

MEXICAN ENERGY REFORM

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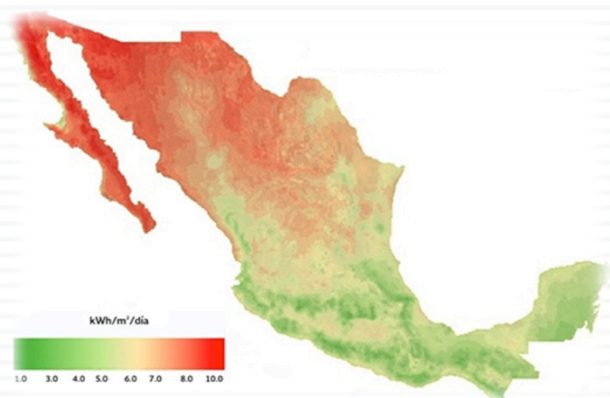
2015 EIA ENERGY CONFERENCE

JUNE 15, 2015

MAPS OF RENEWABLE RESOURCES

DIRECT IRRADIATION

DURING JUNE*



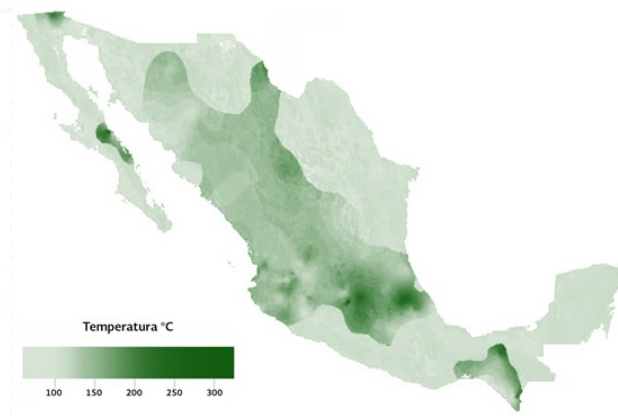
POWER DENSITY

80MTS DURING APR. (W/M²)**



GEOHERMAL RESOURCES

(°C)***



* AVERAGE DAILY IRRADIATION IN MEXICO IS ABOUT 5.5 KWH/M²/D, AND CAN REACH VALUES HIGHER THAN 8.5KWH/M².

** STUDIES TO CHARACTERIZE THE WIND RESOURCE IN REGIONS OF THE ISTHMUS OF TEHUANTEPEC, THE PENINSULAS OF YUCATAN AND BAJA CALIFORNIA, AND THE NORTHERN REGION OF THE GULF OF MEXICO.

*** GEOTHERMAL POTENTIAL BASED ON THE CENSUS OF MORE THAN 1,300 HOT SPOTS ESTIMATED BY THE FEDERAL ELECTRICITY COMMISSION.

ENERGY REFORM

KEY ELEMENTS

STRENGTHENING
LEGAL AND REGULATORY
FRAMEWORKS

SECONDARY LEGISLATION

REGULATORY BODIES
(CRE, CNH, ASEA)

NEW ELECTRICITY MARKET

PRODUCTIVE STATE
COMPANIES (PEMEX & CFE)

INDEPENDENT SYSTEM
OPERATOR
(CENACE & CENAGAS)

FINANCIAL MECHANISMS

NEW TAX REGIME

NEW FUNDS*

INFORMATION AND
TRANSPARENCY

NATIONAL INVENTORY OF
RENEWABLE ENERGY

VUER

* FUNDS: MEXICAN PETROLEUM FUND, PUBLIC TRUST FOR THE PROMOTION AND DEVELOPMENT OF NATIONAL ENERGY INDUSTRY SUPPLIERS AND CONTRACTORS, SENER-NAFIN FUND, AND UNIVERSAL POWER SERVICE FUND

ENERGY REFORM

POWER GENERATION

	2014	2015	2016
NEW ELECTRICITY MARKET	<ul style="list-style-type: none"> ⇒ CENACE: OPERATES THE ELECTRICITY SYSTEM AND MARKET (NOV) ⇒ INTERCONNECTION CRITERIA (DEC) 	<p>WHOLESALE ELECTRICITY MARKET</p> <ul style="list-style-type: none"> ⇒ PUBLICATION OF CRITERIA (FEB) <ul style="list-style-type: none"> ▪ OPERATIONAL RULES (JUL) ▪ INFORMATION SYSTEM TESTING (OCT) <p>DEVELOPMENT PROGRAM FOR THE ELECTRICITY POWER SYSTEM (JUL)</p>	<ul style="list-style-type: none"> ▪ OPERATION OF THE WHOLESALE ELECTRICITY MARKET (JAN)
CLEAN ENERGY CERTIFICATES (CLEs)	<ul style="list-style-type: none"> ⇒ GUIDELINES (OCT) 	<ul style="list-style-type: none"> ▪ REQUIREMENTS OF CLEAN ENERGY BY 2018 (MAR) 	
GEOHERMAL ROUNDS ZERO AND ONE		<ul style="list-style-type: none"> ⇒ CFE PRESENTED A REQUEST FOR GEOHERMAL FIELDS (JAN) ▪ RESULTS FOR CFE (JUL) ▪ OPEN BIDDING FOR GEOHERMAL FIELDS (AUG) 	

ESTIMATED TOTAL INVESTMENT, MMD

POWER GENERATION

23,790

3,300 PIE's

NATIONAL
TRANSMISSION GRID

4,450

TOTAL

31,540

POWER GENERATION: INVESTMENT REQUIREMENTS

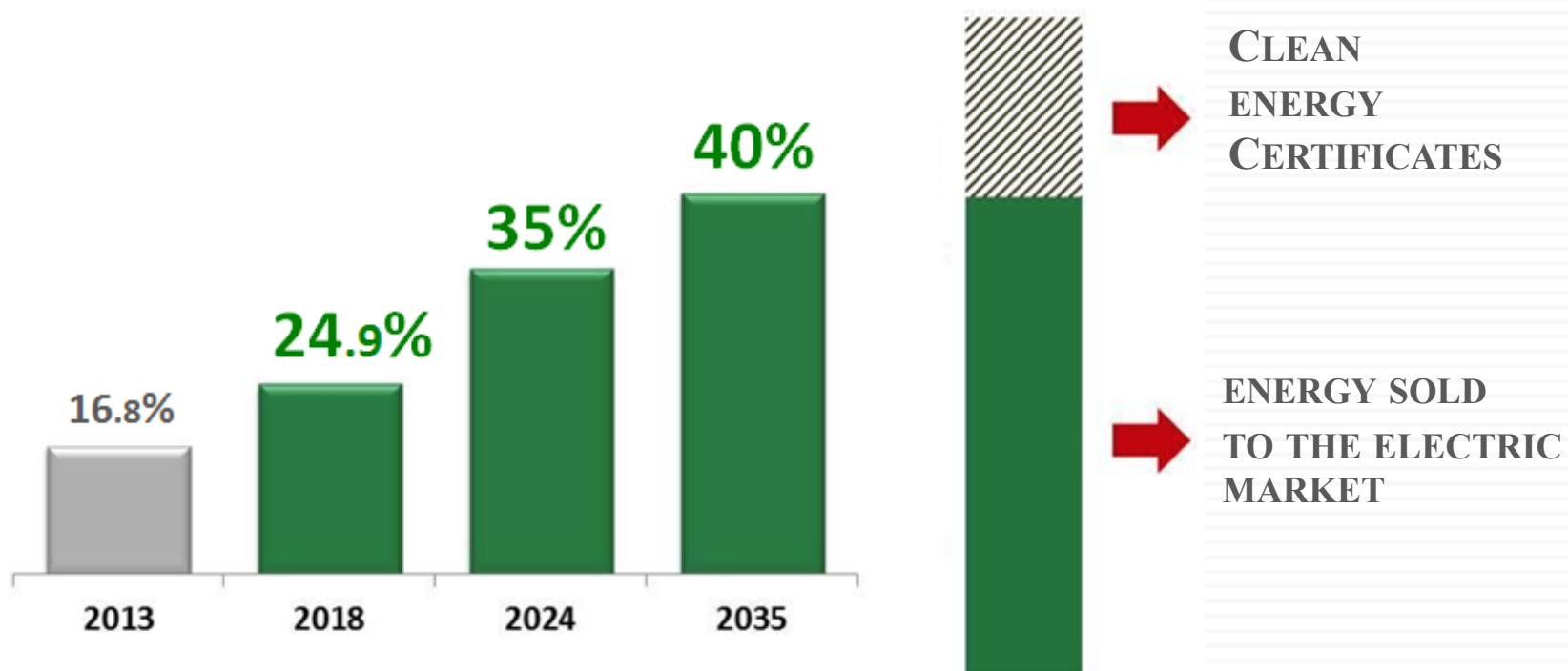
(ESTIMATED TOTAL INVESTMENT: 20.2 BILLION USD)



POWER SECTOR: TRANSMISSION AND DISTRIBUTION (ESTIMATED TOTAL INVESTMENT: 16 BILLION USD)

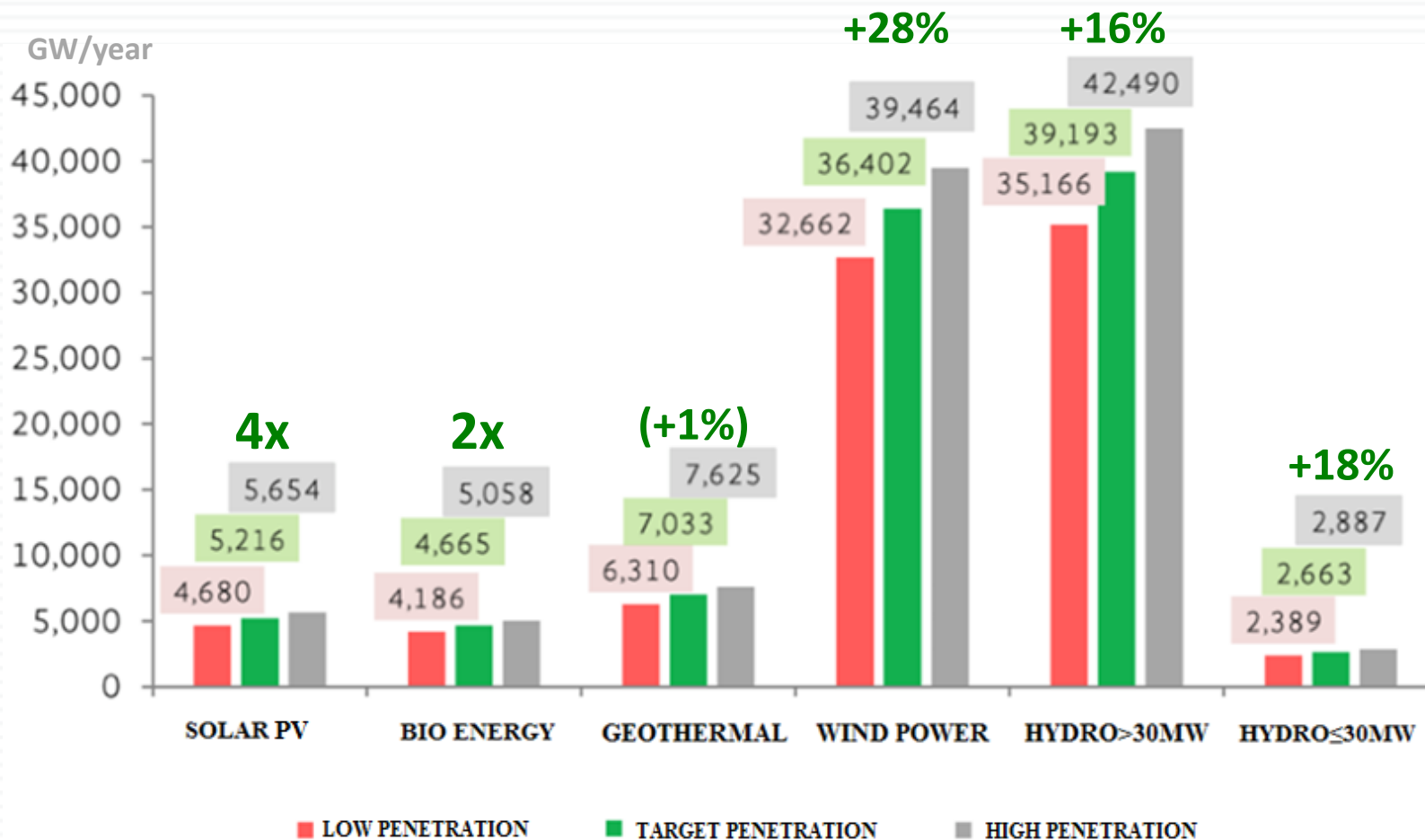


CLEAN POWER GENERATION NATIONAL TARGET / CERTIFICATES



RENEWABLE ENERGY

ESTIMATED POWER GENERATION, 2028

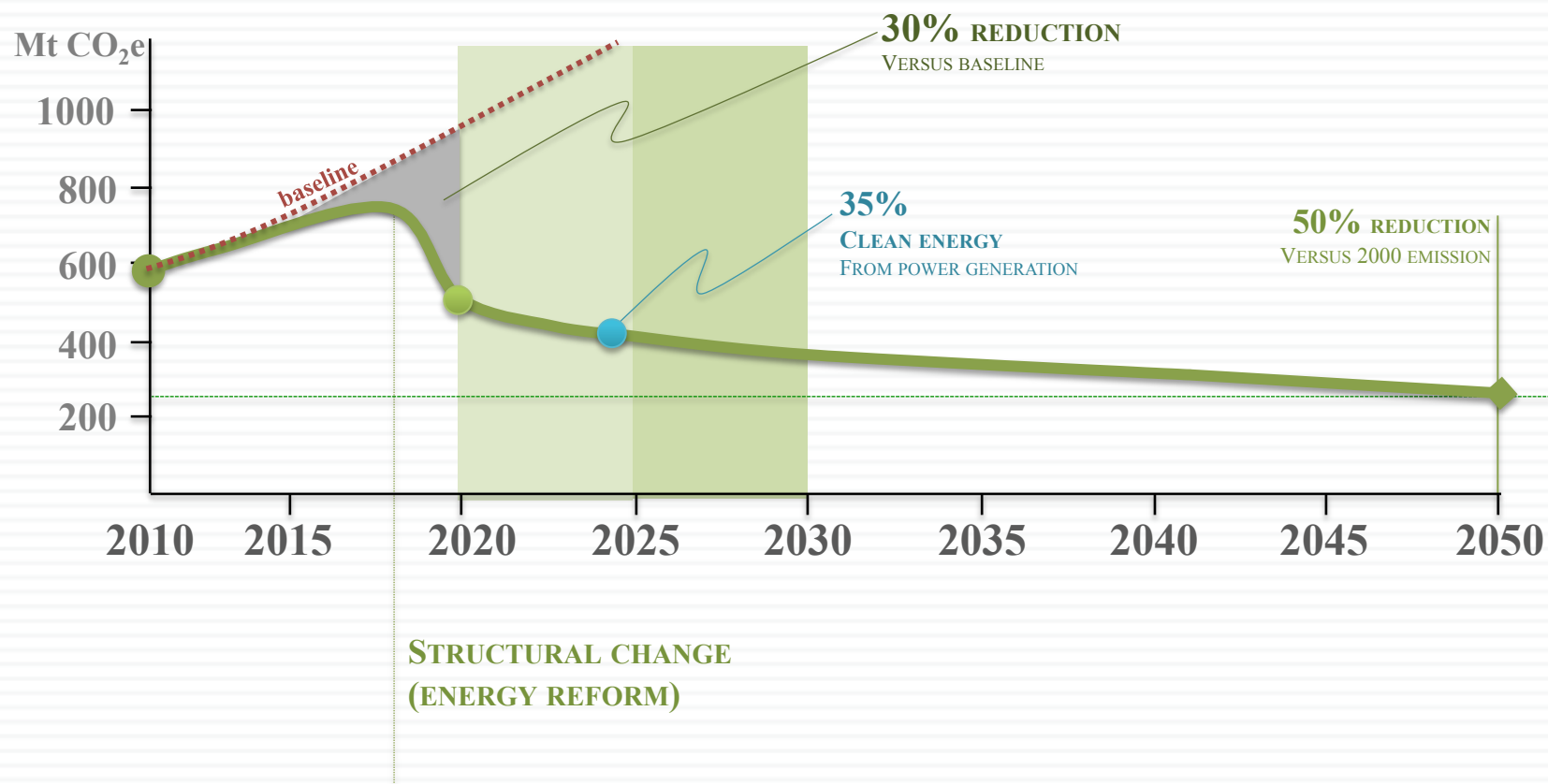


NATIONAL TARGETS FOR LOW CARBON ECONOMY

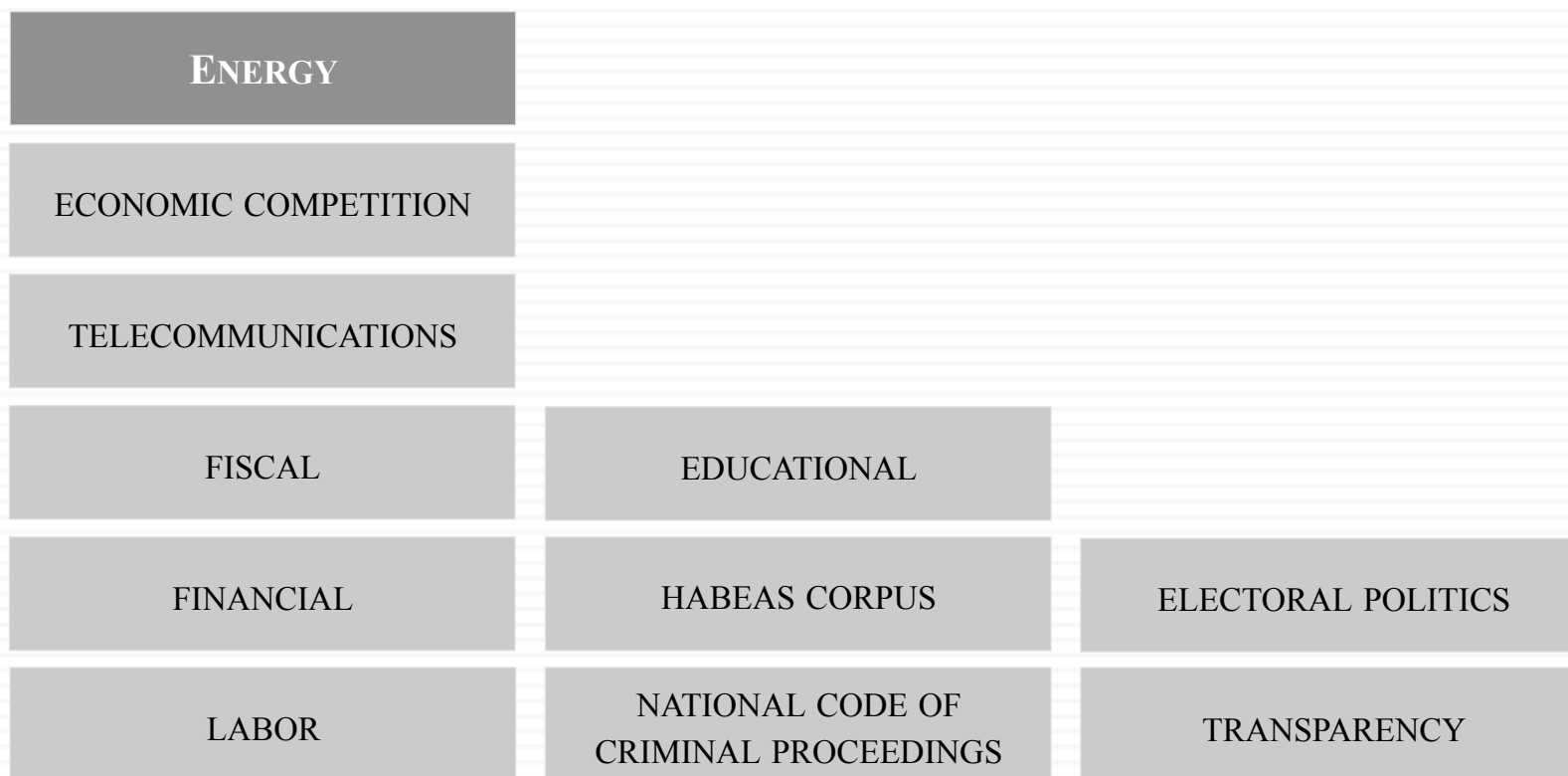
GENERAL CLIMATE CHANGE LAW

CONDITIONAL TARGET 2020 AND 2050

ESTIMATED EMISSIONS THEORETICAL ROAD MAP



STRUCTURAL REFORMS



OBJECTIVES

