

ANNUAL CATALOG

MEXICO'S ENERGY SECTOR Commercial and Policy Outlook Reports

2003

FRI, JAN 10

Statistics on Mexico's power sector

File **623**
Pages 5
Charts 0

This report provides a short, annotated bibliography of the public and semi-public publications that provide statistics on Mexico's power sector. Such publications often hide more than reveal; but, in the land of the blind, the one-eyed statistician is king.

1

FRI, JAN 24

A guide to data publications on Mexico's oil and gas industry

File **624**
Pages 6
Charts 0

This report provides a guide to statistical publications on Mexico's oil and gas sector. The information that is publicly available provides a starting point for any serious evaluation of industrial, commercial and policy issues.

2

MON, FEB 3

Odyssey of Pemex's Multiple Service Contracts, 1991-2003

File **629**
Pages 10
Charts 1
Updated 9/4/2003

This report traces the unpublished highlights of the evolution of the MSC strategy from the early 1990s through August 2003, and identifies some of the pluses and minuses of the concept from the point of view of prospective bidders for whom to bid or not to bid is the question. Update 1 (Sept. 5, 2006) examines the revised version of the concept as promoted by the Fox administration in the final months of its term.

3

TUE, FEB 4

Business correspondence in Mexico's energy sector

File **628**
Pages 10
Charts 0
Updated 12/12/2003

This report documents some of the unwritten rules of written as well as spoken communication in Mexico's public sector. It describes standard conventions in business correspondence in Mexico's energy sector, and points out eight measures to avoid personal and corporate embarrassments. A discussion of Mexico City's "courtly" manners provides the background for understanding the institutional forms and attitudes found and required to succeed in Mexico's public sector.

4

MON, FEB 17

Integration of LNG and IPP projects in Mexico

File **627**
Pages 12
Charts 3

This report provides an overview of the history of the idea of an LNG regasification terminal in Mexico. The concepts and impact of the CFE's tender issued on December 24, 2002, are discussed, particularly in relation to the rescheduling of IPP projects in the Altamira region. Risks faced by policy and economic actors are identified.

5

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.

ANNUAL CATALOG

2003

FRI, FEB 28

MEI 619, corrections and critique of George Baker report

File **632**
Pages 10
Charts 3

This report presents the original report MEI 619 prepared by Fernando Ramírez and offers a critique of the apocryphal report that was actually sent to subscribers by George Baker. It also questions the ethical values of George Baker who changed the contents, scope, purpose and conclusions of the original report without ever asking me of such changes.

6

THU, MAR 6

Pemex Upstream Technology Week, 2003

File **631**
Pages 7
Charts 6

This report provides a critical assessment of Pemex's upstream technology week, which was held in Veracruz, February 13-19, 2003 and included technical courses, trade exhibits and professional papers. The events provided a forum for distinct stakeholders in Mexico's energy sector to express their views, report scientific and technological results and, for exhibitors, sell their products and services.

7

FRI, MAR 7

Why can't Mexico communicate in English?

File **622**
Pages 6
Charts 1
Updated 3/8/2003

This report offers reflections on the closing on December 31, 2002, of two Mexico City newspapers, *Novedades* and *The News*. In the case of *The News*, its political function was to promote Mexico's image to English-speaking tourists and business visitors.

8

THU, MAR 13

Mexico's vote on the Security Council regarding Iraq

File **634**
Pages 5
Charts 0
Updated 3/14/2003

This report examines the logic of Mexico's vote in the United Nations Security Council regarding the use of force in Iraq. Mexico has additional reasons to support the U.S. independently of Mexico's views on Iraq.

9

WED, MAR 26

Greenfield petrochemical projects in Mexico: Case studies

File **633**
Pages 15
Charts 6
Updated 3/26/2003

This report provides an overview of two attempts during 1998-2001 by the Mexican developer Serbo Corp. Corp. to implement its vision of a new urban complex consisting of an industrial park for investors in petrochemical plants, commercial facilities and surrounding residential housing and services. The billion-dollar project, had it succeeded, would have resulted in Ciudad Altamira. Serbo's vision is scheduled to be reborn in 2003 as Project Phoenix, with the difference that the developer and anchor customer will be Pemex's chemical unit.

10

MON, MAR 31

Oil Expropriation Day 2003

File **635**
Pages 9
Charts 1
Updated 3/31/2003

This report treats the annual commemoration held on March 18th of the expropriation of the oil industry in Mexico in 1938. For the first time, the event in 2003 was held without the presence of the president of Mexico.

11

ANNUAL CATALOG

2003

MON, APR 7

Pemex, S.A.: A RPI proposal for private Pemex financing

File **636**
Pages 10
Charts 1
Updated 4/18/2003

This report provides an overview of a legislative proposal presented by two PRI congressmen in mid-December 2002 to reorganize Pemex into a "public interest corporation" where 10% of the stock would be open to Mexican investors and retirement fund managers. The proposal has far-reaching implications, as its goals would require new measures of transparency and accountability. The outline and text of the bill, with English headings, is appended. See <http://gaceta.diputados.gob.mx/Gaceta/58/2002/dic/20021215.html>

12

WED, APR 16

Aftershocks in NAFTA over Iraq

File **637**
Pages 7
Charts 0
Updated 4/17/2003

This report comments on an address given on April 8, 2003 by Peter Godsoe, chairman of Scotiabank, to the Canadian Chamber of Commerce of Mexico. The banker expressed concern about possible future reprisals against Canada and Mexico for their respective decisions not to support the Bush Administration's position regarding Iraq.

13

SUN, APR 27

Risk exposure for contractors in the Mexican upstream

File **639**
Pages 13
Charts 0
Updated 2/17/2014

Contractors and subcontractors face an array of normal business risks in pursuing business opportunities in Mexico's upstream. Risks are those contained within the terms of the contract as well as other types of risk that arise from the operating environment. This report contrasts the perceptions of risk by oil companies and oilfield service companies in relation to MSCs. It also considers risks in relationships and contracts with local companies in Mexico.

14

FRI, MAY 2

Pemex MSC Technical Workshop

File **640**
Pages 6
Charts 9
Updated 5/22/2003

Pemex's final orientation workshop for prospective bidders and contractors for the upcoming tenders of the Multiple Service Contracts (MSC) was held at its Data Room in Reynosa on April 28-29, 2003. This report provides an overview of topics discussed (and not discussed), tables and two approximate maps showing the political divisions in which the blocks are located. A partial list of participating companies, by category, is also included.

15

FRI, MAY 30

Presidential Elections, 2006

File **643**
Pages 8
Charts 1
Updated 10/27/2003

The midpoint in the Fox presidency is an inflection point for aspirants to his job for the period 2006-12. This report reviews the political culture of Mexico under the PRI and comments on the strengths and weakness of the three major parties as well as the persons who appear to be the leading presidential candidates: Francisco Barrio, Roberto Madrazo and Andrés Manuel López Obrador.

16

WED, JUN 11

Legal reform as trigger event in Mexico's energy sector?

File **644**
Pages 11
Charts 1

This report asks if the Fox Administration is planning a reengineering of the legal foundation of the Mexican State. The report mentions two seminars held in April and May 2003, one at Harvard and the other at the Iberoamericana University. The policy issues discussed in these seminars present a preview of possible future developments in the energy sector.

17

ANNUAL CATALOG

2003

MON, JUN 23

Risk exposure in the permitting process in Mexico

File **641**

Pages 12

Charts 2

The problematic character of permits is one that confronts all business activities in Mexico, from office space to industrial facilities. In a number of instances, permits have ignited controversy instead of resolving issues. Contractors with federal permits occasionally find themselves facing municipal and state opposition in addition to opposition from landowners, citizen groups and NGOs.

18

MON, JUN 30

Outlook for Energy Cooperation in the U.S.-Mexican Border Region

File **063003**

Pages 16

Charts 0

This essay was based on a seminar paper for a conference on "Trade, Energy, and the Environment: Challenges and Opportunities for the Border Region, Now and in 2020," Rio Rico, Ariz. April 30-May 2, 2001. The papers were published as *The U.S.-Mexican Border Environment* (San Diego State University Press, 2003). For the essay by George Baker, see pp. 247-63).

19

FRI, JUL 4

Mexico's midterm elections: The invisible political machinery

File **646**

Pages 12

Charts 9

This report outlines the history and electoral machinery of elections in Mexico. An upcoming policy struggle over energy reform appears in the tea leaves of the profiles of PRI candidates for congress and governors in the midterm elections of July 6, 2003. The report explains and details the institutions of conscription and *plurinominal*, and provides a list of the top-listed candidates for each conscription and party.

20

FRI, JUL 25

Natural gas pricing crisis in Mexico

File **647**

Pages 12

Charts 1

This report discusses the widening gulf between Pemex and Mexican industry in relation to gas pricing philosophy. The 36-month period of a special "Mexico price" for industrial consumers ends in December 2003. Pemex proposes a return to U.S.-indexed pricing while industry wants a formula price based on a basket of gas prices that includes those paid by Mexico's trading partners outside of the U.S. and Canada, especially China.

21

FRI, AUG 8

Fox's off-grid energy policy

File **649**

Pages 11

Charts 0

This report examines the ad hoc negotiations and initiatives that have passed for energy policies in the first half of the Fox administration. In chronological order, since December 2000, topics include natural gas pricing, electric reform, Multiple Service Contract, lubricants market liberalization, LNG regulations, petrochemical investments (Project Fénix)—and again, in August 2003, natural gas pricing.

22

FRI, AUG 15

MSCs: Congress pushes back—but too late?

File **645**

Pages 13

Charts 1

Updated 4/21/2004

This report examines Pemex's original arguments supporting the MSCs and the criticism, doubts and concerns that have come to surround them. The MSC program is seen as a catalyst that has opened Pemex's political culture. This report was updated on April 21, 2004 after the vote in the Lower House not to proceed with a request for a constitutional review by the Supreme Court.

23

ANNUAL CATALOG

2003

TUE, AUG 19

China as test case for basket pricing of natural gas

File **648**
Pages 8
Charts 3

Direct foreign investment in Mexico peaked in 2001, but fell in 2002 and again in 2003. Mexican industry in a letter to President Fox dated July 1, 2003 argued that jobs and markets were being lost because Mexico's competitors enjoyed lower input costs for power, natural gas and refined products. They proposed to internationalize Mexico's gas pricing to include a basket of countries. This report inquires about the feasibility of this approach in the case of China.

24

THU, SEP 4

Crystal-balling the winners of the MSC tenders

File **652**
Pages 10
Charts 3
Updated 1/16/2003

This report identifies qualitative factors that could favor the outcome of the tenders for Pemex's first round of tenders for the Burgos Multiple Service Contracts. The predictions are based on the relative interest shown by prospective bidders at site visits, taking also into account Pemex's traditional preferences in out-sourcing services by international companies.

25

TUE, SEP 23

Altamira LNG: Has the other shoe dropped?

File **655**
Pages 11
Charts 2
Updated 10/3/2003

This report reviews the unusual history of LNG promotion in Altamira, Tamaulipas, and asks if the award on Sept. 11, 2003 of an international tender to the sole bidder, Gas del Litoral, ends--or fuels--controversy about public policy in relation to gas supply and pricing in Mexico.

26

TUE, SEP 30

Gas distribution in Mexico: LPG vs. natural gas

File **651**
Pages 12
Charts 3
Updated 9/21/2009

This report examines the ongoing struggle by natural gas distribution companies (LDCs) to extend their pipeline system within their franchise areas. LDCs face anonymous and neighborhood opposition believed to be organized by LPG distributors. In relation to public policy, the report notes the lack of public education at the local level related to matters of energy policy, such as the advantages of natural gas compared to LPG.

27

FRI, OCT 10

Pemex's uncertain future--David Shields

File **657**
Pages 6
Charts 1

This report reviews the book in Spanish by David Shields, *Pemex, un futuro incierto* (2003) and comments on the choices ahead for Pemex and Mexico in the oil sector.

28

WED, OCT 29

Reform proposals in the hydrocarbon-to-power value chain

File **656**
Pages 5
Charts 2
Updated 11/3/2003

This report analyzes two legislative proposals which would have the effect to strengthen Mexico's electric power infrastructure and generation capacity. A PRI proposal submitted on Aug. 27, 2003 by Deputy Jorge Chávez Presa contemplates a constitutional change to permit private investment in nonassociated gas fields to guarantee an adequate supply for power generation. A second proposal, announced Oct. 8, 2003 by PRD Sen. Demetrio Sodi, would have Pemex Refining responsible for building 2-4 Gw of additional cogeneration capacity—enough to last to 2010?

29

ANNUAL CATALOG

2003

FRI, NOV 21

The logic and politics of cogeneration in Mexico

File **663**
Pages 13
Charts 2
Updated 12/6/2003

This report reviews the history and politics of cogeneration in Mexico, focusing on the media and legislative attention given to this topic in October 2003. Table 1 of the report is a chronology of events associated with cogeneration that includes hyperlinks to the original documents. Fig. 1 is the table of contents of the hearing of the Senate Energy Commission on Oct. 7, 2003.

[30](#)

WED, NOV 26

Policy dialogue with Mexican senators

File **662**
Pages 12
Charts 3

This report describes the challenges facing any international analyst or company representative who might have the occasion to enter into a discussion of energy policy with senior Mexican political figures. One of the challenges is the proper measurement of the state of U.S.-Mexico relations; another challenge is finding a suitable topic and a style of presentation that fits within the scope of current debates over energy policy.

[31](#)

TUE, DEC 2

Fox administration at midterm: Performance and criticism

File **650**
Pages 14
Charts 2
Updated 12/8/2003

This report assesses the situation of the Fox administration at the midpoint of its term, taking into account the unexpected challenges associated with the global recession and the difficult relationship with the United States. Special attention is given to the events of the third anniversary of his presidency, including the megamarcha of Nov. 27, 2003.

[32](#)

TUE, DEC 30

Pemex's offshore platform program, 2003-07

File **659**
Pages 6
Charts 6

This report provides an overview of Pemex's ambitious offshore platform program for the second half of the Fox administration. Table 1 provides a breakdown of planned investments in platforms and pipelines, by Pemex region. Tables 2-4 give a 10-year outlook for Ku-Maloob-Zaap. Table 5 provides a preliminary list of proposed platforms in all regions.

[33](#)