

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

18th Annual Gas and Power Institute
September 26, 2019
Houston, Texas



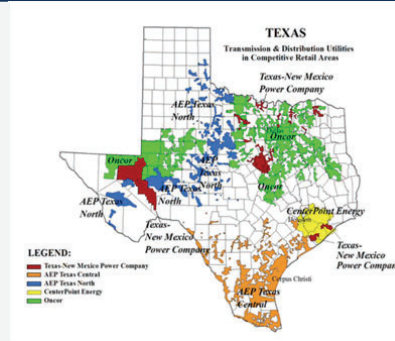
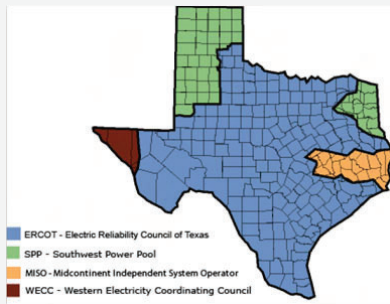
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AGENDA

- 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



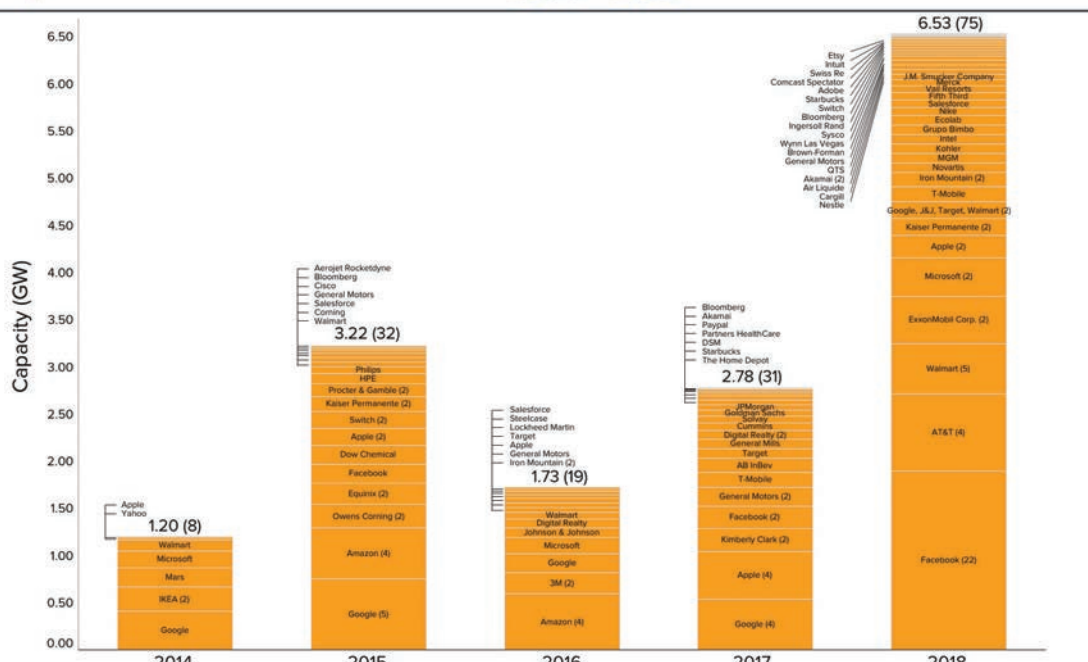
Quick Facts

- 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”



Corporate Renewable Deals 2014 – 2018



As of December 31, 2018. Publicly announced contracted capacity of corporate Power Purchase Agreements, Green Power Purchases, Green Tariffs, and Outright Project Ownership in the US, 2014 – 2018. Excludes on-site generation (e.g., rooftop solar PV) and deals with operating plants. (#) indicates number of deals each year by individual companies. Copyright 2018 by Rocky Mountain Institute.

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First appeared as part of the conference materials for the
18th Annual Gas and Power Institute session

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