vice President & Chief Operating Officer

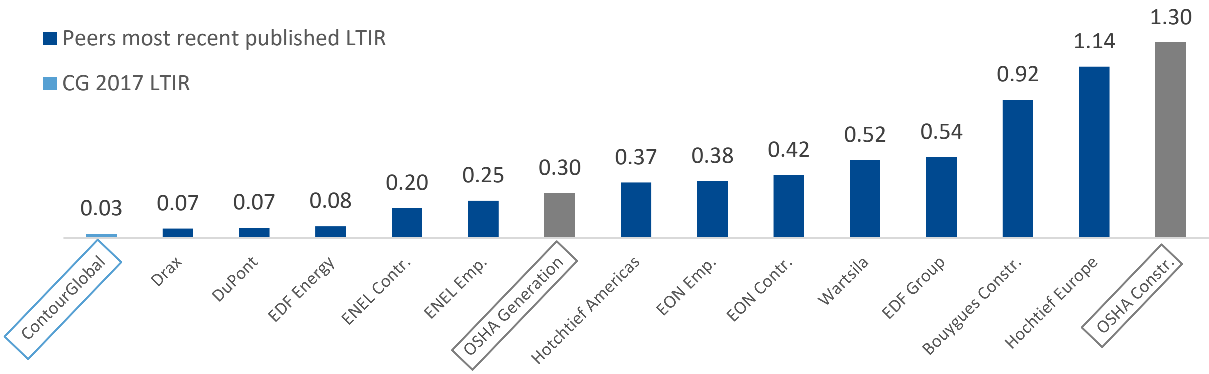
KivuWatt 26MW Methane Gas Extraction Facility & Power Plant (Rwanda)

Industry Leading Health & Safety Performance
0.03 LTIR (1) achieved

'Target Zero' Remains ContourGlobal's Core Priority



Leading the Sector in Health and Safety Performance



Inka Wind Farm, Peru

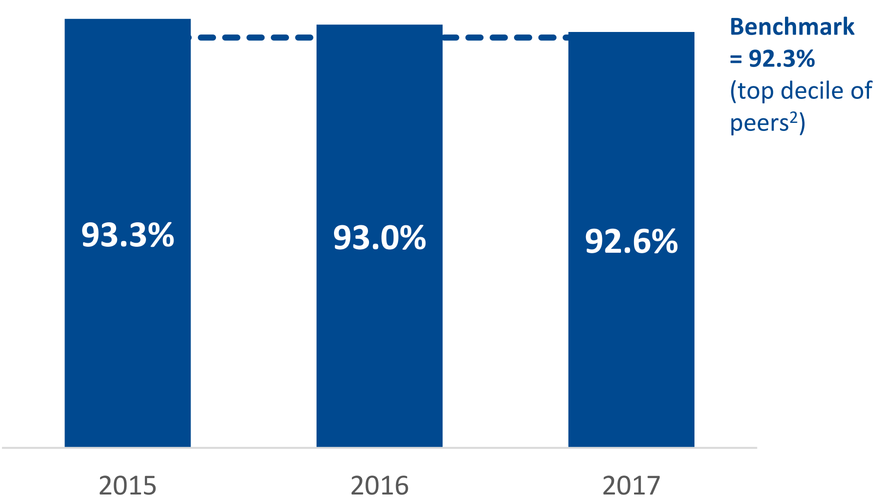
(1) Lost Time Injury Rate ("LTIR") is an industry standard reporting convention for calculating injuries in the workplace

World Class Operating Performance

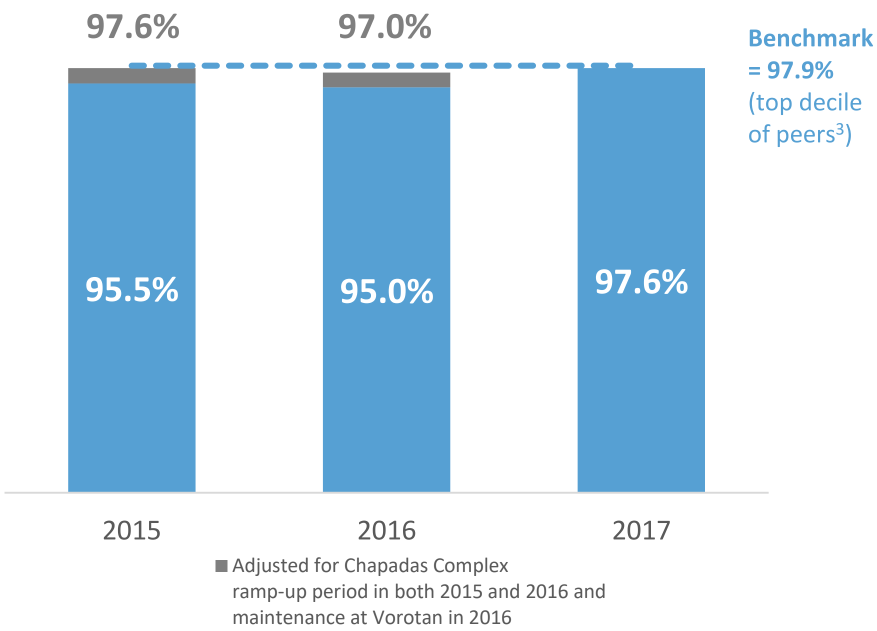
The fleet continues to show excellent performance

- ✓ Group availability for both segments in line or close to top decile targets
- ✓ Brazil wind behind operational targets in 2017 – significant focus on bringing up to CG operational excellence standards

Thermal – Availability Factor (1) (%)



Renewable – Availability Factor (1) (%)

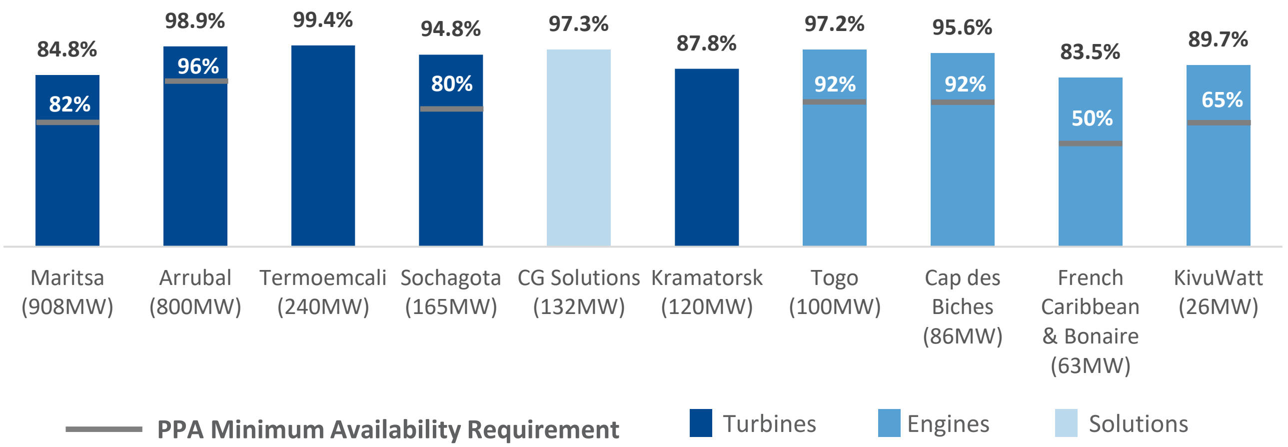


[1] Availability factor refers to the actual amount of time a plant or group of plants is available to produce electricity, which reflects anticipated maintenance and scheduled interruptions
[2] Thermal benchmark sourced from Navigant Benchmark Study (comparable size, technology and load profile of the plant)
[3] Renewable benchmark values are sourced from peers benchmarking studies performed by DNV GL for Wind and Navigant for small Hydro plants. Vorotan is not represented in the Benchmark comparison due to the specifics of the asset.

Consistently High Performance Across All Technologies and Regions

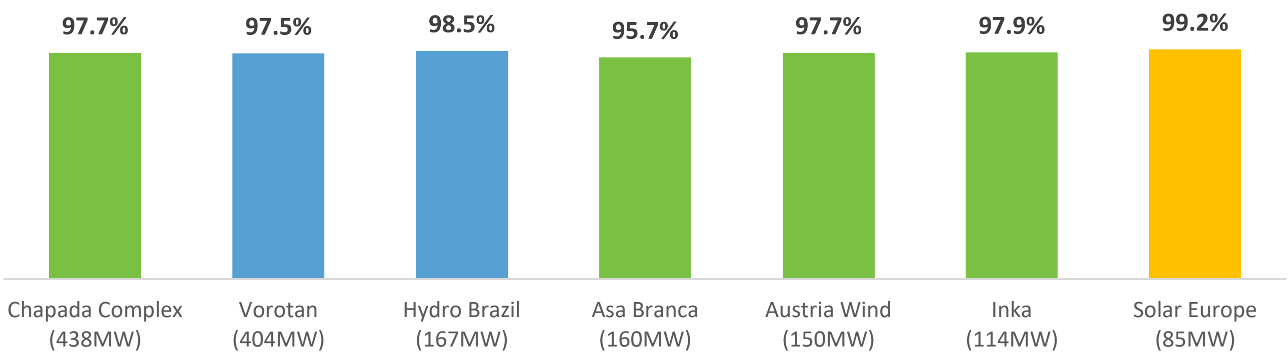
Knockmore Hill Solutions Plant, Northern Ireland

Thermal fleet availability factors



Scharndorf Wind Farm, Austria

Renewable fleet availability factors



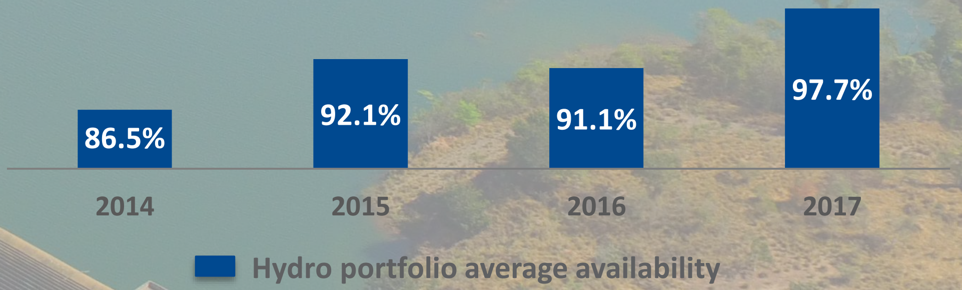
Case Study 1 / Successful Integration of 130MW Hydro and 76MW Cogeneration Portfolio Acquired in March 2017

Hydro Brazil portfolio II – Nova Aurora 21MW hydro station

November 2016: signing 130MW hydro and 76MW cogeneration portfolio acquisition in Brazil

- Immediate implementation of integration plan covering H&S, O&M, compliance, operations, IT, HR, corporate services, legal and commercial
- Significant operational improvements especially at hydro portfolio driven by:
  - Implementation of temperature and vibration monitoring systems
  - Installation of 8 clean automatic grids for safe operation
  - Change of waterproof seals in distributor covers
  - Central control room in Asa Branca fully operating newly acquired assets in April 2017 as planned

- **Availability metrics for hydro plants improved from 91% in 2016 to 98% in 2017**
- **H&S target of Zero LTIs achieved by all the plants in the portfolio**



Case Study 2 / Successful Execution of Solar Roll-Up Strategy

Implementing Solar growth strategy since 2014 – adding significant value through operational improvements and costs reduction

Sourcing

- Roll-up strategy to acquire mid-sized solar portfolios in Italy
- Italian market remains fragmented with many opportunities
- First investment in 2010 with roll-up strategy resuming in 2014

Integration

- Substantial synergy opportunities by leveraging existing platform
- Fully insource maintenance during integration

Improved availability

- outperforming P-50 production scenarios by a total of 4%
- Increased availability from 97.8% in 2012 to 98.7% in 2017
- Higher than benchmark availability of 98%

Significant cost optimization

- 31% reduction in fixed costs over a 2-year period post acquisition

Delivering on solar roll-up strategy with additional 40MW in 2017

Solar Italy – 0.5MW Monticchio solar plant

3. Financial Results

Jean-Christophe Juillard

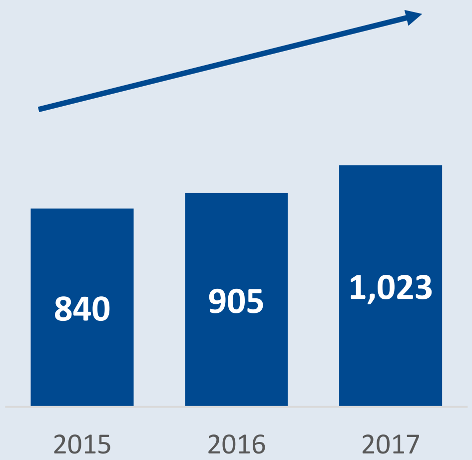
Executive Vice President & Chief Financial Officer

Asa Branca 160MW Wind Farm (Brazil)

Robust Financial Performance
Significant growth in Revenues, Adjusted EBITDA and FFO

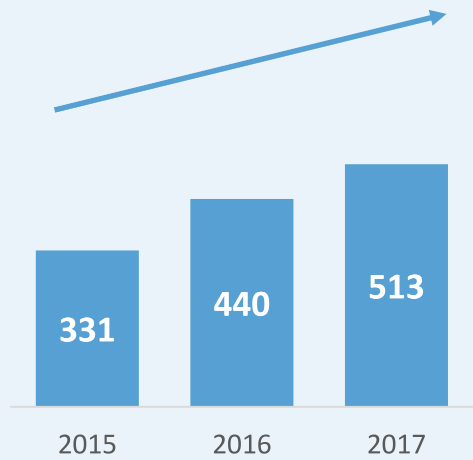
Revenue
(US$m)

CAGR: 10%



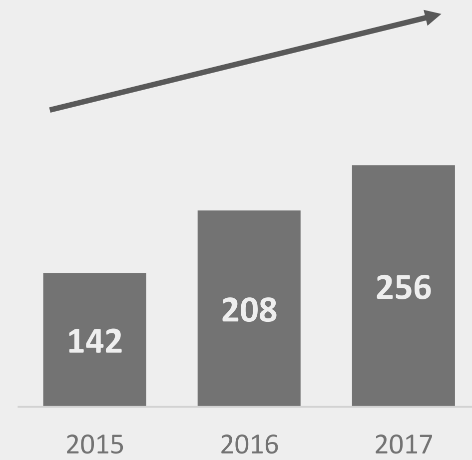
Adjusted EBITDA [1]
(US$m)

CAGR: 25%



FFO [1]
(US$m)

CAGR: 34%



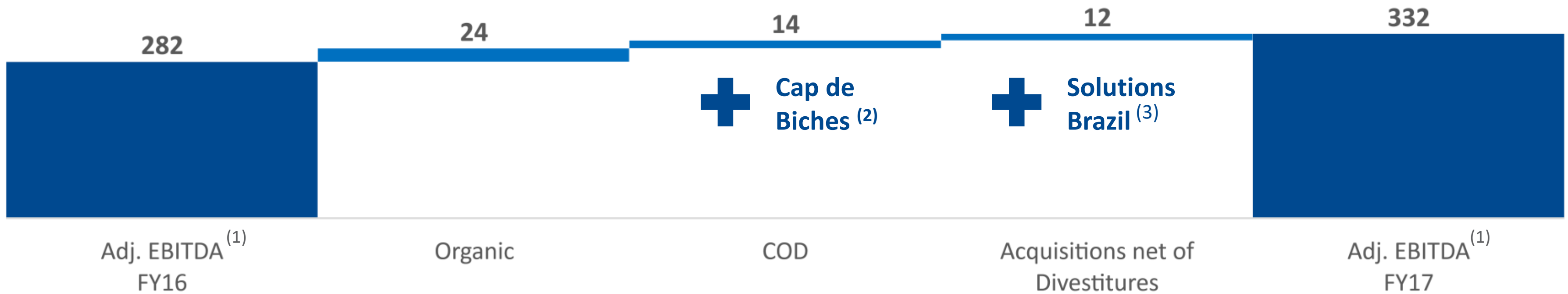
✓ **$17.5m stub period dividend attributable to Q4 2017 expected to be paid in May 2018 (to be approved at the 2018 AGM)**

[1] *Adjusted EBITDA and FFO are non-IFRS measures as defined in IPO Prospectus*

Successful Integration of New Assets Drives Growth

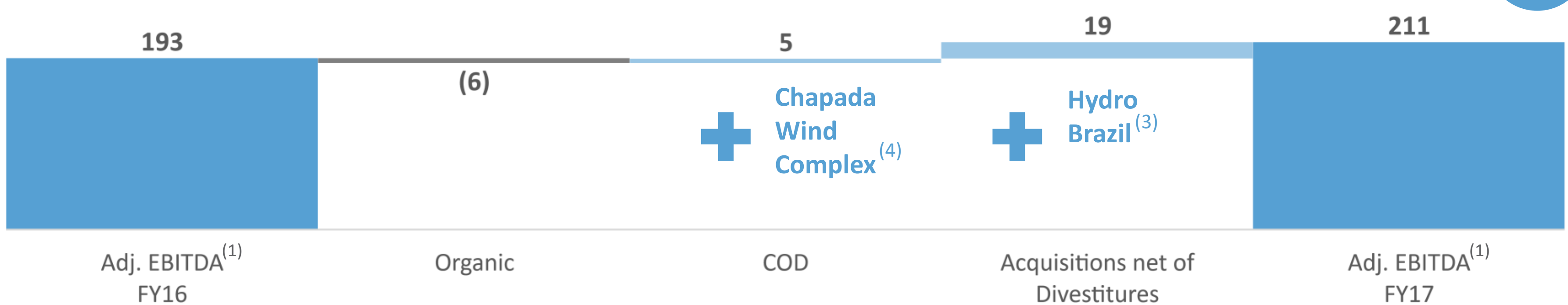
ADJUSTED EBITDA - THERMAL DIVISION (US$m)

18% increase



ADJUSTED EBITDA - RENEWABLE DIVISION (US$m)

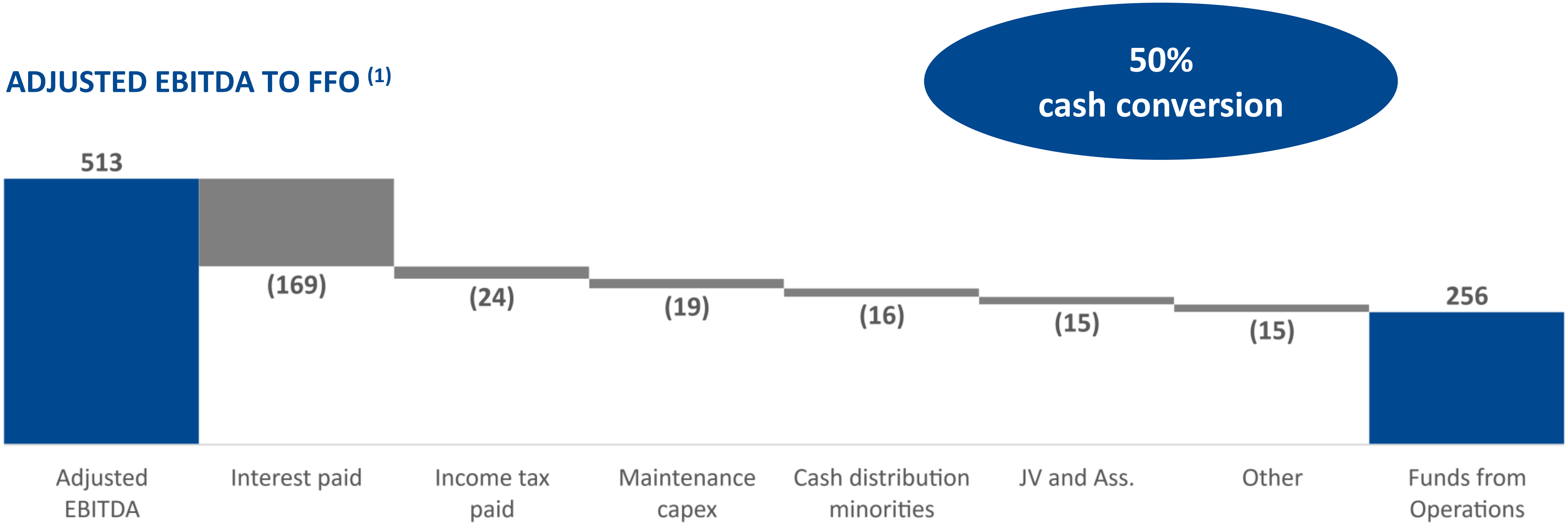
9% increase



(1) *Before Corporate Costs*
(2) *Cap de Biches I (53MW) and Cap de Biches II (33MW) were COD in May and October 2016 respectively*
(3) *Acquisition closed on March 17th, 2017*
(4) *Chapada II (173MW) and Chapada III (60MW) were COD in Q1 2016 for most of windparks*

Significant Cash Conversion Achieved in 2017

ADJUSTED EBITDA TO FFO [1]

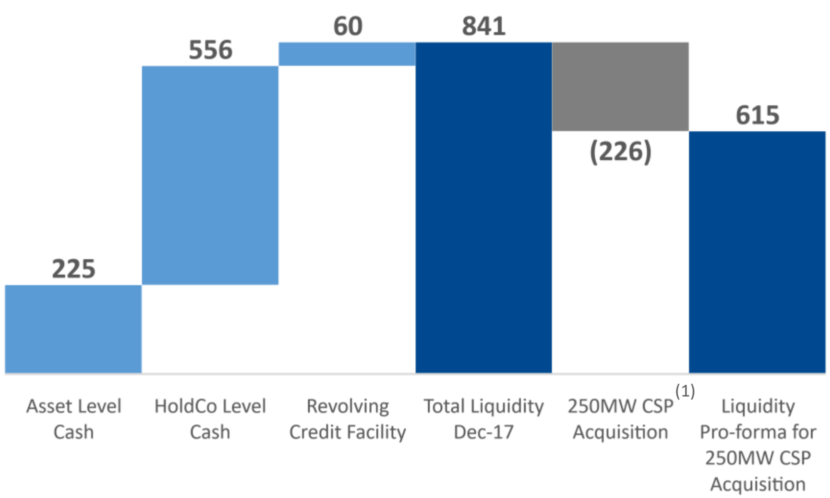


(1) Funds From Operations is defined as Cash Flow from Operating Activities excluding changes in working capital, less interest paid, less maintenance capital expenditure, less distribution to minorities. Funds from Operations is a non-IFRS measure

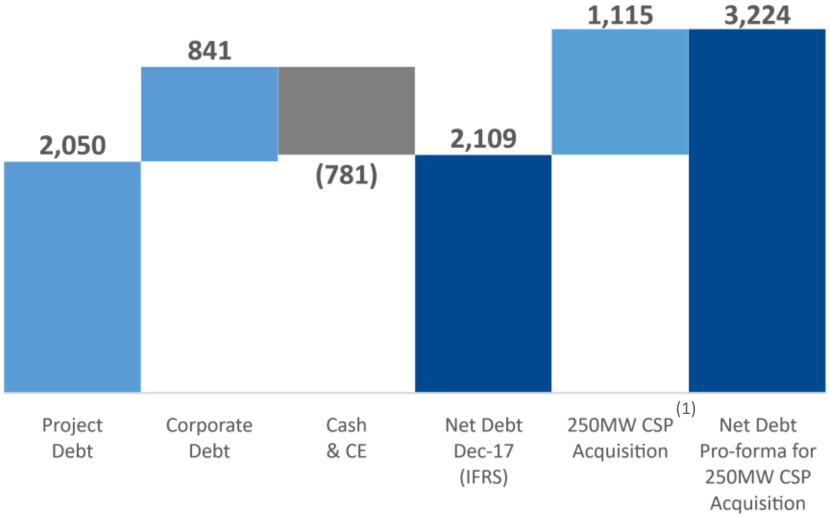
November IPO Further Enhances Credit Strength
Strong Liquidity to Support Future Growth

- ✓ $2.1bn Net Debt as of Dec 17 in line with expectations / $3.2bn pro-forma for Spanish CSP acquisition
- ✓ $616m liquidity at parent level, including $556m corporate cash and $60m undrawn corporate level credit facility as of Dec 17 / $390m pro-forma for Spanish CSP acquisition
- ✓ Committed to high value growth while maintaining BB credit metrics

Dec-17 LIQUIDITY – Pro forma for Spanish CSP portfolio acquisition (US$m)



Dec-17 NET DEBT – Pro forma for Spanish CSP portfolio acquisition (US$m)

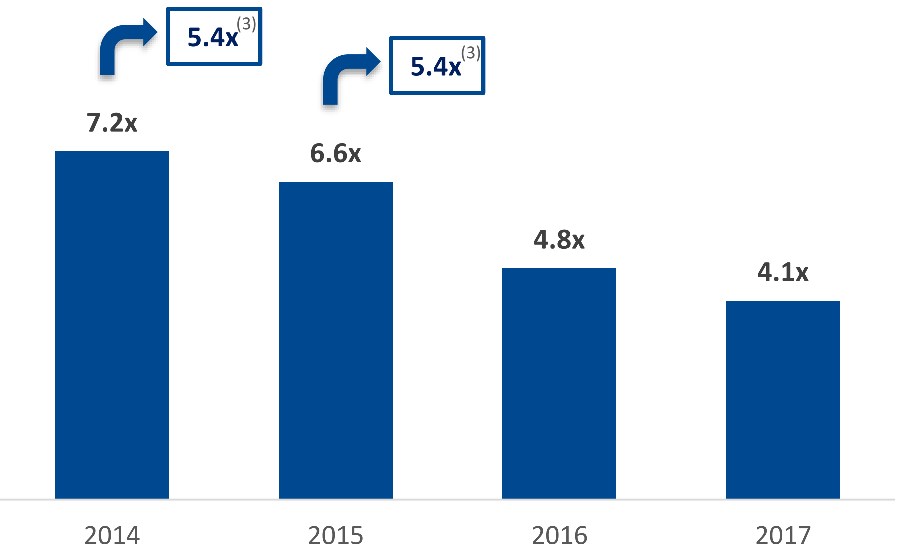


(1) Amounts in EUR converted based on 31 Dec 17 EUR/USD FX of 1.20

4.1x Net Leverage as of 31 December 2017 in Line with Expectations

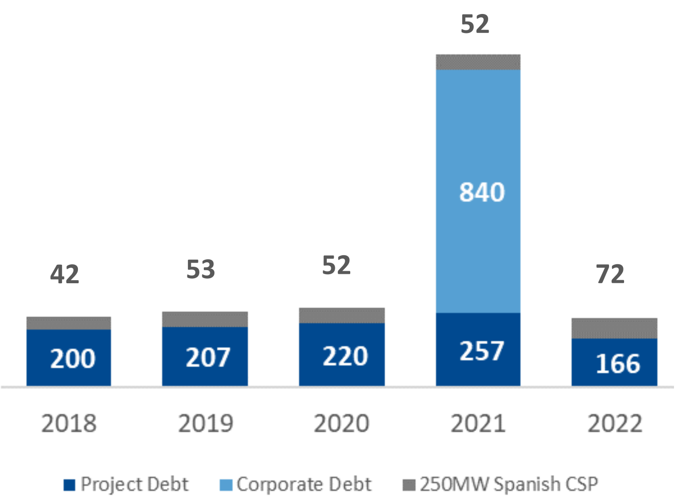
✓ **Leverage target guidance at IPO: 4.0-4.5x**

Adj. IFRS Net Debt / Adj. EBITDA (1) (2)



(1) Adjusted Net Debt and Adjusted EBITDA are non-IFRS measures
(2) CG share of Net Debt at Termoemcali and Sochagota considered
(3) Adjusted EBITDA excludes earnings from newly commissioned development projects and acquisitions that have yet to contribute to a full year of earnings while Adjusted Net Debt excludes debt associated with these newly commissioned development projects and acquisitions

Gross Debt Maturity as of Dec-17 – Pro forma for Spanish CSP portfolio acquisition (US$m)



Notes:
- *the consolidated gross debt amounts to $2,926m as of Dec-17, while consolidated debt as reported in IFRS Statement of Financial Position includes US$18m interest payable, US$(35m) of deferred financing costs and US$(19)m of other Fair Market Value adjustments.*
- *Gross debt on Spanish CSP portfolio converted based on USD/EUR FX as at 31 Dec-17 (1.2005)*

4. Closing Remarks

Joseph Brandt

President & Chief Executive Officer

Sao Domingos II 25MW Hydro Power Plant (Brazil)

2017 Results
Closing Remarks

- ✓ In 2017, strong growth in revenues, adjusted EBITDA and cash flow generation
- ✓ Industry leading Health & Safety and operational metrics
- ✓ Confirming objective set at IPO of doubling run-rate Adjusted EBITDA by 2022
- ✓ On track for delivering further growth
  - Targeted close of 250MW Spanish CSP transaction in Q2 2018
  - Austrian wind repowering on time and budget
  - Continuing to deliver on solar roll-up
- ✓ On track for Kosovo financial close
- ✓ Continue pursuing M&A opportunities discussed during IPO
- ✓ 2018 expected dividend within tightened range of $75m-$80m from initial range of $70m-$80m

Appendix

Sao Domingos II 25MW Hydro Power Plant (Brazil)

2017 Key Financial Metrics

In US$ millions	Years ended December 31, 2016	2017	Var	Var %
Revenue	905.2	1,022.7	117.5	13%
Gross profit	269.2	306.4	37.2	14%
SG&A	(36.6)	(31.9)	4.7	-13%
Adjusted EBITDA	440.4	513.2	72.8	17%
Net profit / (loss) before income tax	42.9	40.6	-2.3	-5%
FFO	207.9	255.9	48.0	23%

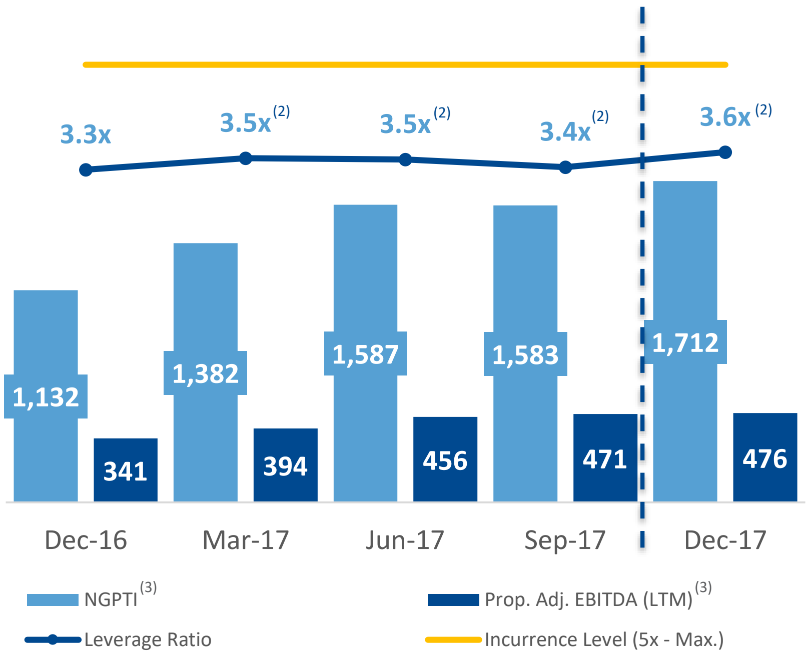
(1) *For both years, the Adjusted weighted average number of shares has been calculated starting from the date of incorporation through to 31 December 2017*

Continued Strong Bond Credit Metrics

5.6x DSCR & 3.6x Non-Guarantor Combined Leverage Ratio as of Dec 17

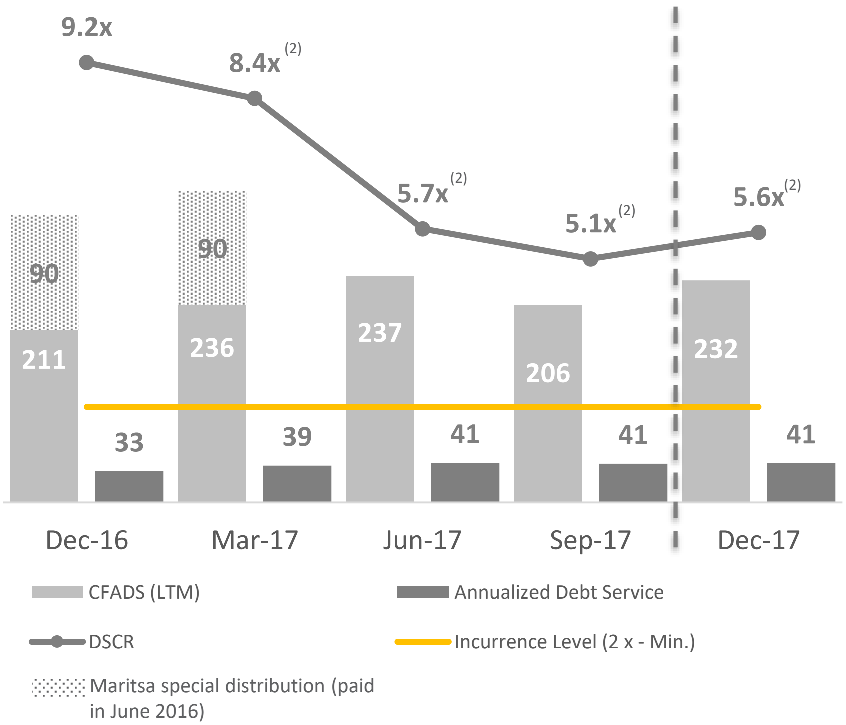
Leverage Ratio [1]

In US$m or multiple



DSCR [1]

In US$m or multiple



[1] DSCR and Leverage Ratio (Non-guarantor combined leverage ratio) as defined in Bond Indenture.
[2] DSCR and Leverage Ratio account for 12 months of operations and are proforma for 206MW Hydro and Cogeneration business in Brazil and 19MW Solar Italy assets (acquisition closed in December 2018)
[3] Please see slide 28 for calculation of Bond Indenture Leverage Ratio, including Proportionate Adjusted EBITDA and NGPTI (Non-Guarantor Proportionate Total Indebtedness) .

Reconciliation of Bond Metrics to IFRS Financial Statements

Bond metrics definitions use Proportionate Adjusted EBITDA ("PAE") and Non-Guarantor Proportionate Total Indebtedness ("NGPTI") to calculate leverage ratios. These definitions exclude Corporate Level Financings and Project Finance Subsidiaries ("PFS") (projects not yet reached, or recently passed, COD). As of December 31st, 2017, no project is treated as a PFS.

Calculation of PAE ($m)	Dec-16	Dec-17
Income From Operations	**222**	**269**
Depreciation & Amortization	169	186
Share in JVs	21	22
Other	28	37
Adjusted EBITDA	**440**	**513**
Pro Forma Acquisitions	(3)	14
Project Finance Subsidiaries	(90)	-
Holdcos & Other	38	33
Pro Rata Adjustment	(44)	(84)
PAE	**341**	**476**

PAE (Proportionate Adjusted EBITDA)

- includes our share in 206MW hydro and cogeneration portfolio in Brazil pro-forma Adjusted EBITDA
- includes our share in JVs (Sochagota & Termoemcali)
- no Project Finance Subsidiaries as of 31 Dec 2017, while PFS include KivuWatt, Chapada I, II and III and Cap des Biches Phase 1 and 2 as of 31 Dec 2016

Calculation of NGPTI ($m)	Dec-16	Dec-17
Non-Current Borrowings	2,373	2,673
Current Borrowings	157	218
Consolidated Gross Debt	**2,530**	**2,890**
Accrued Int. & IFRS Adj.	33	32
Share in JVs	21	14
Project Finance Subsidiaries (PFS)	(613)	0
DSRA	(72)	(89)
Corporate Bond	(631)	(840)
Pro Rata Calculation	(136)	(294)
NGPTI	**1,132**	**1,712**

NGPTI (Non-Guarantor Proportionate Total Indebtedness)

- excludes debt at parent company level (corporate bond)
- no Project Finance Subsidiaries as of 31 Dec 2017, while PFS include KivuWatt, Chapada I, II and III and Cap des Biches Phase 1 and 2 as of 31 Dec 2016

Top Contributors to Adj. EBITDA

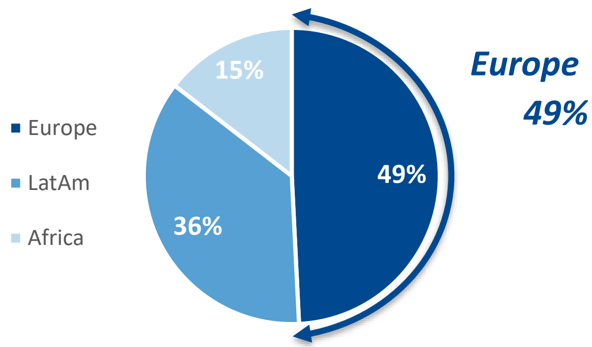
Top Contributors to Adj. EBITDA (US$m)	2016	2017
Main contributors from thermal fleet		
Maritsa East III	117	125
Arrubal	62	61
CG Solutions	13	27
Cap Des Biches	12	26
Togo	21	25
Main contributors from renewable fleet		
Brazil Wind	79	82
Peru Wind (Inka)	31	25
Austria Wind	23	25
Hydro	31	51
Solar Europe (1)	31	31
Total	**420**	**478**
% Total 2017 Adj. EBITDA before Corp. Costs	*88%*	*88%*

(1) ContourGlobal completed the sale of three solar energy plants in Czech Republic, representing a total of 6.0 MW, in November 2016

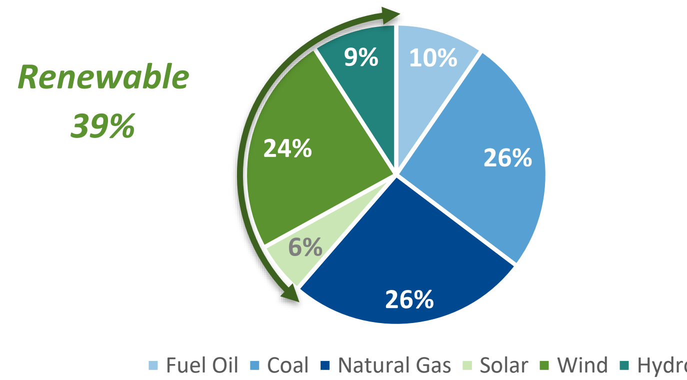
CSP Transaction Significantly Weights the Portfolio Towards Europe and Increases Share of Renewable Assets to 49%

2017 Adj. EBITDA by Geography [1]	2017 Adj. EBITDA by Technology [1]

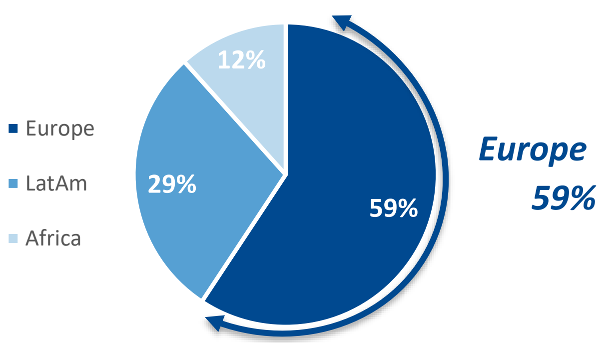
Before Acquisition



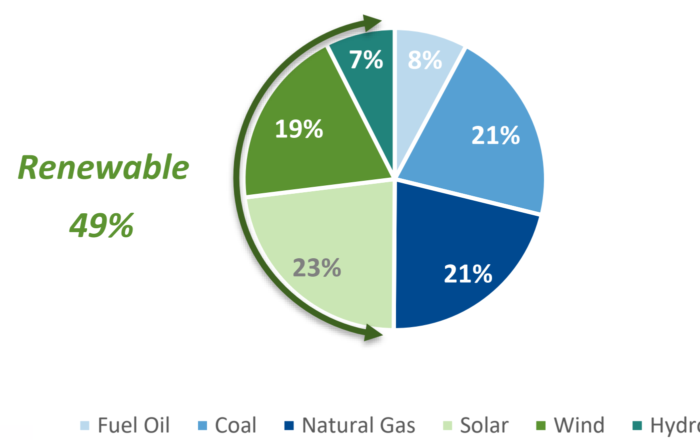
Before Acquisition



After Acquisition



After Acquisition

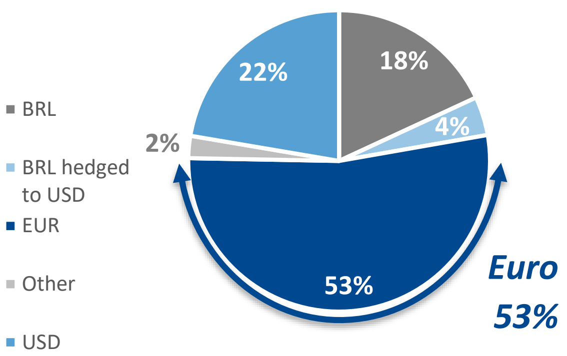


(1) Excluding Corporate Costs

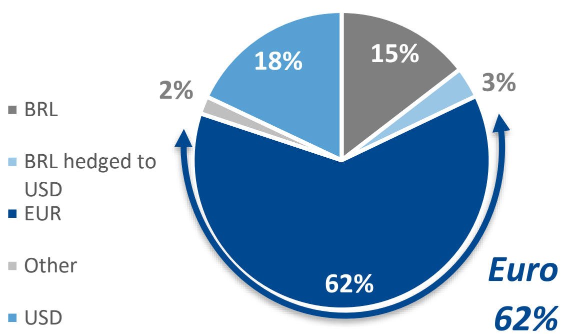
CSP Transaction Significantly Increases Share of Euro-Denominated Assets to 62% and Improves Credit Risk Profile

2017 Adj. EBITDA by Currency	2017 Adj. EBITDA by Credit Risk (1) (2)

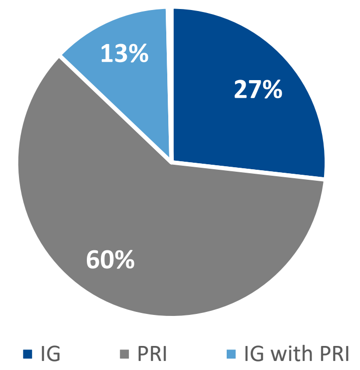
Before Acquisition



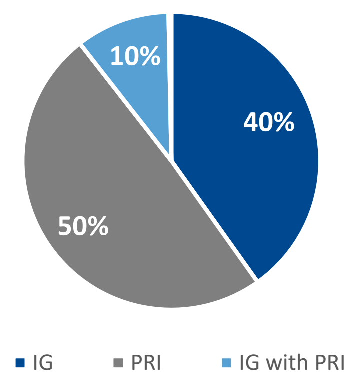
After Acquisition



Before Acquisition



After Acquisition



(1) Excluding Corporate Costs
(2) Based on S&P and Moody's ratings

ContourGlobal Portfolio

Segment	Facility / Project Name	Location	Gross Cap. (MW)	Fuel Type [1]	CG Ownership	COD	Power Purchaser	PPA Expiration
Thermal	**Maritsa**	Bulgaria	**908**	Coal	73%	1978	NEK	2024
	Arrubal	Spain	**800**	Natural Gas	100%	2005	Gas Natural Fenosa	2021
	TermoemCali	Colombia	**240**	Natural Gas / Diesel	37%	1999	Various	N/A
	Sochagota	Colombia	**165**	Coal	49%	1999	Gensa	2019
	CG Solutions	Europe – Nigeria – Brazil	**132**	Natural Gas / Diesel / LFO	88% [2]	1999-2015	Investment grade global industrial companies	2018-2032
	Togo	Togo	**100**	Natural Gas / HFO / Diesel	80%	2010	CEET	2035
	Cap des Biches	Senegal	**86**	Oil /Natural Gas	100%	2016	Senelec	2036
	Energies Antilles / Energies St Martin	French Caribbean	**35**	HFO / LFO	100%	2000; 2003	EDF	2020; 2023
	Bonaire	Dutch Antilles	**28**	Fuel Oil / Wind	100%	2010	WEB	2025
	KivuWatt	Rwanda	**26**	Natural Gas	100%	2015	EWSA (ex-Electrogaz & REC)	2040 (expected)
Renewables	**Chapada Complex**	Brazil	**438**	Wind	51%, 51%, 100%	2015; 2016	CCEE; distribution companies	2035; 2036
	Vorotan	Armenia	**404**	Hydro	100%	1970	AEN	2040
	Hydro Brazil	Brazil	**167**	Hydro	73% [2]	1963-2012	Distribution companies	2027-2042
	Asa Branca	Brazil	**160**	Wind	100%	2013	Distribution companies	2033
	Austria Wind	Austria	**150**	Wind	94%	2003-2014	OeMAG	2016-2027
	Inka	Peru	**114**	Wind	100%	2014	Distribution companies	2034
	Solar Slovakia	Slovakia	**35**	Solar	100%	2010-2011	Distribution companies	2025-2026
	Solar Italy	Italy	**50**	Solar	100%	2007-2013	Gestore Servizi Energetici S.p.A.	2027-2033
Total portfolio as of Dec 2017 [3]			**4,039**					
Renewables	**Solar Italy [4]**	Italy	**15**	Solar	100%	2011-2013	Gestore Servizi Energetici S.p.A	2031-2034
	Biogas Italy [4]	Italy	**2**	Biogas	100%	2013	Gestore Servizi Energetici S.p.A	2028
	Solar Romania [4]	Romania	**7**	Solar	100%	2013	Distribution companies	2029
	CSP Portfolio [5]	Spain	**250**	CSP	100%	2009-2012	CNMC	2034-2037
Total portfolio pro-forma for 23MW Solar/Biogas and 250MW CSP Portfolios acquisitions			**4,312**	**Total portfolio**				

Thermal **Renewables**

[1] *HFO refers to heavy fuel oil, and LFO to light fuel oil.*

[2] *Capacity weighted*

[3] *Pro-forma for 140MW KTE plant sale, closed on 26 February 2018*

[4] *Acquisition of 17MW closed in March 2018. Acquisition of the remaining 7MW expected to close in May 2018*

[5] *Acquisition expected to close in Q2 2018*

IR Information

Next Event & Contact Point

Next IR Events

Date	Event	Location
25 May 2018	Trading Update and Annual General Meeting	London
7 August 2018	Half-Year Results Announcement	Conference Call
13 December 2018	Trading Update	Conference Call

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