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Retail Electric Supply Agreements: How Companies Meet Their Power Supply Needs in the Texas Market

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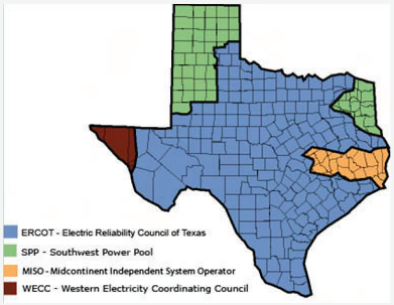
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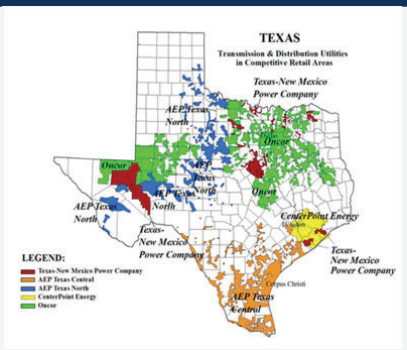
AGENDA

- Texas Market Structure Overview
- Retail Supply Agreements in Areas with Competitive Choice
- Retail Supply Options in Areas without Customer Choice (NOIEs and IOU areas outside ERCOT)
- Common Issues in Retail Supply Agreements
- Renewable Offtake and On-Site Supply Arrangements

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Retail Supply Options Vary By Location

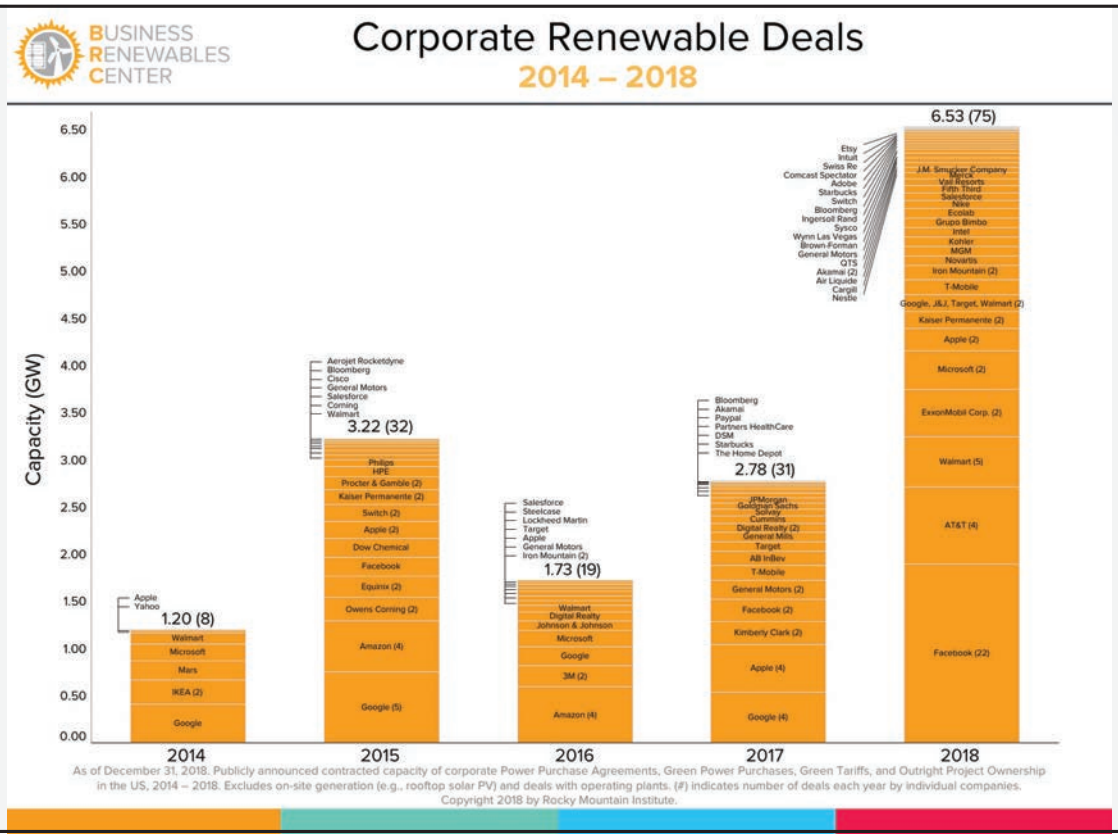




Quick Facts

- 90% of Texas load is in ERCOT; 75% of ERCOT load has competitive choice (more than 8 million electric service IDs (premises))
- More than 25 million consumers in the ERCOT region
  - Includes Houston, Dallas, Fort Worth, San Antonio, Austin, Corpus Christi, Midland and the Rio Grande Valley; Lubbock (2021)
- ERCOT region – Contains service territories with customer choice and "NOIEs" (non-opt-in entities such as electric cooperatives and municipally-owned utilities)
- Non-ERCOT regions – PUCT regulates the retail rates
- Peak ERCOT demand – 2018 Peak Demand 73,473 MW; 2019 Peak Demand 74,531 MW (Aug. 12)

Source: Maps - PUCT, ERCOT "Quick Facts"



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