

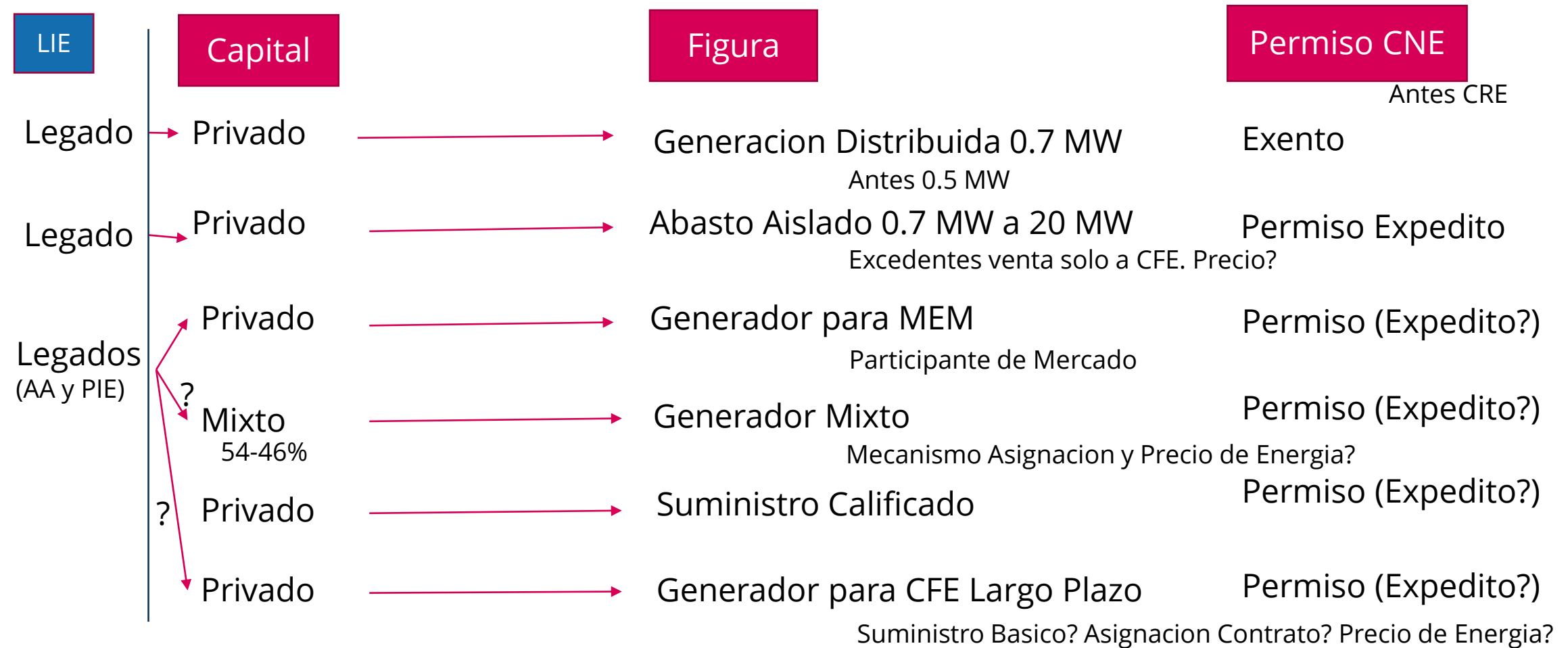
Esquemas Industria Electrica 2025



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Mecanismos de Participación Privada



Pendiente de revisar

Consideramos que son esquemas y noticias muy **positivas** y un gran **avance** en beneficio de una **prosperidad compartida del sector**.

A reserva de revisar la legislación a ser publicada en breve y en adición a las preguntas que tentativamente resaltamos en la lamina anterior, creemos que algunos de los principales puntos que deberán analizarse por el sector, de manera enunciativa, son los siguientes.



Barreras Generador MEM

Entender como funcionara y se **implementara** el porcentaje del 54% en todos los esquemas de Generacion de Largo Plazo vs. Mercado.

Contratos

Pendiente revisar **asignacion, tarifas y modelos** contractuales de: (a) generacion mixta y (b) compraventa a largo plazo para CFE. Eso se vera en la legislacion secundaria y otros cuerpos.

Bancabilidad

Los Contratos para implementacion de ambos esquemas deberan contar con **estandares de bancabilidad** minimos para su financiamiento y garantias *Project Finance*.

Solucion Controversias

Esperariamos que se cuenten con **mecanismos alternos** que la industria conoce y ha probado exitosamente en el pasado (peritaje, ICC, etc)

Transmision

Por el momento, no se mencionan mecanismos tipo OPF que permitan proyectos **llave en mano** para coadyuvar en el credimiento de este importante segmento. Operacion de CENACE.

Suministro Calificado

Si bien lo anunciado no lo menciona y como lo hemos previsto, entendemos **que no existen cambios**.



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