

## ANNUAL CATALOG

### MEXICO'S ENERGY SECTOR Commercial and Policy Outlook Reports

**1999**

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MEXICO ENERGY MEXICO ENERGY INTELLIGENCE™ (ISSN 2380-6400) is a digital publication based in Houston since 1996 and edited by market analyst and historian George Baker, Ph.D. We synthesize business journalism and academic scholarship, analyzing law, regulation, policy, and institutional governance in Mexico's energy sector *from the perspective of regulated market solutions*. Subscribers are energy companies, regulators, trade associations, law firms and university libraries. Reports are distributed principally by paid subscription.

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## **PEMEX procurement pitfalls**

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**SUN, MAR 14**

## **Downward values for Pemex's oil reserves**

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**TUE, MAR 30**

## **Power savings outlook analysis by Rafael Friedmann**

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## **New Pemex oil and gas reserve estimates**

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**FRI, APR 2**

## **Natural gas price behavior**

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Discussion of the behavior of natural gas prices in Mexico and analysis of key drivers.

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**SAT, APR 3**

## **Pemex and CFE investment programs**

File **331**

Pages 1

Charts 0

Conference proceedings of the 5th annual symposium on energy and construction. A new publication includes the text as well as the view graphs and the clarity of the photocopy is better than the earlier texts. The presentations given in Villahermosa January 15-16 cover the investment programs of the government energy agencies for the next three years.

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**SUN, APR 4**

## **Delay in Congress regarding Zedillo Power Restructuring Initiative**

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**SAT, APR 10**

## **LPG markets in Mexico**

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**WED, APR 14**

## **Gasoline "markets" in Mexico**

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**THU, APR 22**

## **Pemex's new 2-volume study of Mexico's hydrocarbon reserves**

File **336**

Pages 2

Charts 1

Report on new publication by Pemex on reserves by 3-P system.

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**MON, APR 26**

## **Trade unionism in Mexico: Ben S. Stepansky & V. Fox**

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Report about trade unionism in Mexico: Ben S. Stepansky and V. Fox.

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**SAT, JUN 26**

## **Alphabetical listing and classification of Pemex fields**

File **347**  
Pages 1  
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Presents MEI's classification of Mexican oil and gas fields in a form useful to the explorationist. [42](#)

**FRI, JUL 2**

## **Natural gas import duty -- Reverse engines**

File **352**  
Pages 1  
Charts 0

Report on the mexican government decision to postpone the lifting of the natural gas import duty in reaction to the anti-dumping suit against Mexico. [43](#)

**TUE, JUL 13**

## **Anti-dumping complaint before US ITC. Alarm sounded**

File **353**  
Pages 1  
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Comments on the anti-dumping complaint raised before the US ITC. [44](#)

**FRI, JUL 23**

## **Media crisis over Cantarell Project**

File **354**  
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Report about the rumors and allegations of poor management and corruption in the development of the Cantarell project. [45](#)

**SAT, JUL 24**

## **New LPG regulations**

File **355**  
Pages 3  
Charts 0

On June 28, 1999 the Mexican government published in the Diario Oficial the long awaited revisions to regulations governing the trade, transportation, storage and distribution of LPG. The new regulations replace those of 1993. [46](#)

**THU, JUL 29**

## **Anti-dumping complaint before US ITC. Likely economic consequences**

File **356**  
Pages 1  
Charts 0

Discussion of the possible economic consequences of the anti-dumping complaint before the US ITC. [47](#)

**FRI, JUL 30**

## **MEI inventory of Pemex oil and gas fields: Northern fields**

File **357**  
Pages 14  
Charts 1

This report is a preliminary output from an MEI database of Pemex oil and gas fields. The 164 fields are those of the Burgos Basin and Sabinas Basin, which, in the database, are grouped together under the heading of Northern Border E&P Region. The goal of this database is to capture data on the basic geology, location, type, discovery year and cumulative production of each field.. [48](#)

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**WED, AUG 4**

## **Petrochemical privatization outlook**

File **358**

Pages 2

Charts 0

Review of attempts to upgrade and privatize Pemex Petrochemicals (PPQ) assets.

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**THU, AUG 5**

## **Anti-dumping complaint before US ITC. Settlement outlook**

File **359**

Pages 1

Charts 0

Discussion of a possible settlement in the anti-dumping complaint before the US ITC.

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**FRI, AUG 6**

## **“Mexico’s Energy Sector: Challenges for 21st Century”**

File **360**

Pages

Charts 0

Analysis of a paper presented by Energy Undersecretary Jorge Chavez at the luncheon program sponsored by the Interamerican Chamber of Commerce, held in Houston on August 6, 1999.

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**SAT, AUG 7**

## **Pioneers in Mexican geophysics after 1938**

File **361**

Pages 2

Charts 0

Profile of Santos Figueroa, a prominent figure of Pemex’s initial exploration efforts.

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**MON, AUG 9**

## **Anti-dumping complaint before US ITC. Resolved.**

File **362**

Pages 2

Charts 0

Resolution on the oil anti-dumping complaint before the US ITC.

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**THU, AUG 19**

## **Availability of upstream data**

File **363**

Pages 1

Charts 0

Discussion of Pemex policy about releasing information and data corresponding to the upstream.

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**FRI, AUG 20**

## **Year 2000 election (Part 4). Gary Hart of Mexican politics?**

File **364**

Pages 1

Charts 0

Discussion of the race to presidential candidacy by PRI pre-candidates.

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**SAT, AUG 21**

## **Outlook for regulated tariffs**

File **365**  
Pages  
Charts 1

Forecast of CFE regulated tariffs until 2009 using MEI software tool, KWMex.

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**THU, SEP 2**

## **Mexican critique of Pemex (Ramirez de la O)**

File **366**  
Pages 2  
Charts 0

Press article criticizing the oil sector organization in Mexico.

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File **367**  
Pages 2  
Charts 0

Analysis of Mexican presidential cycles and the derived business cycle.

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**FRI, SEP 3**

## **Pemex Board of Directors**

File **368**  
Pages 2  
Charts 0

Analysis of the organization of Pemex's Board of Directors and its limited role in energy policy design.

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**SAT, SEP 4**

## **Pemex July 1999 statistics**

File **369**  
Pages 2  
Charts 0

Report on Pemex's production and trade statistics for crude oil, petroleum products and natural gas for July 1999.

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**MON, SEP 13**

## **Presidential electoral politics and energy policy**

File **370**  
Pages 3  
Charts 3

This report describes the uncertainty surrounding the selection of the PRI candidate for the presidential elections of 2000, and comments about the competition between Roberto Madrazo and Francisco Labastida. The accomplishments and shortcomings in energy policy of presidents Carlos Salinas and Ernesto Zedillo are itemized.

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**WED, SEP 22**

## **Information policy as a constraint on investment in the energy sector**

File **371**  
Pages 5  
Charts 3

This report draws on an internal database that reports Pemex's published data on reserves for selected fields for the Northern Region by geological basin and sub-basin.

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**SUN, OCT 3**

## **Zedillo Score Card in Energy**

File **100399**  
Pages 2  
Charts 1

This a summary of a keynote address at the British American Chamber of Commerce in Mexico City on Energy Day, Oct. 5, 1999. The address analyzed indicators of a transition in the energy sector from a command economy to a market economy. A table lists segments of the energy value chain and asks if a market proposal had been submitted and, if so, implemented. Published in the newsletter of the Chamber, pp. 16-17.

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**SUN, OCT 10**

## **Zedillo Energy Scorecard**

File **373**  
Pages 2  
Charts 1

Discussion of the progress made by the Zedillo administration in opening the natural gas and LPG markets.

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**MON, OCT 18**

## **Government procurement in the energy sector**

File **372**  
Pages 1  
Charts 0

Review of the delays in the Cadereyta refinery upgrading and government procurement in the energy sector.

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**FRI, OCT 22**

## **Transition to a market economy in the energy sector: obstacles**

File **374**  
Pages 4  
Charts 0

British Chamber of Commce address by George Baker: "Transition to a market economy in the energy sector: obstacles"

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**TUE, OCT 26**

## **Oil production, by basin, 1989-98**

File **375**  
Pages 5  
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Report on oil production statistics by geological basin for the period 1989-1998. The tables were presented at the 1999 Energy Day sponsored by the British Chamber of Commerce of Mexico.

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**FRI, NOV 12**

## **CRE vs. Pemex in future gas sales**

File **377**  
Pages 1  
Charts 0

Report on the CRE search for regulatory models of natural gas markets to have open access on PGPB pipeline system. CRE commissioners are pondering a regulatory and legal dilemma: They have been warned by outside academic consultants that unless Open Access takes place on Pemex's pipeline system the entire market reform in both natural gas and electricity is in jeopardy. They are asking themselves the question, Should we be following the Argentine or the American model of gas deregulation?

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**SAT, NOV 13**

## **Topic: Year 2000 Elections (Part 5): Outcome of PRI primary elections**

File **376**  
Pages 1  
Charts 0

Discussion of the outcome of the PRI presidential primary elections and the outlook for energy policy in the case of a PRI victory.

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**SUN, NOV 14**

## **Gas "self-supply" associations as LDC competitors**

File **379**  
Pages 1  
Charts 0

Analysis of the regulatory concept of self-supply organizations in natural gas and their impact on competition. The Mexican concept of "auto-abastecimiento" (self-supply) is a peculiar feature of Mexican energy regulations, one probably created at the instance of industrialists from Monterrey, where the largest self-supply associations in gas and power are found. The feature permits companies to band together to either petition Pemex, in the case of gas, for service, where, otherwise, any one company's load might be too small to be seen in Pemex's searchlight.

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**MON, NOV 15**

## **Outlook for natural gas storage**

File **378**  
Pages 1  
Charts 0

Natural gas storage was opened to private investors in the presidential decree of November 5, 1995; but, to date, it has been an investment opportunity without investors. On July 26, 1996, an explosion at Pemex's major gas processing facility at Cactus took some 1.0 Bcfd of burner tip gas out of the market for more than a week (MEI 96-127). The offshore, associated gas was flared. Pemex on that day certainly wished that it had invested in gas and LPG storage or had encouraged others to do so.

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**WED, NOV 17**

## **Two meanings of PRI for Mexican voters**

File **380**  
Pages 1  
Charts 0

An analysis of why mexican voters have not tossed out the PRI from government in 70 years.

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**THU, NOV 18**

## **Pemex Sept. statistical report**

File **381**  
Pages 2  
Charts 0

Report on Pemex production and trade statistics for crude oil, petroleum products and natural gas for September 1999.

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**FRI, NOV 19**

## **Legal and Institutional Issues Afecting Power Restructuring**

File **382**  
Pages 1  
Charts 1

Discussion of presentations on the power sector given at a panel held in New Orleans on November 5th sponsored by the Mexico Committee of the American Bar Association. The third panelist, from the private sector, focused on legal, regulatory and market obstacles standing in the way of a real market opening in the electric power sector. The paper began with a critique of the pending neoprotectionist legislation regarding Government procurement and public works.

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**THU, DEC 9**

## **Rice U. panel: Can the effect of competition be imported?**

File **383**  
Pages 1  
Charts 0

Reviews the discussions about natural gas pricing in Mexico during the electricity panel at the NAFTA conference of Dec. 6-7.

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**FRI, DEC 10**

## **Houston Access Mexico 99 conference on NAFTA**

File **384**  
Pages 1  
Charts 0

"Mexico Access" symposium, sponsored by the Greater Houston Partnership and the Consulate General of Mexico, among others, was held in Houston December 6-7. The theme of this year's conference was "The Five Years of Nafta. Past and Future."

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**WED, DEC 15**

## **Resignation of Adrián Lajous as CEO of PEMEX**

File **386**  
Pages 1  
Charts 0

Discussion of the possible motives of the resignation of Adrian Lajous as CEO of Pemex. Three scenarios are analyzed.

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**MON, DEC 20**

## **Pemex natural gas production, by basin and reported field, 1989-98**

File **385**  
Pages 9  
Charts 2

This report provides an analysis of Pemex natural gas production, by basin and reported field, 1989-98. As Pemex does not provide production information by basin, this report is based on our internal matching of fields and basins.

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**TUE, DEC 28**

## **1999 energy policy balance: market advocates vs. central planners**

File **387**  
Pages 1  
Charts 0

Summary of energy policy balance during 1999: market advocates vs. central planners. The Mexican energy sector is one that is in transition from a command to a market economy. In 1999 the management of the sector was the scene of a struggle between state planners and market advocates. With few exceptions, the state planners and their political and institutional allies held their ground. One result is that the outlook for business development favors projects in which private investors operate as contractors to the State-owned energy companies; the outlook for a role for private industry as competitors is problematic.

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**WED, DEC 29**

## **Energy sector publications of interest to Mexico watchers**

File **389**  
Pages 1  
Charts 0

This report discusses four commercially available publications of interest to the Mexico energy community. One of these, EL FINANCIERO INTERNACIONAL, has closed. Other publications mentioned include ENERGY OUTLOOK, LA CARPETA PURPURA and PETROLEO Y ELECTRICIDAD.

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**THU, DEC 30**

## **MEI reporting in 1999**

File **390**  
Pages 1  
Charts 2

Summary of MEI activities during 1999. In 1999 MEI published 85 field and analyst reports (Table 1). Field reports draw on meetings, discussions—and rumors—, while analyst reports draw on published and internal data). These reports, which since March have been issued in both PDF and print versions, cover some 20 topics: the most frequent topics were Upstream (14), Electric power (11), Energy policy (8) and Pemex monthly statistics (7) (Table 2).

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FRI, DEC 31

## End-of-millennium reflections on Mexican outlook

File 388  
Pages 1  
Charts 0

End-of-millennium reflections on Mexican outlook. A December 28 *New York Times* editorial argued that the outlook for economic growth in the next millennium is highest in countries with democratic values and a free-market economy. Individual freedom of choice is the common thread linking political and economic values. How would Mexico score on an individual freedom index? Considerations on the reasons for such a political situation are included.

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