

MEXICO'S ENERGY SECTOR: COMMERCIAL & POLICY OUTLOOK

1996

November

MON, NOV 25, 96 Gas LDC Franchise in Saltillo

File 156
Pages
Charts

Comments on CRE press release regarding the gas distribution franchise in Coahuila.

SUN, NOV 24, 96 Foreseeing upstream policy in Mexico, 1996-2002

File 116
Pages
Charts
Updated 7/17/2002

Long arrow of energy policy points upstream. Commentary on MEI graph of "From lightbulb to reservoir in Mexico".

MON, NOV 18, 96 Mexico's Basins Could Provide Niches for Various Sized Firms

File 111896
Pages 4
Charts 3

This article, co-authored by George Baker and petroleum geologist James W. Wilson, examines each major Mexican petroleum basin from the angle of the size of the operating company that could optimally develop a given field. The article points out the areas where Pemex's overhead costs and skill-sets are ill-suited as an operator; and identifies fields where, by contrast, the overhead and skill-sets of third-parties are indicated. The logic of this analysis underlies the MSC Program of 2002, the EP Program of 2011, and the upstream reform of 2014. *Oil & Gas Journal*, Nov. 18, 1996

October

WED, OCT 23, 96 Chihuahua LDC bidding announcement

File 151
Pages
Charts

*Maria

WED, OCT 16, 96 Mexican Government's new petrochemical strategy

File 150
Pages
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*Maria

TUE, OCT 15, 96 Outlook on Mexican natural gas import tariff

File 149
Pages
Charts

*Maria

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MON, OCT 14, 96 **B&A to move to Houston effective 10/1/96**

File **148** *Maria
Pages
Charts

FRI, OCT 11, 96 **CRE self-supply pipeline permit in Queretaro**

File **147** *maria
Pages
Charts

TUE, OCT 1, 96 **PRI vote against Pemex privatization**

File **145** *Maria
Pages
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File **146** *Maria
Pages
Charts

September

TUE, SEP 24, 96 **IEA study of gas regulations in Mexico**

File **144** *Maria
Pages
Charts

MON, SEP 9, 96 **Pemex awards E&P contract to Norwegian firm**

File **142** *Maria
Pages
Charts

File **143** *Maria
Pages
Charts

TUE, SEP 3, 96 **Pemex July statistical report**

File **140** *Maria
Pages
Charts

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File **141** Mexico's efforts to modernize infrastructure and public services have not produced corresponding improvements in the legal system. "Wild west" conditions exist in Mexico's courts of law. Social violence is still very much a part of Mexican politics. A new guerrilla group has emerged in recent weeks, launching attacks on police and military units in several states. The rebels are not considered a threat to the Mexican government, but their attacks are likely to dampen a recent surge in investor enthusiasm about the country's economic recovery.

August

MON, AUG 26, 96 **Conoco proposal in the press again**

File **138** *Maria
Pages
Charts

File **139** *Maria
Pages
Charts

WED, AUG 14, 96 **Press reports: Pemex and CRE to sell natural gas distributors**

File **136** *Maria
Pages
Charts

File **137** In general, there is no responsible public discussion or debate about energy policy issues in Mexico. Most parties of the discussion use public forums to pressure Pemex, the CFE and the Government, often by recourse to sensationalism and yellow journalism.
Pages 1
Charts 0

TUE, AUG 13, 96 **Announcement of winner in Mexicali natural gas distribution bidding**

File **135** *Maria
Pages
Charts

FRI, AUG 9, 96 **Cactus explosion: background analysis**

File **133** *maria - This is a duplicate of 131
Pages
Charts

File **134** *maria
Pages
Charts

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THU, AUG 8, 96

Cactus explosion: background analysis

File 131
Pages 2
Charts 1

An interview on Aug. 3 with Hugh Harleston, Jr., a former Pemex contractor, now retired in Tijuana, led to a new perspective on the Cactus explosion of July 26: The contractor visited the refrigeration units at the Cactus plant in December 1994, and, at the time, was representing a systems automation company.

File 132
Pages
Charts

*Maria

FRI, AUG 2, 96

Pemex petroleum indicators May 1996

File 130
Pages
Charts

*MARIA

July

WED, JUL 31, 96

Pemex production statistics for June 1996

File 129
Pages 2
Charts 3

Pemex's production, price and trade statistics for June. In place of our customary analysis of trends, we highlight the projected impact of the July 26 explosion of the 1.0 Bcfd Cactus gas processing plant.

TUE, JUL 30, 96

Explosion in Cactus gas processing plant

File 127
Pages 2
Charts 1

Immediate implications of major explosions in the gas processing plant at Cactus, in the SE Reforma fields. According to Adrián Lajous at Pemex, 1 Bcfd of gas processing capacity will be taken off line for at least 18 months.

File 128
Pages
Charts

In a meeting with a top level official in the Energy Ministry on July 23, several topics were discussed, including the present situation in the petrochemical privatization and the outlook for upstream policy in the Zedillo administration. Also discussed was the status of the controversial 7% duty on natural gas imports from the United States (See attached report and enclosures). [Publisher's note of 10/31/12: MEI reports were sent by regular mail during this period. We shall look for the paper files and scan them.]

TUE, JUL 23, 96

Crystal Ball in Mexico: Home-Office communications

File 124
Pages
Charts

*maria

File 125
Pages 1
Charts 0

On December 28, 1994, the Mexican government issued a decree creating the Secretariat of Environment, Natural Resources and Fishery (Semarnap). The new agency is responsible for Mexico's environmental protection, and is similar to the U.S. Environmental Protection Agency. With the creation of Semarnap, Sedesol is no longer responsible for environmental affairs.

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File 126 *Maria
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Charts

WED, JUL 3, 96 **Analysis of producer efficiencies**

File 123 *Maria
Pages
Charts

MON, JUL 1, 96 **Pemex statistics for May 1996**

File 122 *Maria
Pages
Charts

June

THU, JUN 20, 96 **Analysis by George Grayson**

File 121 *Maria
Pages
Charts

WED, JUN 12, 96 **Meeting with Ingenieros Pemex--Constitucion 1917**

File 120 *Maria
Pages
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TUE, JUN 11, 96 **David Shields's paper at UCLA May 28, 1996**

File 117 *Maria
Pages
Charts

TUE, JUN 4, 96 **Logical role of private sector in hydrocarbon production**

File 119 *Maria
Pages
Charts

MON, JUN 3, 96 **London address of Jorge Eduardo Navarette**

File 118 *Maria
Pages
Charts

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May

FRI, MAY 24, 96 Petrochemical privatization policy--revised paper Rev 7.3

File 115 *Maria
Pages
Charts

THU, MAY 23, 96 The "Dutch Disease" in Mexican Petrochemicals

File 05231996 This article, which was written by George Baker in collaboration with Mexico City consultant Albert Antebi, notes the political agitation related to the government's attempt to privatize Pemex's petrochemical plants in the mid-nineties. The term "Dutch Disease" is here used to refer to the collateral effects associated with bursting of an economic bubble.
Pages 17
Charts 4

MON, MAY 20, 96 Confirmation of new Pemex Gas Director

File 114 *Maria
Pages
Charts

WED, MAY 15, 96 Pemex offshore oil and gas production

File 109 *Maria
Pages
Charts

File 112 The Mexican Government operates as a family-run business, according to a WSJ article of May 16, 1996. Multi-generational families have parents and juniors running in and out of government to the family-run "grupos" (the Mexican term for conglomerate).
Pages 1
Charts 0

File 113 *Maria
Pages
Charts

TUE, MAY 14, 96 Continuing uncertainty about Samalayuca

File 110 Financing for the Samalayuca continues to struggle. The Zedillo government was initially going to put its eggs in two baskets: one, that of privatizing Pemex's petrochemical plants, the other in IPPs or electric power projects of any sort. Since mid-March, however, the government has been retreating on the privatization of Pemex's plants, leaving the electric sector as the targeted credit-worthy sector by default.
Pages 1
Charts 0

File 111 *Maria
Pages
Charts

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THU, MAY 9, 96

Pemex March production and sales statistics

File **108**

*Maria

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Charts

THU, MAY 2, 96

Pemex capital expenditures by corporate group

File **106**

*Maria

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Charts

File **107**

*Maria

Pages

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April

MON, APR 15, 96

February

File **105**

*Maria

Pages

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THU, APR 4, 96

Analysis of Government Waffling

File **104**

*Maria

Pages 1

Charts 0

March

FRI, MAR 29, 96

Pedro Haas resignation from Pemex

File **103**

*Maria

Pages

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THU, MAR 21, 96

58th Anniversary of the expropriation of the oil industry

File **102**

*Maria

Pages

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MON, MAR 18, 96

January

File **101**
Pages
Charts

*Maria

THU, MAR 7, 96

Yellow journalism about petrochemical privatization

File **100**
Pages
Charts

*Maria

SAT, MAR 2, 96

Energy plan 1996-2000--summary in English

File **99**
Pages
Charts

*Maria

FRI, MAR 1, 96

Areas for investment in gas transmission and distribution

File **98**
Pages **1**
Charts **0**

The Salinas Government completed a set of air quality guidelines that would take effect on January 1, 1998, and which, in effect, would require a massive shifting to natural gas within selected urban and industrial areas. To our knowledge, no one has tried to quantify, either as a whole or by region, the absolute volumes of natural gas that would be required to comply with the new air quality standards. Attached is a list of the cities and industrial areas that are identified as Critical Zones in the Air Quality Act (published in the Mexican Federal Register on December 2, 1994, two days after President Zedillo was inaugurated).

February

FRI, FEB 23, 96

Press report criticizing Pemex operations in Tabasco

File **96**
Pages
Charts

Press report

File **97**
Pages
Charts

*Maria

THU, FEB 22, 96

SE energy balance

File **92**
Pages
Charts

*Maria

File **93**
Pages
Charts

*Maria

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File **94** Comments on address by Pemex CEO Adrián Lajous on occasion of announcement of energy plan for Mexico.
Pages
Charts

File **95** *Maria
Pages
Charts

TUE, FEB 20, 96 **Analysis of fuel sources and sales expressed in MMcfd (Data Missing)**

File **91** *Maria
Pages
Charts

MON, FEB 19, 96 **Two scenarios for energy policy (Data missing)**

File **90** *Maria
Pages 1
Charts 2

SAT, FEB 17, 96 **Environmental protests in Tabasco (Data missing)**

File **89** *Maria
Pages
Charts

THU, FEB 15, 96 **Personal safety measures in Mexico**

File **87** For the middle and upper classes of Mexico City, daily life now includes exposure to the risk of armed robbery, assault and abduction. For most persons of this sector of society (both Mexican and foreign residents), incidents of this kind have happened, if not to them personally, then to persons in their family, social or professional circles. The business traveler to Mexico also needs to be aware of this danger and to take general and special precautions.
Pages 1
Charts 0
Updated 7/7/2004

File **88** *Maria
Pages
Charts

TUE, FEB 13, 96 **Policy role of Energy Minister in Mexico**

File **83** *Maria
Pages
Charts

File **84** *Maria
Pages
Charts

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File **85** *Maria
Pages
Charts

File **86** *Maria
Pages
Charts

January

MON, JAN 22, 96 Appointment of new energy minister

File **81** *Maria
Pages
Charts

File **82** *Maria
Pages
Charts

FRI, JAN 19, 96 Lajous's address to a meeting of the Interstate Nat. Gas Ass. of Amer.

File **80** *Maria
Pages
Charts

THU, JAN 18, 96 Nova proposal for the Burgos Basin (Updated)

File **78**
Pages 2
Charts 0

Insights on the NOVA Proposal to the Zedillo Government regarding the project to develop the natural gas reserves of the Burgos Basin. The project to develop the natural gas reserves of the Burgos Basin by a consortium of U.S. and Canadian companies, which was reported on in the WSJ on Jan. 9 (and in the Houston Chronicle on Jan. 10) turns out to have been a project initiated by NOVA Corporation. The basic proposal, which was 100% Canadian, was submitted to Pemex, the Energy Ministry and the Presidency of Mexico in January of 1995.

File **79** *Maria
Pages
Charts

MON, JAN 15, 96 November Pemex statistics

File **76** *Maria
Pages
Charts

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File **77**
Pages 3
Charts 0

This report comments on the innovative proposal by Canadian and U.S. oil companies in 1995 to develop the Burgos Basin under contract with Pemex. The source journalist says that Concoco itself believes that Pemex leaked the story of the proposal. The memo provides enough data points to be able to estimate other parameters of the project, based on the model of a Canadian "cost-service" contract. The proposal was leaked in the WSJ on January 9, 1996, and reprinted in the Houston Chronicle on January 10th. (Neither article is available online. -- Ed.)