



**ENRON**  
**EARNINGS RELEASE - EXTERNAL FORM.**  
(Millions of Dollars, except as noted)

|                                                   | First Quarter   |                |                         |                 | 2000            | 01 vs 00 |
|---------------------------------------------------|-----------------|----------------|-------------------------|-----------------|-----------------|----------|
|                                                   | 2001            |                |                         |                 | Actual          | Growth   |
|                                                   | Plan            | Update         | Stock Option Adjustment | Forecast        |                 |          |
| Transmission & Distribution                       | \$ 130.0        | \$ -           | 1.8                     | \$ 131.8        | \$ 127.9        |          |
| Enron Transportation Services                     | 100.0           | (40.0)         | -                       | 60.0            | 105.3           |          |
| Portland General                                  | 230.0           | (40.0)         | 1.8                     | 181.8           | 233.2           | -18%     |
| <b>Total Transmission &amp; Distribution</b>      |                 |                |                         |                 |                 |          |
| Wholesale Energy Operations & Services            | 265.5           | 566.7          | 5.1                     | 837.3           | 137.5           |          |
| Americas                                          | 80.5            | 4.5            | 1.9                     | 86.9            | 67.7            |          |
| Europe                                            | 45.0            | 0.1            | 1.1                     | 46.2            | 50.0            |          |
| Global Markets                                    | 8.5             | (0.2)          | 0.5                     | 8.8             | -               |          |
| Industrial Markets                                | (4.4)           | -              | 0.8                     | (3.6)           | (14.2)          |          |
| Net Works                                         | 88.1            | (43.2)         | 3.0                     | 47.9            | 67.5            |          |
| Global Assets                                     | -               | (231.0)        | -                       | (231.0)         | -               |          |
| Retail Risk Management                            | (0.8)           | (30.5)         | -                       | (31.3)          | -               |          |
| Other Wholesale                                   | 482.3           | 266.4          | 12.4                    | 761.2           | 308.5           |          |
| Subtotal                                          | 49.5            | (37.5)         | 0.5                     | 12.5            | 104.4           |          |
| Global Finance                                    | 4.7             | 10.8           | 0.4                     | 15.9            | 4.1             |          |
| Global E&P                                        | (35.1)          | 20.1           | -                       | (15.0)          | (22.9)          |          |
| Prepays                                           | 105.5           | (114.7)        | 1.2                     | (8.0)           | 29.8            |          |
| Other                                             | 608.9           | 145.1          | 14.5                    | 766.5           | 423.9           | 81%      |
| <b>Total Wholesale Energy Ops. &amp; Services</b> |                 |                |                         |                 |                 |          |
| Enron Energy Services                             | 48.5            | (8.9)          | 3.9                     | 43.5            | 11.3            | 285%     |
| Enron Broadband Services                          | (35.0)          | -              | -                       | (35.0)          | (0.3)           |          |
| Corporate and Other                               | (17.1)          | (14.4)         | -                       | (31.5)          | (6.0)           |          |
| Azurix                                            | (10.0)          | (7.0)          | 0.2                     | (16.8)          | 11.9            |          |
| Enron Renewable Energy Corp                       | (16.3)          | (1.0)          | 0.2                     | (17.1)          | (3.3)           |          |
| Clean Fuels                                       | (0.1)           | (1.3)          | -                       | (1.4)           | (0.4)           |          |
| Enron Investment Partners                         | (61.6)          | (17.5)         | (20.6)                  | (99.7)          | (35.7)          |          |
| Corporate & Other Expenses                        | 4.0             | 0.4            | -                       | 4.4             | 6.8             |          |
| Structured Transactions                           | -               | -              | -                       | -               | (17.4)          |          |
| Redress from/lo Wholesale                         | (101.1)         | (40.8)         | (20.2)                  | (162.1)         | (44.1)          |          |
| <b>Total Corporate &amp; Other</b>                |                 |                |                         |                 |                 |          |
| Overview                                          | 22.4            | (22.4)         | -                       | -               | -               |          |
| INCOME BEFORE INT., M.I. & INC. TAXES             | 771.7           | 33.0           | -                       | 804.7           | 612.7           | 31%      |
| Interest Expense, Net                             | 203.2           | 5.2            | -                       | 208.4           | 181.1           | 29%      |
| Dividends on Preferred Stock of Subsidiaries      | 18.4            | -              | -                       | 18.4            | 18.1            |          |
| Minority Interest                                 | 23.8            | 13.4           | -                       | 37.2            | 34.9            |          |
| PRE-TAX INCOME                                    | 528.3           | 14.4           | -                       | 540.7           | 398.6           | 30%      |
| Income Tax Expense                                | 128.3           | 3.5            | -                       | 129.8           | 72.2            | 28%      |
| <b>NET INCOME - RECURRING</b>                     | <u>\$ 400.0</u> | <u>\$ 10.9</u> | <u>\$ -</u>             | <u>\$ 410.9</u> | <u>\$ 326.4</u> |          |
| DILUTED EPS                                       | \$ 0.45         | \$ 0.02        | \$ -                    | \$ 0.47         | \$ 0.38         | 24%      |
| Recurring                                         | -               | -              | -                       | -               | -               |          |
| Non-recurring                                     | \$ 0.45         | \$ 0.02        | \$ -                    | \$ 0.47         | \$ 0.38         |          |
| <b>TOTAL DILUTED EPS</b>                          |                 |                |                         |                 |                 |          |
| Avg shares outstanding - Diluted                  | 885.0           | -              | -                       | 871.1           | 851.8           |          |
| Effective Tax Rate - Recurring Earnings           | 24.0%           | -              | -                       | 24.0%           | 18.1%           |          |

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ENRON  
2001 OPERATING & STRATEGIC PLAN  
ENRON AMERICAS  
SUPPLEMENTAL INFORMATION

(Millions of Dollars)

|                                                    | <u>1st Qtr</u> | <u>Year</u>       |
|----------------------------------------------------|----------------|-------------------|
| Schedule C Reserves - 3/1/01                       | \$ 1,300.0     | \$ 1,300.0        |
| EES Related:                                       |                |                   |
| California Credit                                  | (455.0) (A)    | (455.0)           |
| Tariff Adjustment                                  | (320.0)        | (320.0)           |
| Potential Adjustments                              | -              | (400.0)           |
| Volatility                                         | (288.0)        | - (B)             |
| Specific Transactions                              | (150.0)        | (150.0)           |
| Raptor Credit                                      | (37.0)         | (37.0)            |
| California Investigation                           | (50.0)         | (50.0)            |
| Gain on Sale of Peakers                            | -              | 400.0             |
| HPL                                                | -              | (100.0)           |
| Reserves Remaining                                 | <u>\$ -</u>    | <u>\$ 188.0</u>   |
| ENA Q1 overperformance                             |                | 566.7             |
| Total ENA overperformance needed to hit \$1.75 EPS |                | (946.0) (C)       |
| Amount currently short                             |                | <u>\$ (191.3)</u> |

Current Status: Assumes ENA will hit original Q2, Q3 & Q4 plan (IBIT \$692.4 million)

(A) Assumes 20% recovery on ~\$570 million of negative CTC and other receivables

(B) Assumes any amount funded with "new money"

(C) New Current Estimate for the year to be completed by end of April

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# ENRON

## 1st Quarter 2001 Reconciliation of ENA Coverage

(Millions of Dollars, except as noted)

|                                      |                 |
|--------------------------------------|-----------------|
| Retail Risk Management               | \$ 231.0        |
| Delay in LDC Sales                   | 115.0           |
| PGE Below Plan                       | 40.0            |
| Global Assets Below Plan             | 43.2            |
| Global Finance Below Plan            | 37.5            |
| EES Below Plan                       | 9.8             |
| EBS Costs                            | 17.3            |
| Azurix, EREC, Clean Fuels below plan | 22.4            |
| EPS increase of \$.02                | 22.0            |
| Financing Costs and Other            | 28.5            |
| Total                                | <u>\$ 566.7</u> |

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Corporate Staff and Service Group Analysis  
Corporate Staff & Services Groups - Costs Retained  
(In thousands of dollars, except headcount)

|                                                                | First Quarter  |               | Variance       |
|----------------------------------------------------------------|----------------|---------------|----------------|
|                                                                | 2001           | 2000          |                |
| Executive                                                      | (11.3)         | (5.6)         | (5.7)          |
| Legal                                                          | (2.9)          | (2.2)         | (0.7)          |
| Risk Assessment & Controls                                     | 0.9            | (0.1)         | 1.0            |
| Accounting                                                     | (3.9)          | (3.6)         | (0.3)          |
| Tax                                                            | (4.4)          | (2.1)         | (2.3)          |
| SAP/SC                                                         | (1.9)          | (1.9)         | -              |
| Strategic Sourcing                                             | (2.0)          | (0.4)         | (1.6)          |
| Investor Relations                                             | (1.1)          | (0.9)         | (0.2)          |
| Government Affairs                                             | (3.1)          | (0.1)         | (3.0)          |
| Public Affairs                                                 | (2.2)          | (3.6)         | 1.4            |
| Property Services & Aviation                                   | (1.1)          | (1.7)         | 0.6            |
| Corporate Development                                          | (1.3)          | (1.0)         | (0.3)          |
| Human Resources                                                | (5.1)          | (3.0)         | (2.1)          |
| Community Relations                                            | (2.3)          | (2.2)         | (0.1)          |
| Benefit Plans - \$8.4 restricted stock, \$7.1 bonus accrual    | (30.9)         | (13.1)        | (17.8)         |
| Allocation of stock option charge                              | -              | 10.9          | (10.9)         |
| Restricted stock hedge loss                                    | (5.8)          | -             | (5.6)          |
| Amortizations                                                  | (16.3)         | (14.0)        | (2.3)          |
| IT costs - timing of allocations in 2000, moved to ENW in 2001 | -              | (9.4)         | 9.4            |
| Interest income                                                | 5.2            | 12.6          | (7.4)          |
| EBS costs                                                      | (4.7)          | -             | (4.7)          |
| EREC adjustment                                                | -              | -             | -              |
| Azurix adjustment                                              | -              | (8.0)         | 8.0            |
| Other                                                          | (5.7)          | (3.7)         | (2.0)          |
| <b>Total Corporate costs retained</b>                          | <b>(55.7)</b>  | <b>(53.1)</b> | <b>(46.6)</b>  |
| Azurix                                                         | (31.5)         | (6.0)         | (25.5)         |
| Structured Transactions                                        | 4.4            | 6.8           | (2.4)          |
| EREC                                                           | (16.8)         | 11.9          | (28.7)         |
| Clean Fuels                                                    | (17.1)         | (3.3)         | (13.8)         |
| Enron Investment Partners                                      | (1.4)          | (0.4)         | (1.0)          |
| <b>Total Corporate &amp; Other - recurring</b>                 | <b>(182.1)</b> | <b>(44.1)</b> | <b>(118.0)</b> |

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**CORPORATE & OTHER**  
**FIRST QUARTER 2001 FORECAST**  
(in millions)

|                                | <u>Flash</u>       |
|--------------------------------|--------------------|
| Plan                           | 61.1               |
| Cost Center variances -        |                    |
| Executive                      | 4.4                |
| Human Resources & Click @ Home | 3.7                |
| Benefits                       | 3.5                |
| Analyst & Associates           | 1.9                |
| Public Affairs                 | (4.0)              |
| Depreciation                   | (2.0)              |
| ENW allocations                | (3.7)              |
| Interest Income                | (5.6)              |
|                                | <u>(1.8)</u>       |
| Restricted stock hedge loss    | 5.6                |
| EBS allocation relief          | 8.6                |
| EBS costs                      | 4.7                |
| Stock option allocations       | 21.4               |
| Other                          | <u>0.1</u>         |
| Forecast                       | <u><u>99.7</u></u> |

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**ENRON**  
**2001 OPERATING & STRATEGIC PLAN - FORECAST**  
**INCOME BEFORE INTEREST & TAXES BY BUSINESS UNIT**  
(Millions of Dollars, except as noted)

|                                         | Plan       | Effect of<br>Asset Sales<br>Timing | Adjusted<br>Forecast | Other<br>Adjustments | Total<br>Adjusted<br>Forecast |
|-----------------------------------------|------------|------------------------------------|----------------------|----------------------|-------------------------------|
| Americas                                | \$ 957.9   | \$ -                               | \$ 957.9             | \$ 946.0             | \$ 1,903.9                    |
| Europe                                  | 347.6      | -                                  | 347.6                | -                    | 347.6                         |
| Global Markets                          | 270.0      | -                                  | 270.0                | -                    | 270.0                         |
| Industrial Markets                      | 83.0       | -                                  | 83.0                 | -                    | 83.0                          |
| Nat Works                               | 103.8      | -                                  | 103.8                | -                    | 103.8                         |
| Global Assets                           | 276.9      | 51.3                               | 328.2                | (82.8)               | 245.4                         |
| Other Wholesale                         | (3.1)      | -                                  | (3.1)                | -                    | (3.1)                         |
| Subtotal                                | 2,016.1    | 51.3                               | 2,067.4              | 883.2                | 2,930.6                       |
| Global Finance                          | 180.0      | -                                  | 180.0                | -                    | 180.0                         |
| EGEP                                    | 4.7        | 15.3                               | 20.0                 | -                    | 20.0                          |
| Retail Risk Management                  | -          | -                                  | -                    | (231.0)              | (231.0)                       |
| Prepay                                  | (168.3)    | -                                  | (168.3)              | -                    | (168.3)                       |
| Structured Transactions & Other         | 293.2      | -                                  | 293.2                | (185.0)              | 108.2                         |
| Subtotal Wholesale                      | 2,305.7    | 66.6                               | 2,372.3              | 447.2                | 2,819.5                       |
| Enron Transportation Services           | 390.0      | -                                  | 390.0                | -                    | 390.0                         |
| Portland General                        | 100.0      | 91.8                               | 191.8                | -                    | 191.8                         |
| Subtotal Transmission & Distribution    | 490.0      | 91.8                               | 581.8                | -                    | 581.8                         |
| EES                                     | 269.0      | -                                  | 269.0                | (44.0)               | 225.0                         |
| EBS                                     | (65.0)     | -                                  | (65.0)               | -                    | (65.0)                        |
| Azurix                                  | (75.4)     | -                                  | (75.4)               | (17.3)               | (92.7)                        |
| EREC                                    | (10.0)     | -                                  | (10.0)               | (8.0)                | (18.0)                        |
| Clean Fuels                             | (30.6)     | -                                  | (30.6)               | -                    | (30.6)                        |
| Enron Investment Partners               | (0.5)      | -                                  | (0.5)                | -                    | (0.5)                         |
| Corporate and Other                     | (226.6)    | -                                  | (226.6)              | (84.0)               | (290.6)                       |
| Overview                                | (30.0)     | 30.0                               | -                    | -                    | -                             |
| Income before Int & Inc Taxes           | 2,626.8    | 188.4                              | 2,815.0              | 313.9                | 3,129.9                       |
| Financing Related Expense               | 623.4      | 294.6                              | 918.0                | 175.2                | 1,093.2                       |
| Income Tax Expense                      | 480.8      | (25.5)                             | 455.3                | 33.3                 | 488.8                         |
| TOTAL NET INCOME-RECURRING              | \$ 1,522.4 | \$ (80.7)                          | \$ 1,441.7           | \$ 105.4             | \$ 1,547.1                    |
| Anti-dilutive preferred dividends       | -          | -                                  | -                    | -                    | -                             |
| TOTAL NET INCOME-RECURRING              | 1,522.4    | (80.7)                             | 1,441.7              | 105.4                | 1,547.1                       |
| Non-Recurring Net Income                | -          | -                                  | -                    | -                    | -                             |
| TOTAL NET INCOME                        | 1,522.4    | (80.7)                             | 1,441.7              | 105.4                | 1,547.1                       |
| DILUTED EPS                             |            |                                    |                      |                      |                               |
| Recurring                               | \$ 1.71    | \$ (0.09)                          | \$ 1.62              | \$ 0.13              | \$ 1.75                       |
| Non-recurring                           | -          | -                                  | -                    | -                    | -                             |
| TOTAL DILUTED EPS                       | \$ 1.71    | \$ (0.09)                          | \$ 1.62              | \$ 0.13              | \$ 1.75                       |
| Avg shares outstanding - Diluted        | 885.0      | 885.0                              | 885.0                | 885.0                | 885.0                         |
| Effective Tax Rate - Recurring Earnings | 24.0%      | 24.0%                              | 24.0%                | 24.0%                | 24.0%                         |

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## (Millions of Dollars, except as noted)

$\frac{1}{10} \times 100 = 10\%$

EXH009-00181