Permitting and Registration in Mexico's Deregulated Power Market

PREPARED FOR THE UT LAW 16TH ANNUAL GAS AND POWER INSTITUTE CONFERENCE, OCTOBER 5, 2017

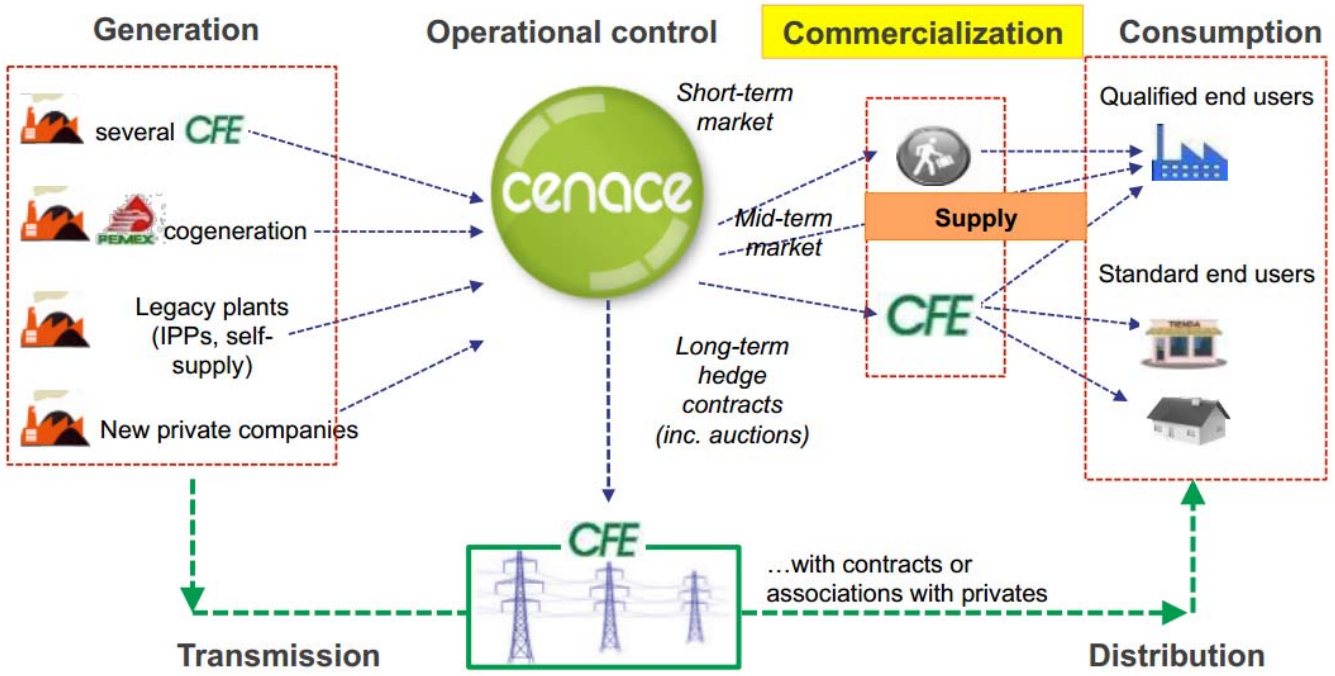
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Mexico's Unbundled Power Market



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Why Mexico?



SCALE

- 13th largest global economy
- Population - 120MM
- CFE Revenue above $24B

HEADROOM POTENTIAL

- Average MX Industrial Rate: $121/MWh
- Average US rate of $68/MWh
- Investment requirements could exceed $120B through 2027

U.S. POWER MARKETS

- Depressed NG prices
- Mature retail markets
- Continual decrease in renewable build cost
- CPP, other regulatory changes – opportunity uncertain

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