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FEATURED Q&A

What's the Outlook for Renewable Energy in 2026?



Latin America's production of zero- and low-carbon energy generally grew slower in 2025 than it did in 2024. // File Photo: Photo_and_Pixel via Adobe Stock.

Q Latin America experienced uneven growth in zero- and low-carbon energy deployment in 2025. Brazil saw its new solar energy capacity installations decrease compared to 2024, but its total was still the second-highest ever due to continued expansions in small-scale distributed generation; additionally, wind and solar energy now make up more than 40 percent of Chile's electrical grid. Meanwhile, multinational firms including Iberdrola and Enel divested from major renewable power projects in Mexico and Colombia, respectively, and elevated country risk hangs over the investment climates of Ecuador and Peru. What macroeconomic and political trends will drive investments in major wind and solar energy projects in Latin America in 2026? Which countries in the region are best situated to accelerate their deployment of low-carbon energy systems in the coming year? Which countries are likeliest to fall behind?

A Marina Pera, senior analyst at Control Risks in Mexico City: "Accelerating the energy transition in Latin America remains a major challenge, which is constrained by macroeconomic and political factors. Fiscal pressures, economic volatility and exchange-rate risks limit most countries' ability to attract large-scale investments. Investors also face infrastructure gaps, persistent corruption and weak political commitment. Outdated or incomplete regulatory frameworks for emerging segments, such as battery storage, offshore wind and hybrid generation, further restrict the region's potential to achieve meaningful progress toward a large-scale transition. Green project development will continue to vary across the region. Brazil is best positioned to attract investment—not only in solar and wind energy, but

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TOP NEWS

OIL & GAS

Trump Orders Blockade of Sanctioned Oil Tankers

U.S. President Donald Trump on Tuesday said he was ordering "a total and complete blockade" of sanctioned oil tankers heading into and out of Venezuela.

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OIL & GAS

PDVSA Suffers Cyberattack Amid U.S. Tensions

Venezuelan state-run oil firm PDVSA paused fuel deliveries this week after a cyberattack hit the firm's systems. Venezuela's government blamed the United States for the attack.

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POWER SECTOR

Puerto Rico Sues Private Utility Firm Luma

Puerto Rico on Dec. 11 filed a lawsuit against private power company Luma. Governor Jenniffer González-Colón said the company has provided poor service and has failed to resolve complaints.

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González-Colón // File Photo: U.S. House of Representatives.

OIL & GAS NEWS

Trump Orders Blockade of Sanctioned Tankers

U.S. President Donald Trump on Tuesday said he was ordering “a total and complete blockade” of sanctioned oil tankers headed to and departing from Venezuela. “Venezuela is completely surrounded by the largest Armada ever assembled in the History of South America. It will only get bigger, and the shock to them will be like nothing they have ever seen before,” Trump wrote on his Truth Social media platform. Trump added that the blockade would last until “they return to the United States of America all of the Oil, Land, and other Assets that they previously stole from us,” in an apparent reference to Venezuela’s past nationalizations of U.S.-linked assets in the South American country. The announcement came amid a massive U.S. military buildup in the Caribbean and a U.S. military campaign of destroying boats in the Caribbean and eastern Pacific that the Trump administration has said are transporting illegal drugs to the United States. The U.S. Navy has 11 ships, including the world’s largest aircraft carrier, and several amphibious assault ships in the region, the Associated Press reported. The ships carry a large number of fighter jets, helicopters and other aircraft. It was unclear from Trump’s post on Tuesday how many sanctioned oil tankers would be affected and how much the U.S. military would be involved in enforcing such a blockade, The Wall Street Journal reported. The announcement followed U.S. forces’ seizure last week of a tanker loaded with about more than one million barrels of oil in Venezuelan waters. Venezuela’s government criticized last week’s seizure of the oil tanker and Trump’s order for a blockade, The Wall Street Journal reported. “The president of the United States is trying in an absolutely irrational manner to impose a supposed military naval blockade on Venezuela to steal the riches of our homeland,” the South American country’s government said in a statement, the newspaper reported.

“Venezuela will never go back to being a colony of the empire, nor any other foreign power,” it added. Trump’s blockade order appeared to exempt Chevron, which has been exporting more than 100,000 barrels of crude oil and fuel per day since September under a renewed sanctions waiver license from the U.S. government, The Wall Street Journal reported. In a statement on Tuesday, Chevron spokesman Bill Turenne said the company’s operations in Venezuela are continuing “without disruption and in full compliance with laws and regulations applicable to its business, as well as the sanctions frameworks provided for by the U.S. government,” The Washington Post reported. [Editor’s note: See related [Q&A](#) in the Nov. 20 issue of the daily Latin America Advisor.]

Venezuela’s PDVSA Suffers Cyberattack Amid U.S. Tensions

Venezuelan state oil company PDVSA’s oil export data system was down for at least four days following a cyberattack that hit the firm on Saturday, Reuters reported. Four sources close to the matter told the wire service that all of PDVSA’s oil cargo deliveries remained suspended on Monday as the company worked to recover from the cyberattack. Cargo deliveries resumed on Wednesday, the wire service reported. PDVSA and Venezuela’s oil ministry each said on Monday that the attack was carried out by “foreign interests” working on behalf of the United States, Reuters reported. PDVSA staff were directed to refrain from using any company devices or networks amid the attack, sources at the firm told Bloomberg News on Monday. PDVSA has never suffered a cyberattack of this magnitude, the news service reported. The attack came three days after U.S. military personnel seized a sanctioned oil tanker that had recently departed from PDVSA’s José terminal. In October, U.S. President Donald Trump said that he had authorized the Central Intelligence Agency to take covert actions in Venezuela amid the U.S. military’s escalating campaign of airstrikes against alleged drug trafficking vessels in the

NEWS BRIEFS

Petrobras to Enter Brazil’s Solar Market

Brazilian state-run oil giant Petrobras has signed a partnership agreement with London-based developer Lightsource BP, marking Petrobras’ entry into Brazil’s solar energy sector, the firms announced on Tuesday. Petrobras is set to acquire 49.99 percent of Lightsource BP’s unit in Brazil, subject to regulatory approval. Lightsource BP, which is a subsidiary of British oil major BP, manages the 212-megawatt-capacity Milagres solar plant in Ceará state. The firm also has 1.5 gigawatt in new solar capacity from projects that are currently in advanced stages of development in Brazil.

Petrobras Reports No Change to Production As Strike Kicks Off

Petrobras’ production of crude oil and refined fuel products remained unchanged after more than half of its workers began a strike on Monday, the firm said in a statement, Reuters reported. Oil workers’ union FUP said Wednesday that many employees on offshore oil platforms in Brazil’s Campos basin were participating in the strike, the wire service reported. Negotiations on employee compensation plans remain ongoing between FUP and Petrobras.

Spain’s Acciona Sells Two Wind Farms in Mexico

Spanish energy developer Acciona Energia has agreed to sell two wind farms in Mexico’s Tamaulipas state to Mexico Infrastructure Partners, a Mexico City-based firm, in a deal totaling \$1 billion, Acciona said in a regulatory filing on Monday, Reuters reported. Acciona will transfer control of two operational wind farms, both of which are located near Reynosa along the U.S.-Mexico border, with 321 megawatts in total continuous power capacity. The transaction also includes a minority stake in four solar farms in the United States, Infobae reported.

Caribbean, Bloomberg News reported. There's no evidence connecting the tanker seizure and the cyberattack that affected PDVSA's systems, Reuters reported. The company, which has a monopoly on Venezuela's oil export infrastructure, sent more than 900,000 barrels of oil and fuel abroad per day last month, equal to approximately three tanker departures per week, according to data from Reuters. Venezuela's oil exports jumped by 3 percent between October and November.

POWER SECTOR NEWS

Enel Under Fire From Gov't After Blackouts in São Paulo Area

Strong winds and drought conditions in southeastern Brazil caused power outages that left more than two million people without electricity in the São Paulo metropolitan area last week, Bloomberg News reported. Italian utility firm Enel, whose Brazil subsidiary has more than seven million customers around São Paulo, said it had restored power to 99 percent of its customers by Sunday, Valor International reported. The outages, which began on Dec. 10 and left more than one million people without power for 24 hours, sparked a flurry of complaints from Brazilian government officials. On Monday, São Paulo state prosecutors filed a motion asking for ANEEL, Brazil's federal energy regulatory commission, to suspend any proceedings related to the ongoing renewal of Enel's concession in the São Paulo metropolitan region, Valor reported. Energy minister Alexandre Silveira then on Tuesday said that Brazil's government plans to ask ANEEL to begin the process of terminating Enel's existing contract in the São Paulo area, Reuters reported. Enel has faced scrutiny over power outages in Brazil's largest city in recent years, paying ANEEL at least 29 million reais (\$5.4 million) in fines between 2019 and 2024, according to Valor. ANEEL has not yet issued a subpoena for Enel, which would be necessary in order to begin the process of terminating

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also in biofuels, public transportation electrification and the carbon credit market. Chile, Colombia, Mexico and Peru will remain key destinations for green investments, while Central American and Caribbean nations such as Costa Rica and Jamaica are increasingly gaining appeal. These countries are gradually updating regulatory frameworks, expanding sectoral programs and allocating more funds for clean energy, which will help reduce risks, draw private capital and accelerate strategic projects in the coming years. In terms of projects, solar energy continues to stand out as the most promising source of power generation, and battery storage is also emerging as developers look beyond traditional renewables. National development banks, such as Brazil's BNDES, and multilateral institutions have played a critical role in advancing green energy projects by mobilizing climate and environmental financing. This trend will likely persist in 2026 as fiscal constraints continue to challenge governments across the region."

A **Stefanie Ólives, attorney at Machado Meyer in São Paulo:** "The trends that will shape renewable investment in Latin America in 2026 are not about resource availability. They are about institutional credibility, access to long-term financing amid elevated interest rates and whether governments can strategically direct capital rather than merely attract it. The exits of Iberdrola from Mexico and Enel from Colombia in 2025 were not isolated decisions; they signaled a broader recalibration toward jurisdictions capable of managing the consequences of renewable expansion. Chile is best positioned to accelerate. With wind and solar exceeding 40 percent of its grid, the country has moved past deployment into the harder work of integration. Forced by severe curtailment in the Atacama, Chile built storage remuneration mechanisms ahead of its neighbors and now operates a rapidly expanding fleet of utility-scale batteries. It understood early that a renewable asset's

value depends entirely on the system's ability to absorb it. Brazil remains a paradox. The decline in solar installations in 2025 is a symptom of deeper structural issues, not a lack of investor interest. The country's grid was already predominantly clean; the real opportunity was strategic modernization for energy exports via hydrogen and batteries, not simply adding more megawatts. Instead, capital flowed into generation while transmission upgrades and storage regulation fell behind. A legal framework for batteries only passed in late 2025, but detailed ANEEL regulation remains pending, and the first dedicated auction is set for April 2026. Brazil has spent a decade adding capacity to a system that was not ready to receive it. Argentina, Mexico, Colombia, Ecuador and Peru are likely to fall behind. Argentina's political and financial attention remains fixed on Vaca Muerta shale, and macroeconomic instability makes long-duration projects difficult to finance. Mexico's regulatory uncertainty and the primacy of state-owned generation deter commitments requiring decades of contract certainty. Colombia's world-class wind corridor in La Guajira remains stalled by transmission delays and protracted social licensing disputes. Peru and Ecuador face elevated country risk that pushes capital costs beyond viability for many projects. The markets that will lead in 2026 are those that address a hard question: what to do with the capital once it arrives."

A **Ramón Fiestas, senior advisor at the Global Wind Energy Council in Brussels:** "The expansion of electrification in Latin America through renewable energy sources is driven not just by political commitments to the energy transition, but by significant market-driven factors—not just a change in energy sources, but integrated, cross-sectoral developments that link energy, industrialization, water, agriculture and land-use systems, and that override environmental pledges where efforts are directed toward ensuring energy security for households

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the contract, Reuters reported on Wednesday. Local businesses lost out on at least \$290 million in revenue due to the outages last week, Bloomberg News reported.

Puerto Rico Sues Private Power Utility Firm Luma

Puerto Rico's government on Dec. 11 filed a lawsuit against private power utility firm Luma in an effort to cancel the contract that grants the company oversight of the island's electrical grid, the Associated Press reported. The firm, which is controlled by a consortium of Canadian and U.S. companies, took over management of power transmission infrastructure in 2021 from Puerto Rico's Electric Power Authority, which struggled to restructure

Fuel oil-fired power plants account for more than 60 percent of Puerto Rico's power generation.

billions of dollars in debt accrued in the wake of Hurricane Maria in 2017. Luma has since faced criticism from Puerto Rican civil society, as well as politicians across the ideological spectrum, for widespread blackouts that continue to affect the island. Transmission failures caused near-total power outages in Puerto Rico at least twice within the last 12 months, including on New Year's Eve last year and during Holy Week this year. "Luma's actions, their poor service, and their lack of interest in resolving the complaints leave us with no alternative but to resort to the court," Puerto Rico Governor Jenniffer González-Colón said Dec. 11 in a message posted on social media site X. "Despite the operator's expectations and representations, the electrical system has not improved with the speed, consistency or effectiveness that Puerto Rico deserves," she added. González-Colón said that Luma should be able to access nearly \$11 billion in U.S.

ADVISOR Q&A

What Will a New Right-Wing Government Mean for Chile?

Q Right-wing former lawmaker José Antonio Kast won Chile's presidential runoff election on Sunday, winning more than 58 percent of the vote, while his opponent, Communist Party candidate Jeannette Jara garnered just under 42 percent. Kast's victory positions Chile for its most right-wing government in decades. What factors explain Kast's victory and Chile's swing to the right? What are the most significant policies Kast is likely to pursue? What does his victory mean for Chile's economy and businesses, as well as investment in the country?

A Mariano Machado, principal analyst for the Americas at Verisk Maplecroft: "After a volatile decade, the election results showed that restoration beat refoundation. Voters reacted positively to José Antonio Kast's crisp proposals on public order and security, wrapped in the managerial idiom of an 'emergency government.' Under compulsory voting, that proposition resonated with the newly mobilized and the politically weary, as shown by the disproportionate share of the new compulsory voters he captured, and solving the second-round arithmetic of a fragmented right retracing the same fault lines as the 2022 plebiscite. Yet, Kast has a mandate, not a license. His 90-day playbook reads like an insurance policy against Chile's modern challenges: honeymoons that rapidly fade when delivery lags. Expect tougher bor-

der controls and the criminalization of irregular entry; a joint command pulling together the armed forces, police and investigators; an emphasis on real-time intelligence; and heavy symbolism—new uniforms and deployments, as well as high presidential visibility on tours. Kast is also likely to chase visible wins—think hospital waiting lists, housing rules and corruption audits—paired with rapid, narrow legislative proposals

der designed for speed rather than grandeur. For businesses, full-speed permitting reforms, regulatory streamlining and the unlocking of investment will resonate strongly with corporate ears, as would a credible fiscal plan. But tripwires abound: spending-cut headlines still light on detail, a temperamental public mood if policy hardening looks like rollback and a fragmented Congress that will demand coalition negotiations. Even so, a landslide gives him room to bargain hard—but it sets a brutally high bar for doing it well."

“Kast has a mandate, not a license.”

— Mariano Machado

EDITOR'S NOTE: More commentary on this topic appears in the Q&A of Tuesday's issue of the daily Latin America Advisor.

with undisclosed power utility firms located on the U.S. mainland that could replace Luma, according to the wire service. In a statement, Luma said it is considering legal options and is "remaining committed to Puerto Rico's energy

NEWS BRIEFS

Brazilian Senate Passes Legislation to Shorten Bolsonaro's Sentence

Brazil's Senate on Wednesday passed legislation that would cut nearly 25 years off of the 27-year prison sentence of former President Jair Bolsonaro, who was convicted earlier this year on charges that he orchestrated a coup attempt following his 2022 election loss to now-President Luiz Inácio Lula da Silva, Reuters reported. The lower house of Congress passed the bill last week; it now goes to Lula's desk. Sources close to Lula say the president is likely to veto the measure, but he has yet to publicly comment on the matter, Reuters reported.

Bolivia to Eliminate Subsidies for Diesel, Gas

Bolivian President Rodrigo Paz said Wednesday that his government will soon begin eliminating fuel subsidies in an effort to cut public expenditures, Reuters reported. Bolivia's government has subsidized diesel and gasoline since 2006—the move means at-the-pump prices for gasoline in Bolivia will increase by more than double, and diesel prices will nearly triple. Bolivia's government plans to fix the higher price point for at least six months, hydrocarbons minister Mauricio Medinaceli said, Reuters reported.

S&P Global Boosts Argentina Credit Ratings

S&P Global on Wednesday raised its long-term foreign currency sovereign credit rating for Argentina to CCC+ from CCC, Reuters reported. In boosting the rating, S&P cited better liquidity and a decline in economic vulnerabilities following the country's midterm legislative elections. S&P also increased its local currency sovereign credit ratings for Argentina to CCC+/C from SD/SD, reversing a downgrade that it had announced in February.

transformation, the AP reported. Luma added that it has replaced electrical infrastructure including transformers, breakers and poles, maintained substations and invested in excess of \$2.4 billion in federally funded projects. "We are proud of the measurable progress we have made but there is still much more to be done," the company said in a statement, calling the lawsuit politically motivated, the AP reported.

POLITICAL NEWS

Trump Demands That Venezuela Return Seized Assets

U.S. President Donald Trump on Wednesday demanded that Venezuela's government return assets that it seized years ago from U.S.-based oil companies, the Associated Press reported. The demand came a day after Trump said he was ordering a blockade of sanctioned oil tankers arriving and departing Venezuela, and it followed U.S. forces' seizure last week of a sanctioned oil tanker carrying \$80 million in Venezuelan oil. "You remember they took all of our energy rights. They took all of our oil not that long ago. And we want it back. They took it—they illegally took it," Trump told reporters. U.S.-based oil companies dominated Venezuela's oil industry until the South American country made moves to nationalize the oil sector in the 1970s and then again this century under President Nicolás Maduro and his predecessor, Hugo Chávez, the wire service reported. Also on Wednesday, the U.S. military destroyed another boat allegedly carrying illegal drugs in the eastern Pacific, U.S. Southern Command said in a post on social media site X. Four people were killed in the strike, it added. Including Wednesday's airstrike, U.S. forces have destroyed 26 allegedly drug-laden vessels in the Caribbean and eastern Pacific, killing 99 people since the campaign began in early September. The U.S. Senate on Wednesday approved a \$900 billion defense spending bill that also pushes Defense Secretary Pete Hegseth to provide Congress with video of a lethal Sept. 2 airstrike that initially left two survivors clinging

to the wreckage of their boat, The Washington Post reported. The survivors were then killed by a second missile. The spending bill, which the House of Representatives passed last week, withholds 25 percent of Hegseth's travel budget until he provides the video to Congress.

ECONOMIC NEWS

Brazil May Walk Away From Free Trade Deal With E.U.: Lula

Brazilian President Luiz Inácio Lula da Silva said Wednesday that Brazil could walk away from a major free-trade agreement between Mercosur and the European Union if some European countries manage to successfully delay a vote on the long-stalled deal that is currently scheduled for Saturday, the Financial Times reported. On Wednesday, Italian Prime Minister Giorgia Meloni told Italy's parliament that the current E.U.-Mercosur deal, which was agreed to last December, insufficiently addresses "the concerns of our farmers," Reuters reported. Meloni said that it "would be premature" to sign the free-trade agreement as planned on Saturday. Italy joins France, Poland and Hungary among E.U. members calling to delay the deal's approval, according to the wire service. France's government has spoken out against the free-trade agreement throughout this past year, criticizing a lack of "mirror clauses" applying E.U. environmental regulations to agricultural products from the four core Mercosur countries. Lula expressed frustration toward the growing likelihood of a delayed ratification during a cabinet meeting on Wednesday, saying, "We've conceded everything that diplomacy could possibly concede ... the agreement is more favorable to them than to us," the FT reported. European Commission President Ursula von der Leyen still plans to travel to Brasília on Saturday to sign the free-trade agreement, E.U. officials told the FT on Wednesday. A group of farmers staged a protest against the E.U.-Mercosur deal in Brussels on Wednesday, blocking roads and throwing produce on the street near the European Parliament building.

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and consumers. Electricity demand and large energy consumers are key drivers of wind and solar power, as stakeholders seek stable and competitive energy prices. They also seek secure supplies from environmentally friendly sources, which can only be provided by mature technologies capable of being implemented in short periods, and which are unaffected by price volatility and supply shortages resulting from geopolitical tensions and forces that control fossil fuel markets. We can see streamlined energy policies in countries with opposing political sensitivities like Chile, Argentina, Brazil and Mexico, addressing strong growth for wind and solar projects in their energy markets by calling for transmission grid expansion and battery storage systems for integration of mainstream variable energy sources to unlock their existing huge potential. Political instability is leading to uncertainty in almost all developed countries. Private investors and financiers are used to navigating those conditions in the region, but expect public finance to play an increasingly relevant role addressing country risk perception and mitigation, especially in energy markets that are the most committed to decarbonization.”

A **José Fernando Gómez Rojas, executive director, and Valentina Rincón, renewables and transition minerals program leader, both at the Center for Responsible Business and Entrepreneurship (CREER) in Bogotá:** “Latin America is a leader in the global energy transition, generating nearly 65 percent of its electricity from renewable sources. This reflects the region’s abundant natural resource endowment and access to clean technologies, driven by a cost-competitive global market. But the pace of the transition faces structural macroeconomic challenges, including the high cost of capital, monetary volatility, rising public debt and a geopolitical environment that introduces uncertainty into trade and investment policies, particularly in countries undergoing political change. Uruguay stands out as a demon-

stration of a successful energy transition, with more than 90 percent of its electricity generated from renewable sources. This is supported by regulatory and political stability, long-term contracts, low monetary volatility, stable access to international financing, broad social acceptance and transmission infrastructure that enhances system flexibility and reliability. Brazil leads the region in installed solar and wind capacity, supported by a robust regulatory framework and a public policy strategy aimed at offsetting the gradual decline in fossil fuel revenues through expanded renewable infrastructure. Chile has achieved a high penetration of solar and wind energy, exceeding 40 percent of its energy mix. However, political change under a new government may introduce challenges related to environmental licensing processes, highlighting the need to balance project expansion with investment risks and community rights. Colombia presents significant potential, but progress has been constrained by regulatory uncertainty, social risks and territorial conflicts—underscoring the importance of incorporating social viability and human rights-based approaches into renewable energy expansion. Mexico is advancing more cautiously, with a recent regulatory framework that emphasizes social considerations but generates investor caution. In contrast, Argentina faces severe macroeconomic and fiscal constraints, as well as a policy focus on hydrocarbons and nuclear energy, which significantly limits renewable energy expansion. Overall, the future of renewable energy in Latin America will depend on states’ ability to reduce macroeconomic risks, ensure regulatory stability and align the energy transition with socioenvironmental agendas. Private capital will play a fundamental role, but its participation will require the consistent integration of human rights and just-transition considerations—an indispensable condition for consolidating low-carbon energy growth. Otherwise, uncertainty and weak legitimacy in engagement with territories and communities are likely to persist.”

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