

## ANNUAL CATALOG

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

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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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**SUN, JAN 28**

## **Past, prospective and future Pemex CEOs**

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On January 13th, Government and Industry settled on a \$4 price for natural gas for 3 years, in effect dumping the CRE’s pricing formula. **7**

**MON, FEB 12**

## **Recentralization of Pemex governance**

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## **New model for Mexican energy sector?**

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**WED, MAR 7**

## **Fox names outside members to corporate Board of Directors of Pemex**

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## **Profile of Pemex petrochemical output, sales and trade, 1995-2000**

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A survey of aggregate statistics and selected individual products for Pemex's petrochemical operations, 1995-2000. [20](#)

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<b>THU, JUN 28</b>	<b>"Green Economist" Overture: gas market forecasting in Mexico</b>	
File 516	The slowing down of the U.S. economy instantly affects Mexico's outlook for economic growth, and, indirectly, the outlook for the demand of natural gas by industrial, power and commercial markets. The Energy Ministry's forecast of a doubling of natural gas demand in the next 10 years, to 8-9 Bcfd-, a level that Pemex says it cannot meet—"will likely need to be scaled back. As an export market for U.S. gas, demand may be a lot less than the roughly 1.8 Bcfd that some analysts see as a five-year forecast.	46
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**FRI, JUN 29**

## **Corruption in Mexico—old and new faces**

File **517**  
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The old face of corruption is seen in allegations in relation to Pemex's Oil Union have circulated for decades; the new face of corruption is seen in the the names of public officials accused of being on the payroll of the drug cartels. Not only have state governors been accused of criminal complicity at the end of the Zedillo administration, the country's anti-drug czar, Gen. Jesús Gutiérrez Rebollo, was discovered to be in the pay of the cartels. In one incident, the notorious La Quina accused his successor in the Oil Union of misappropriating billions of pesos.

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**MON, JUL 2**

## **Avoiding mistakes about energy policy “openings”**

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Updated 10/21/2002

An analogy is made about the two types of errors of statistical reasoning in relation to corporate strategy in Mexico's energy sector. An update of MEI 00-460 of December 12, 2000.

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**THU, JUL 5**

## **Pemex statistics through April 2001**

File **504**  
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Pemex operational volumes and prices through April 2001.

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**FRI, JUL 6**

## **Energy Ministry promotion of LNG in Altamira**

File **519**  
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Updated 7/17/2002

Comments on press announcements related to LNG projects: 1) May 23, 2001, that an agreement had been reach between El Paso Energy and Pemex Gas to build an LNG terminal in Altamira, 2) June 28, 2001 announcing an agreement between El Paso and Shell for the same. A year later, in May 2002, the players had changed.

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**SAT, JUL 7**

## **CFE compliance with environmental regulations**

File **520**  
Pages 2  
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Environmental policy and compliance of CFE fuel oil-fired plants. The CFE Tuxpan steam plant has been blocked by 300 fishermen affiliated to a cooperative. The blocking is a protest for the pollution generated by the power plant that directly affects the fishermen's catch.

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**THU, JUL 12**

## **LNG tender for Altamira**

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Review of history of Pemex Gas' interest in promoting an LNG terminal in Altamira.

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**FRI, JUL 13**

## **Presidential decree in the Electricity Sector Laws**

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Reactions to Presidential decree issued by President Fox and Ministry of Energy Ernesto Martens regarding the purchase of surplus capacity and energy by the CFE.

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**WED, JUL 18**

## **AMEE Conference, June 13-14, 2001**

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Comments on an energy conference held in Mexico City at the CIDE June 13-14, 2001.

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**SAT, JUL 21**

## **CRE decree on LNG: Progress to July 2001**

File **525**  
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Updated 7/21/2002

A report on the progress of CRE in regulating LNG activities in Mexico, including comments on a meeting held at the CRE on July 27, 2001 with some 50 prospective developers.

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**FRI, JUL 27**

## **Pemex product imports in 2000**

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Review of Pemex gasoline and diesel imports, by region and customs district, in the year 2000.

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**SUN, JUL 29**

## **LNG press bulletin**

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Reflections on the Energy Ministry press bulletin of June 28 about an LNG terminal in Altamira in which Energy Minister Ernesto Martens seemed to contradict Pemex Gas in relation to the procurement process.

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**MON, JUL 30**

## **Energy Sector Information Act**

File **526**  
Pages 9  
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Updated 1/23/2003

This report analyzes the lack of market discipline in energy sector reporting, and proposes measures to standardize reporting, units of measure and access to people, seminar presentations and data. The idea of an Energy Sector Information Act for Mexico is explored.

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**TUE, JUL 31**

## **Reinvention of Mexican politics**

File **528**  
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Provides contrasting views of performance of Fox Administration in relation to the economy and the legislative and judicial branches.

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**WED, AUG 8**

## **Opportunity costs of a closed natural gas market**

File **530**  
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Comments on the economic and political costs to Mexico of having a closed natural gas transportation market in Northern Mexico.

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**MON, AUG 13**

## **LNG terminal in Altamira: Optical illusion?**

File **531**  
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This report questions the logic of building an LNG terminal on the Mexican Gulf Coast. U.S. LNG terminal capacity would seem adequate to supply incremental demands, and LNG marketers will prefer U.S. prices and markets to those in Mexico.

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**TUE, AUG 14**

## **Mexican economy: How to anticipate growth, decline and energy requirements?**

File **532**  
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This report touches on the impact of the U.S. economy on the Mexican economy and its demand for natural gas and power. The report identifies shortcomings in the macroeconomic modeling of the Mexican economy.

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**FRI, AUG 24**

## **Unwritten rules in the Mexican business environment**

File **533**  
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Updated 12/27/2002

This report provides guidelines for professional and corporate survival in Mexico's business environment, with special reference to unwritten rules and the language of Mexico's oil patch.

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**SAT, AUG 25**

## **Wellhead-to-lightbulb integration? Advances in LNG and beyond**

File **534**  
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This report comments on the regulatory advances and pending issues in several areas of Mexico's energy sector: LNG, IPPs, midstream, upstream.

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**MON, AUG 27**

## **Field trip to Pemex Infrastructure**

File **537**  
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This report reviews highlights of visits to Pemex facilities, including a trip to the Cantarell Project infrastructure on August 17, 2001. The trip included a visit to Akal-C, the FSO ship Ta'kunah and the onshore nitrogen plant.

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File **536**  
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Through the literary vehicle of a partly-fictionalized dialog with a new-to-country manager, basic ideas about the nature of the information challenge in Mexico are presented. The report identifies several subtle difficulties facing business development managers in Mexico.

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**TUE, AUG 28**

## **Logic supporting LNG terminal in Altamira**

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This report identifies economic and policy factors that support the concept of an LNG terminal in Altamira.

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**FRI, AUG 31**

## **Modeling natural gas demand in an economic slow-down**

File **529**  
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This report examines the combined effect of U.S. and Mexican economic slow-down on Mexican natural gas demand for the period 2001-2009. This conclusions of the report differ from the Government's official forecast for this period.

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**FRI, SEP 7**

## **Family values in Mexican business culture**

File **538**  
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This report provides anecdotal data about ways in which family values and relationships in Pemex and CFE can enter into and affect business activities and outcomes.

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**TUE, SEP 11**

## **Triangulated upstream messages: Preview of Multiple Service Contracts**

File **539**  
Pages 5  
Charts 0  
Updated 3/14/2003

This report comments on the presentation at the Houston Geological Society on August 28, 2001 by Alfredo Guzmán, a senior Pemex geologist, on the subject of "Exploration and Production in México: Opportunities and Challenges." The presentation included an overview of Pemex's proposed Multiple Service Contracts.

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**SUN, SEP 16**

## **Internet and other resources for energy sector data**

File **540**  
Pages 3  
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This report introduces the problem of data research in Mexico's energy sector and notes key web sites, authors and books.

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**MON, SEP 24**

## **El Mundo de Petróleo después de Nueva York: Caso México**

File **092401**  
Pages 1  
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On September 20, 2001 (only a few days after international flights had been resumed in the United States after 9/11), George Baker gave a presentation at the Mexican Petroleum Institute (IMP) on the implications of the terrorist attacks for Mexico and Mexican oil. The speaker, who had visited Afghanistan 15 years before, discounted the idea that there would be an economic uplift from a military conflict. There was a 30-min. Q&A. *Gaceta IMP*, 2nd Series IV (No. 128), p. 7, Sept. 24, 2001 (includes a photo). The talk had been arranged Paulino Cárdenas, head of Pemex GIRP.

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**WED, OCT 3**

## **IMP address: World Oil after New York: Case of Mexico**

File **541**  
Pages 7  
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This report reconstructs the main points of the presentation given by George Baker to the Mexican Petroleum Institute on September 19, 2001. The Spanish PowerPoint slides are also available.

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**FRI, OCT 19**

## **Will there be a role for oil companies in Mexico, 2001-25?**

File **543**  
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This report is based on the oral presentation given at the Energy & Law conference co-sponsored by the ITAM and the Mexican Academy for Energy Law, which was held in Mexico City at the ITAM campus on October 11-12, 2001.

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<b>MON, OCT 22</b>	<b>Mexican reaction to terrorist attacks of September 11, 2001</b>		
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<b>WED, OCT 24</b>	<b>Second Annual ITAM/AMDE Seminar on Energy and Law</b>		
File	546	This report comments on the industry and policy seminar that was held in Mexico City Oct. 11-12, 2001 and cosponsored by the ITAM and the AMDE ( <a href="http://www.amde.com.mx">www.amde.com.mx</a> ).	76
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<b>FRI, OCT 26</b>	<b>International investors in Mexico's gas and power markets</b>		
File	547	This report examines economic and market data associated with the permits granted by the Energy Regulatory Commission (CRE) in the areas of gas and power. The analysis focuses on the concentration of market power by international companies, mainly European.	77
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<b>MON, OCT 29</b>	<b>Global business intelligence in IOCs and Pemex</b>		
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<b>SUN, NOV 4</b>	<b>Benchmarking Rumors on Multiple Service Contracts</b>		
File	548	This report brings together a number of the press leaks and comments given in industry and academic forums in recent months in relation to the new round of "multiple service contracts" that, for the first time, are intended to attract investments by oil and gas operating companies.	79
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<b>FRI, NOV 9</b>	<b>NIMBY a la mexicana</b>		
File	551	This report notes that local politics in Mexico can stop major projects, such as a golf course in Tepoztlán, for example. Local politics can also affect energy projects, as LNG terminal developers in Baja California have discovered. Several examples of popular opposition to commercial projects are cited.	81
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<b>FRI, NOV 16</b>	<b>Pemex corporate strategy as seen in the public record</b>	
File <b>553</b>	This report consolidates information made public by Pemex about its strategic directions and programs. The logic of the “multiple service contract” is described, and the political obstacles to success are identified.	<b>82</b>
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<b>TUE, NOV 20</b>	<b>Mexican Government Energy Program, 2001-06</b>	
File <b>554</b>	The report reviews the contents of the 150-page document issued in October by the Energy Ministry. The report gives an annotated table of contents and an assessment of its contribution to the debate over energy policy in Mexico.	<b>83</b>
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<b>TUE, DEC 11</b>	<b>Pemex’s Multiple Service Contracts: Preliminary analysis of policy, legal and political issues</b>	
File <b>555</b>	This report reviews the highlights of the proposed Multiple Service Contracts (MSC) that are intended to bring oil and gas companies into Mexico in an operational role. The report includes a comparison of the features and context of the new dry gas initiative with those of the legal figure of the Independent Power Producer (IPP).	<b>84</b>
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<b>TUE, DEC 18</b>	<b>Virtual upstream opening in Mexico</b>	
File <b>556</b>	This report reviews points of law, politics, history and language related to the breakfast presentation on December 6th of the Multiple Service Contract (MSC) by Pemex and the Energy Ministry. What was presented in bureaucratic language as business as usual (but with a twist of lemon) is the beginning of an upstream opening in Mexico.	<b>85</b>
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<b>MON, DEC 24</b>	<b>Competition in Mexico’s motor oil market?</b>	
File <b>558</b>	Analysis of the legal and economic arguments of Mexlub in relation to the Federal Competition Commission resolution against Pemex’s refinery unit for monopolistic practices in the motor oil and lubricants market. Update of the legal and financial status of Mexlub.	<b>86</b>
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<b>WED, DEC 26</b>	<b>Off-balance-sheet investments (PIDIREGAS) in energy sector</b>	
File <b>557</b>	Pidiregas is an off-balance sheet financial framework developed by the Mexican government to attract private capital with minimum changes in the law and the Constitution. This report provides an overview of this program. The main body of the report is in Spanish with an introduction and summary in English.	<b>87</b>
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<b>SAT, DEC 29</b>	<b>LNG progress and challenges</b>	
File <b>544</b>	This report reviews developments in the regulatory development cycle of the last five months of 2001 (and first five months of 2002) that affect LNG operations in Mexico. The report also examines issues that surpass the regulatory authority of the CRE and that could negatively affect the success of an LNG project.	<b>88</b>
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File **559** An introduction to the theory and practice of transfer pricing, with an emphasis on energy **89**  
Pages 13 firms. This 12-page report provides an overview of the regulatory framework governing  
Charts 1 transfer pricing rules in Mexico and an appendix that describes the associated paperwork  
and reporting requirements of Mexican tax authorities.

## SUN, DEC 30

### Social engineering of business development meetings in Mexico

File **560** Sales calls in Mexico's energy sector are not only about the features and benefits of a **90**  
Pages 3 proposed technology, project or service; they also have an intelligence-gathering function.  
Charts 2 The report provides a checklist of protocol and intelligence issues for meetings with  
formal presentations.

## MON, DEC 31

### UNAM Seminar on Natural Gas

File **561** On Dec. 3, 2001 the Energy Studies Program of the National University in Mexico City **91**  
Pages 3 (UNAM) organized a 3/4 day conference on upstream, midstream and downstream  
Charts 1 issues on natural gas. This report provide highlights of the presentations.