



## MEI report titles related to Natural Gas Markets and Policy

*For natural gas, we have issued 135 reports since 1995*

For more than 20 years, Mexico has not resolved the role of natural gas in energy, environment and urban policy. In 1994, Mexico imposed a 10% tariff on natural gas imports, a measure slyly intended to strengthen the grip of Pemex (PGPB) on pipeline transportation and the industrial market. PGPB's control of gas imports meant that there was no market-based way to price natural gas. CRE chose a netback pricing scheme using U.S. price indexes as a reference.

Progress toward a market-based regulation has been slow, but in Report 805, we are cautiously optimistic: CRE's Gas Release Program requires Pemex to reduce its customer portfolio by 70%. If that happens, new doors will open for gas resellers, and a competitive market will emerge.

Year	Topic	File #	Pages	Chart
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### 2016

Mar 04, 16	<b>Mexico's Midstream and Downstream Gas Outlook: Hopeful</b>	805	12	6
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This report examines the outlook for Mexico's natural gas market in its upstream, midstream and downstream segments. All three market segments are ready for an upgrade: the upstream by allowing a CNH contractor unregulated pricing; the midstream by an implementation of the Energy Regulatory Commission's Gas Release Program that requires Pemex to down-size its commercial gas portfolio by 70%; and the downstream by the new volume and T&C that could be offered by new-to-market gas marketers. Market actors all along the gas value chain should see new opportunities--and new risks.

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Year	Topic	File #	Pages	Chart
<b>2015</b>				
Nov 17, 15	<b>Pemex Response to Natural Gas Regulations</b> This report republishes, with retrospective comments, our earlier report of Nov. 17, 1995. That report was about the roll-out of the natural gas law and regulations on Nov. 8, 1995, that began with presentations at Los Pinos that was attended by some 400 guests. Afterwards, there was a Q&A at the Hotel Nikko, followed by a luncheon hosted by Pemex. Pemex Director General Adrián Lajous made it clear that Pemex would not support the new natural gas market design that was implicit in the law and regulations. Thus, 20 years later, there is no natural gas pipeline that competes with those of Pemex.	1000081	3	0
Mar 02, 15	<b>Mexico's Energy Reform: A Sobriety Test (Oil &amp; Gas Journal)</b> This article examines the positive and cautionary signs in the upstream reform in Mexico. It is observed that much of the topic is still inside baseball, meaning that the back-office story is not widely understood. Published in <i>Oil &amp; Gas Journal</i> , March 2, 2015, pp. 34-37.	030215	3	1
<b>2014</b>				
Aug 01, 14	<b>"Pipeline Fever in Mexico" (Pipeline and Gas Journal, August 2014)</b> This article, by George Baker, discusses the stepped-up efforts by Pemex and CFE to launch pipeline projects prior to the legislative changes that would be brought about by the Energy Reform of 2014. In discussing the projects of Pemex and CFE, the author asks, What's the rush? <a href="http://www.pipelineandgasjournal.com/pipeline-fever-mexico">http://www.pipelineandgasjournal.com/pipeline-fever-mexico</a>	080114	3	2
Jul 14, 14	<b>Mexican Oil &amp; Gas Summit: The Soft Authoritarianism of the Mexican Podium</b> This report offers a critique of the industry conference held in Mexico City on July 1, 2014. The event included, as speakers, Sen. David Penchyna, chairman of the Senate Energy Committee, as well as other government officials from SENER and CNH. Most of the speakers and panelists were from vendors of oilfield products and services. Absent from the program were representatives of international oil companies and experts on fiscal systems, thus preventing a discussion of critical issues. The career profiles of several of the speakers are described.	1000034	7	2



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Year	Topic	File #	Pages	Chart
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Jun 26, 14	<b>Mexico's New Oil and Gas Regime: Body language is as important as fine print</b>	100193	10	0
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This report is based on a reading of the articles of the two legislative proposals to govern the administration and fiscal terms of the oil and gas industry in Mexico that were submitted to the congress on April 29, 2014. The report benefitted from discussions from industry and legal sources about the implications for IOC investment in the upstream. Our conclusion from what we have read and heard is that the proposed fiscal system is short of what was expected, as it has too many constraints that are ideologically driven. The report identifies issues that can be addressed to polish the invitation to IOCs.

### 2013

Dec 17, 13	<b>Bold measures in Energy Reform for Natural Gas: Bullet Points</b>	1000015	1	1
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The text of the 2013 energy reform gave scant attention to natural gas, despite the central role that natural gas is to play in electric power generation, manufacturing and the upgrading of urban life styles to residential pipeline service. Focus needs to be on the full natural gas value chain, not only on the policy and commercial mechanics of increasing gas production. With this perspective in mind, we identify six government agencies whose responsibilities touch on the gas value chain; and we suggest action items for each agency. We also suggest strategic considerations for MSC operators in Mexico.

Sep 11, 13	<b>Lifting Mexico's Oil &amp; Gas Potential: Presentation at the BN Americas O&amp;G Summit</b>	09/11/13	17	4
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As all of the invited government and Pemex speakers from Mexico had declined to participate (following instructions), the conference organizers had to improvise for the Mexico panel. George Baker was one of three substitute speakers He observed that a Pemex 2.0 is needed as a state majority-owned NOC with the mandate to carry out JVs in Mexico and abroad. The slides are posted on Energia.com.

<http://www.energia.com/wp-content/uploads/2013/09/G-Baker-Lifting-Mexicos-oil-and-gas-potential.pdf>

### 2011

Aug 25, 11	<b>Shale Gas in Mexico: Ready, Aim-Estimate</b>	100097	6	3
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This report reviews the seminar on shale gas in Mexico that was held in Houston on Aug. 23, 2011, at which Dr. Luis Ramos gave the first public presentation by Pemex on this topic. Pemex estimates that in the aggregate there are over 600 Tcf of recoverable natural gas in shale formations. The report also takes note of the study by the Baker Institute at Rice University which provides cost estimates for several shale formations.



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Year	Topic	File #	Pages	Chart
Jun 13, 11	<p><b>Pemex's Oil &amp; Gas Statistics: A Critique</b></p> <p>Pemex routinely publishes production and reserve statistics for the government and the general public, but these data are sterilized to remove most of their business or policy value. One issue is the legal (and statistical) fiction that Pemex is the sole operator in Mexico; hence, the gas output of operators under the MSCs is not reported to the public separately. This issue will become larger with the new Incentive Contracts. Tables in the report convert annual and monthly data to index values. Table 1 covers 2004 (Pemex's peak year) and 2010, and Table 2 covers monthly data for 2010 and 2011.</p>	100091	6	4
Apr 28, 11	<p><b>Outlook for Natural Gas Pipeline Capacity: Who regulates the Pemex-CFE duopoly?</b></p> <p>Mexican power and gas customers are becoming increasingly vulnerable to brown-outs and supply shortages that are both attributable to the lack of available capacity in Mexico's two natural gas pipeline systems: those of Pemex and CFE. Immediate public policy action is needed to integrate the two existing systems and to incentivize the construction of new pipeline capacity.</p>	100085	5	0
Apr 25, 11	<p><b>Outlook for Mexican Oil and Gas: Policy, Commerce and Corporate Governance</b></p> <p>This overview of the evolution of oil policy in Mexico was presented at the New York Energy Forum on April 25, 2011. It comments on the cultural and political underpinnings of energy policy in Mexico. The Energy Forum was a sponsor of the Mexican government's roadshow 3 1/2 years later when many of the points of criticism had been addressed by the 2014 Reform: <a href="https://www.nyenergyforum.org/resources/documents/G_Baker_NY_Energy_Forum_Outlook_for_Mexican_Oil_and_Gas[1].pdf">https://www.nyenergyforum.org/resources/documents/G_Baker_NY_Energy_Forum_Outlook_for_Mexican_Oil_and_Gas[1].pdf</a></p>	1042511	18	1
Jan 11, 11	<p><b>Recruitment for Top Government Jobs in Mexico: Conversations with Dr. Dagobert Brito, Architect of Netback Gas Pricing</b></p> <p>This market note summarizes conversations with Dr. Bob Brito of Rice University about the recruitment process in Mexico for top jobs in government. In Dr. Brito's view, the Mexican system is as efficient as that of France. The "Brito Profile" for success in the public sector is a) proficiency in English and b) a graduate degree from a prestigious university abroad. The report extends this analysis to include other factors that bear on senior government appointments, and notes how the PAN have changed the weights given to these variables.</p>	100075	9	1



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<b>2010</b>				
Aug 25, 10	<b>Outlook for Natural Gas Storage in Mexico</b> This market note briefly surveys the unmet expectations related to natural gas storage that have been experienced by policymakers and prospective investors in the fifteen years since this industrial activity was opened to private investment as part of the natural gas legislation of the mid-1990s. The project launched in 2005 between CYDSA and SaITec International is given attention.	100054	2	3
Mar 09, 10	<b>Educating the press regarding Mexican oil and gas</b> This report examines the themes that circulate in stories in the Mexican and international press in March, Mexico's "Oil Month." The themes of a story published in <i>The New York Times</i> of March 9, 2010, is taken as an example of how the traditional oil narrative gets replayed. The press fails to report on the steps taken to close the gaps between Pemex and global practices.	100031	1	0
<b>2009</b>				
Jan 16, 09	<b>Outlook for a Natural Gas Market in Mexico: Impediments and proposals</b> This report identifies factors in play that, together, have resulted in the absence of an open natural gas market in Mexico. These impediments are grouped into eight categories (see outline), and, for each, there is an explanation of the nature of the problem as well as suggestions for policy or institutional corrections.	744	17	4
<b>2006</b>				
Nov 21, 06	<b>Calderon's first energy crisis: Natural gas pricing</b> This report predicts that there will be a crisis in public policy over natural gas pricing in the first 100 days of the Calderón administration. The report examines the often-voiced complaints of Mexican residential and industrial consumers that natural gas prices in Mexico are too high. The analysis supports this conclusion, but for reasons not commonly heard in Mexico. The report offers an analysis of the steps needed to lower prices in the short- and medium-terms. It also identifies ideas that are not deemed workable in Mexico.	688	12	1
Aug 24, 06	<b>Natural Gas as a Factor of Regional Development</b> A PowerPoint presentation given by George Baker as a guest lecturer at the business school of the University of Guadalajara on Aug. 24, 2006. The paper argued that the Houston price of natural gas included a "social wrapping" that was not included in the CRE calculation of the Mexican price. The paper also argued the the fully burdend cost of LPG service is much higher than the fully burdened cost of natural gas. The audience was upwards of 50 people, including LPG representatives (in the front row).	082406	16	0



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Year	Topic	File #	Pages	Chart
<b>2005</b>				
Dec 01, 05	<b>El monopolio y el precio del gas</b>	120105	2	0
	<p>This report examines alternative views about the pricing of natural gas in Mexico, including one by the Natural Gas Association (AMGN) that urges a cost-based, pricing system.</p> <p>The report was published in Spanish in ENERGIA A DEBATE (December 2005). <a href="http://www.energiaadebate.com/Articulos/dic_2005/george_baker.htm">http://www.energiaadebate.com/Articulos/dic_2005/george_baker.htm</a></p>			
Jun 23, 05	<b>Indirect and social costs of LPG and natural gas service</b>	694	16	12
	<p>This report inquires into the total cost of service of LPG and natural gas for residential and commercial customers in Mexico, taking into account costs and risks for the customers and communities beyond those of the regulated prices for each product. Example: consumer fraud in LPG cylinder service has been estimated at US\$500 million annually. This report identifies components of costs and risk for both LPG and natural gas service. Translated titles from the Mexican press provide a glimpse into developments in the Fox administration.</p>			
Feb 16, 05	<b>Oil and gas pipeline safety crisis in Mexico</b>	686	12	12
	<p>This report examines the deteriorating public confidence in pipeline safety in Mexico in the oil and gas industry. Institutional weaknesses are made visible by industrial accidents like oil spills, pipeline ruptures, well blow-outs and explosions at facilities. The oil spill in Veracruz on Dec. 22, 2004, is taken as a case in point. The report discusses safety programs in Pemex as well as on regional and national press reporting. The accident frequency points to challenges within Pemex and the federal and state governments.</p>			
<b>2004</b>				
Dec 15, 04	<b>Outlook for world oil and gas markets: Lessons for Mexico</b>	684	9	0
	<p>This report draws on presentations and discussions at the conference held in Houston on Dec. 9, 2004 sponsored by the local chapter of the IAEE. The speakers and moderators were from the public and private sectors, including the University of Houston, the Oxford Institute of Energy Studies and the Reserve Bank of Dallas. Speakers concentrated on oil and gas prices and LNG markets in Europe, North America and Asia. Lessons and implications for Mexico's energy sector are noted.</p>			
Oct 22, 04	<b>Natural gas pricing and procurement controversies in Mexico, 1993-2004</b>	678	8	2
	<p>This report surveys the landscape of proposals and practices for natural gas pricing, storage and transportation since NAFTA came into effect Jan. 1, 1994. The successes and shortcomings of public and private tenders and direct negotiations are examined in relation to projects in gas, power and refinery upgrades. The report retraces some of the early history of the 1990s as background for developments during the Fox administration.</p>			



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Mar 31, 04	<b>Mexican energy in 2003. Year of natural gas</b> <p>This report highlights major developments in Mexico's energy sector in 2003, making special note of advances and setbacks in natural gas, power and energy policy. The report takes note of personnel changes during the year, and contains tables that document the Metrogas pipeline safety controversy in Mexico City and the CRE's five-year review of natural gas distribution permits.</p>	667	13	3
<b>2003</b>				
Sep 30, 03	<b>Gas distribution in Mexico: LPG vs. natural gas</b> <p>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.</p>	651	12	3
Aug 19, 03	<b>China as test case for basket pricing of natural gas</b> <p>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.</p>	648	8	3
Jul 25, 03	<b>Natural gas pricing crisis in Mexico</b> <p>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.</p>	647	12	1
Jan 24, 03	<b>A guide to data publications on Mexico's oil and gas industry</b> <p>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.</p>	624	6	0



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Year	Topic	File #	Pages	Chart
<b>2002</b>				
Dec 29, 02	<b>Natural gas price fixing in Mexico</b> In the context of a larger discussion of gas pricing, this report describes the CRE's repairs to the formula governing natural gas prices in Mexico. The need arose when in November 2002 the U.S. price index for gas that had been used to benchmark Mexican prices was not published, owing to suspicions that U.S. price data had been fraudulently manipulated by traders.	619	9	1
Dec 17, 02	<b>Cross-border gas pipelines: regulators, markets and policies</b> This report builds on discussions with the Railroad Commission of Texas of topics such as its collaboration with Mexico's CRE. The Commission anticipates expanded cross-border gas trade and infrastructure and foresees Mexico as a future exporter of gas.	617	7	0
Jun 26, 02	<b>Upstream gas conference: Concepts and body language</b> This report provides an overview of the Mexican gas conference held in Mexico City June 20-21, 2002. Emphasis is given to the basic concepts presented by Pemex and to the coded messages contained in a number of the presentations.	586	5	0
Apr 12, 02	<b>Drivers of natural gas demand in Mexico, 2001-2010</b> This report analyzes three drivers of natural gas demand in Mexico: global economy, the internal market and a mix of both effects. This report presents scenarios of natural gas demand, by economic driver, for the period 2001-2010.	580	6	9
Feb 28, 02	<b>Sturm und Drang in Mexico's natural gas markets</b> This report questions the need for new natural gas supplies in Mexico as the U.S. and Mexican economies continue to show signs of weakness. The report follows up on earlier analysis (MEI 529) that predicted lower gas demand in Mexico.	568	6	2
<b>2001</b>				
Dec 31, 01	<b>UNAM Seminar on Natural Gas</b> On Dec. 3, 2001 the Energy Studies Program of the National University in Mexico City (UNAM) organized a 3/4 day conference on upstream, midstream and downstream issues on natural gas. This report provide highlights of the presentations.	561	3	1
Oct 26, 01	<b>International investors in Mexico's gas and power markets</b> 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.	547	3	11
Aug 31, 01	<b>Modeling natural gas demand in an economic slow-down</b> 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.	529	4	5



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Aug 08, 01	<b>Opportunity costs of a closed natural gas market</b> Comments on the economic and political costs to Mexico of having a closed natural gas transportation market in Northern Mexico.	530	4	0
Jun 28, 01	<b>“Green Economist” Overture: gas market forecasting in Mexico</b> 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 meetâ€”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.	516	4	0
Apr 18, 01	<b>Outlook for natural gas markets in Mexico</b> Review of Pemex statistics and Government forecasts relating to natural gas supply and demand. Examines Pemex's dominant role in the natural gas market in 1999-2000.	496	3	0
Apr 17, 01	<b>Frustrated gas market opening under Zedillo</b> Review of the events of Nov. 5, 1995 when President Zedillo's policy for the liberalization of the natural gas market was unveiled. Comments on Pemex's negative reaction.	494	3	0
Apr 16, 01	<b>Natural gas market outlook, 2000-2009</b> Survey of Pemex 's statistics for natural gas production and sales. Asks about the likelihood that Pemex will meet supply targets of Energy Ministry for 2009.	492	8	5
Feb 01, 01	<b>Questioning the “Mexico Price” for natural gas</b> 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.	476	2	0
Jan 12, 01	<b>Natural gas pricing crisis in Mexico</b> An appraisal of short- and long-range options to move Mexico's natural gas sector from a command economy to a market-based economy. The cover letter to Energy Minister Ernesto Martens is dated January 11, 2001, at the peak of the controversy in Mexico regarding natural gas pricing, which became the first policy crisis of the new Fox administration.	472	6	0
Jan 05, 01	<b>Energy policy dilemma: How to price natural gas in Mexico?</b> In December, 2004, a major controversy erupted between the Government and Monterrey industry over natural gas prices. This report reviews the reactions to Pemex's proposal to finance gas purchases over \$4/MMBTU.	471	12	0



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<b>2000</b>				
Dec 27, 00	<b>Crisis in natural gas pricing in Mexico</b> A review of the history and current developments related to the pricing of natural gas in Mexico. The history of the effort to link natural gas prices in Mexico to those of a benchmark in the United States is only partially known. One version is that the idea began with American companies, who, during the negotiations in 1991-92 that eventually led to NAFTA, argued that they wanted protection against an uncertain gas pricing policy of Pemex. In 1995, the CRE, headed by Héctor Olea, approached former mentors at Rice and asked for an economic analysis of natural gas pricing in Mexico.	467	3	0
Dec 14, 00	<b>CRE call for public comments on gas industry - scope and politics</b> Report of discussions in CRE regarding scope of call for public comments on natural gas industry. Discussions held with CRE commissioners during the period December 7-14 have highlighted the possibilities as well as the limits of the Commission's call for public comments on the natural gas industry in Mexico. The call for public comments initially was scheduled to expire December 1, but the deadline was extended to January 31 at the request of trade associations and other parties. (About a dozen comments were submitted by the initial deadline, including one by MEI.)	463	2	0
Dec 12, 00	<b>Midstream proposal to CRE to improve efficiency of natural gas industry</b> Document submitted to the CRE on November 30, 2000 in response to a call for public comments on the natural gas industry. Topics concern midstream gas issues of policy and pricing.	462	9	0
Aug 29, 00	<b>Monterrey gas markets: Consolidation vs. Competition</b> This report considers the request by Gas Natural México (GNM) to the Federal Competition Commission (CFC) to expand its market presence in Monterrey by acquiring full control of one of its local competitors, Compañía Mexicana de Gas (CMG). GNM recently acquired its seventh natural gas distribution company and is now looking to buy its eighth. Therefore, the decision by the CFC to approve or deny the merger will sharply affect the outlook for competitive markets and infrastructure investments in natural gas markets.	442	3	0
Aug 07, 00	<b>Calculating Pemex's natural gas transportation &amp; service charges</b> Analysis of structure of Pemex's gas distribution and transportation prices.	438	9	8
Aug 01, 00	<b>Natural gas pricing crisis (du jour) and future policy options</b> Monterrey industry protests to Government about high natural gas prices. CRE grants a 25% discount on benchmark for customers with hedging contracts.	436	1	0



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Jun 29, 00	<p><b>Natural gas distribution franchises, 1996-2000</b></p> <p>Discussion of the history of the CRE's awards of gas distribution franchises and database output on the awards. The CRE's award of the Guadalajara natural gas franchise on June 21 to Tractebel was the last of the of the Zedillo Administration. Tractebel's price cap offer (P<sub>o</sub>) of US\$0.25/Gcal narrowly beat that of Gaz de France's of \$0.28/Gcal.</p>	429	5	1
Jun 14, 00	<p><b>Pemex's Strategic Gas Program (PEG). Attached article re Macuspana Basin.</b></p> <p>Article by Fabio Barbosa on Pemex's strategic gas program, translated by James L. Wilson.</p>	423	9	6
Jun 13, 00	<p><b>Northern Baja Gas Pipeline Consortium</b></p> <p>Discussion of announcement by Sempra Energy to build a natural gas pipeline across northern Baja California, thereby carrying out a physical bypass of its own pipelines system in Southern California.</p>	426	1	0
Jun 08, 00	<p><b>Mexican gasoline price trends and issues, 1997-99. Analysis of rack-to-pump spread.</b></p> <p>Analysis of recent trends in gasoline prices in Mexico, noting movements relative to producer price index.</p>	424	6	
May 18, 00	<p><b>Pemex natural gas pricing, by marketing region</b></p> <p>This report examines the logic of traditional bundled prices, using original Pemex data of June 1998 for illustration. There are some two dozen pricing regions or sectors, a few of which, like Monterrey, have subsectors (Monterrey and Monclova, in this instance). The report includes database output of bundled prices of natural gas in Pemex's principal markets, noting differences for each class of service (e.g., firm annual, firm monthly, interruptible).</p>	418	15	3
May 01, 00	<p><b>Oil and gas output in 1999, by basin and selected fields</b></p> <p>Database output of Pemex's data for some 30 fields for oil and gas production in 1999.</p>	417	1	0
Mar 28, 00	<p><b>Pemex Gas's natural gas pipeline system map set for customers</b></p> <p>Pemex's SICORI is preparing maps with Pemex Gas infrastructure, including pipelines.</p>	407	2	1
Feb 02, 00	<p><b>Coalbed Methane gas (CBM) &lt;Indexed also in Upstream&gt;</b></p> <p>Discussion of status of coalbed methane as investment opportunity for private investment.</p>	395	1	0



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<b>1999</b>				
Dec 20, 99	<b>Pemex natural gas production, by basin and reported field, 1989-98</b> 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.	385	9	2
Nov 14, 99	<b>Outlook for natural gas storage</b> 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.	378	1	0
Nov 13, 99	<b>Gas "self-supply" associations as LDC competitors</b> 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.	379	1	0
Nov 12, 99	<b>CRE vs. Pemex in future gas sales</b> 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?	377	1	0
Jul 29, 99	<b>MEI inventory of Pemex oil and gas fields: Northern fields</b> 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..	357	14	1
Jul 02, 99	<b>Natural gas import duty -- Reverse engines</b> 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.	352	1	0



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May 26, 99	<b>Mexican Government to lift gas import duty July 1</b> Analysis of the effects of the agreement reached to eliminate the import duty on natural gas by July 1, 1999.	342	1	0
Apr 02, 99	<b>Natural gas price behavior</b> Discussion of the behavior of natural gas prices in Mexico and analysis of key drivers.	330	4	2
Mar 31, 99	<b>New Pemex oil and gas reserve estimates</b> Report on the recently issued volumes on Pemex's reserves.	329	4	7
Feb 28, 99	<b>AMGN presentation Natural Gas Market in Houston</b> Report on the presentation by the president of the Mexican Natural Gas Association (AMGN) on January 25, 1999 in Houston.	323	1	0
Feb 05, 99	<b>PEMEX Gas investment program</b> Reports Pemex Gas presentation at the annual Energy and Industry congress held January 15-16, 1999 in Villahermosa, Tabasco.	316	1	0
Jan 30, 99	<b>Has the CRE admitted defeat in natural gas marketing?</b> Discussion of the CRE's view of regulatory policy in natural gas markets in Mexico, as presented at the Economist Energy Summit in Houston.	312	1	0
Jan 12, 99	<b>Outlook for Open Access in natural gas markets</b> Some thoughts about the present and future of Open Access in Mexico.	311	1	0
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<b>1998</b>				
Nov 25, 98	<b>PEMEX gasoline price increases</b> Gasoline price increases and energy products pricing and taxation policy in Mexico.	303	2	0
May 17, 98	<b>Pemex Gas proposed General Terms &amp; Conditions</b> Analysis of the General Terms and Conditions proposed by Pemex Gas.	269	2	0
Apr 08, 98	<b>Negotiations to Eliminate Mexico's Natural Gas Duty</b> Negotiations to eliminate the duty on natural gas imports into Mexico. The Mexican Commerce Department (SECOFI) has made an offer to trade its natural gas import duty on natural gas in exchange for an elimination of the U.S. duty on PTA (purified terephthalic acid), an input into the production of polyester and PET, used for making plastic bottles.	257	2	0
Mar 31, 98	<b>PEMEX gas balance, 1995-97</b> Discussion of Pemex natural gas utilization and balance reporting practices.	255	4	4



## MEI report titles related to Natural Gas Markets and Policy

Year	Topic	File #	Pages	Chart
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Mar 20, 98	<b>Natural gas outlook 1997-2006</b>	253	1	3
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Analysis of Energy Ministry's forecast for natural gas consumption for the 1997-2006 period. According to the SE, domestic consumption of NG is expected to grow by some 160%, from 2.6 Bcfd in 1997 to 6.7 Bcfd in 2006. More than half of that increase is explained by NG consumption in the electric power sector (Fig. 1). In turn, these expectations are supported by the programmed conversion of several CFE plants to NG and new public and private (IPP) capacity powered by gas in order to meet new air quality regulations.

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### 1995

Sep 09, 95	<b>LPG v. natural gas culture in Mexico City</b>	51	1	0
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Report of conversations with Jorge Rebolledo [senior], president of DIGANAMEX, the natural gas distributorship in Mexico City, about the absence of a natural gas culture in Mexico. The social cost of LPG and the current market leaders in the residential sector are also considered.