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Energy Advisor

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April 3, 2026

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FEATURED Q&A

How Is Canada's Oil Sector Positioned Amid Market Unrest?



Canadian oil producers are actively pursuing new pipeline projects to increase and diversify the country's exports of hydrocarbons. // File Photo: laughingmangovideo via Adobe Stock.

Q Canadian firms are looking to move forward on a new pipeline project to boost crude oil exports from Alberta province by at least 400,000 barrels per day, Strathcona Resources executive chairman Adam Waterous told Reuters on March 9. Canada's government is actively reviewing various proposals for potential pipeline routes, including one to the Pacific coast of British Columbia that would supplement the Trans Mountain Pipeline, and another proposal from energy infrastructure company South Bow that would connect to the U.S. Gulf Coast using existing sections of the canceled Keystone XL pipeline. Which new pipeline route—Pacific or Gulf—would be more beneficial to Canada's goal of increasing and diversifying its export capacity? How might a new Canadian pipeline project play into negotiations surrounding the USMCA trade agreement? What is Canada's role in the ongoing global energy crisis brought by conflict in the Middle East?

A Melissa Stoesser Young, partner and energy and major projects team lead at McMillan LLP: "The calculus between these two routes is ultimately a question of whether Canada is optimizing for price or for resilience. The Gulf Coast route, using repurposed sections of the canceled Keystone XL corridor, offers the near-term commercial advantage of connecting Alberta's heavy crude directly to the world's largest refining complex at Houston—a market with demonstrated appetite for heavy grades. But it also deepens Canada's structural dependence on a single export relationship with the United States at a moment when USMCA renegotiations have introduced new

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TOP NEWS**ENERGY TRANSITION**

Brazilian Solar Imports Shrink Amid New Tariffs

Brazil's solar module imports declined by 24 percent last year. Brazil recently raised its import tariff rate for solar modules from 9 percent to 25 percent.

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OIL & GAS

Trump Allows Russian Oil Ship to Dock in Cuba

A Russian oil tanker carrying 730,000 barrels of oil arrived in Cuba on Monday. U.S. President Donald Trump said he had authorized the vessel to break an effective U.S. energy blockade.

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OIL & GAS

U.S. Appeals Court Throws Out YPF Case

A U.S. court struck down a ruling forcing Argentina to pay more than \$18 billion to former shareholders of state-run oil firm YPF. Argentine President Javier Milei called the ruling "the greatest judicial victory in national history."

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Milei // File Photo: Japanese Gov't via Wikimedia Commons CC BY 4.0.

OIL & GAS NEWS

Gulf Oil Spill Likely Caused by Pemex Pipeline: NGOs

Satellite imagery shows an oil spill in Mexican waters off the coast of Veracruz state was likely caused by a ruptured pipeline operated by Mexico's state-run oil firm, Pemex, a coalition of nongovernmental environmental advocacy groups said on Monday, the Associated Press reported. Mexico's government has said that the spill began last month and was caused by natural causes and a leaking tanker ship. The environmental organizations say the spill first appeared in February. Pemex denied that any of its pipelines were responsible for the oil spill in a statement on Tuesday, the AP reported. President Claudia Sheinbaum addressed the issue on Tuesday, saying "no leak has been reported" in state-run oil infrastructure, according to the wire service. Last week, Reuters reported that Pemex had yet to rule out the structural failure of its underwater rigs in the area of the spill. The firm has not announced any reduction in operations at its upstream facilities in the Gulf of Mexico, where it pumps more than 1.5 million barrels of oil per day. On March 26, Mexican officials said the spill was likely caused by a combination of submarine leakage and a petroleum tanker whose identity has yet to be determined, Reuters reported. Admiral Raymundo Morales, the chief of Mexico's navy, said any one of 13 ships that passed through the area could have contributed to the oil spill that has caused petroleum products to wash up on the shores of Tabasco, Veracruz and Tamaulipas states in recent weeks, the wire service reported. Four of the vessels are currently under inspection by the Mexican navy, but the other nine are now in international waters, Morales added. Mexican Environment Secretary Alicia Bárcena told reporters on March 26 that the spill has been relatively contained, saying, "We have not detected severe environmental damage," the AP reported. At least six species of sea turtles, birds and fish have been contaminated by the oil spill, the AP reported.

Mexico's navy is coordinating with state-run oil firm Pemex to deploy marine barriers that can protect some wildlife and beaches from further damage, Morales said.

Shell Reportedly in Talks With Venezuela on Gas Projects

British oil supermajor Shell is in talks with Venezuela's government to develop four new offshore natural gas projects, including one that extends into Trinidad and Tobago's territory, Reuters reported Wednesday, citing two unnamed sources close to the matter. The new gas fields are located adjacent to the Dragon project, a gas deposit of 4.2 trillion cubic feet that Shell has been trying to develop for years; last month, the firm signed a preliminary agreement with the government of interim Venezuelan President Delcy Rodríguez to move forward with the project, as well as two other new onshore projects in Venezuela. Shell expects to send gas produced from any offshore projects in Venezuelan waters to Trinidad's Atlantic LNG export facility, which shuttered one of its liquefaction units in 2024 amid dwindling natural gas supply, Reuters reported. Commercial production from the Dragon project is expected in the second half of 2027, Trinidad and Tobago's energy minister, Roodal Moonilal, said last month, Reuters reported. Shell is set to make a final investment decision on the project by the end of this year; the sources did not say under what timeline the new offshore gas projects would be developed, the wire service reported. The addition of four new Venezuelan blocks to Shell's portfolio of gas projects in the area would bring the firm's combined reserves in Venezuelan-Trinidadian waters to 20 trillion cubic feet of natural gas, according to Reuters. Shell is actively looking to increase its footprint in Venezuela, CEO Wael Sawan said last week at a conference in Houston, Bloomberg News reported. "We have a huge amount of Venezuelan staff within Shell today ... we are looking at where we can add value to Venezuela, to the Venezuelan people," Sawan said, the news service reported.

NEWS BRIEFS

Mexico Has 'Every Right' to Provide Oil to Cuba: Sheinbaum

Mexico has "every right" to provide Cuba with large shipments of oil, Mexican President Claudia Sheinbaum told reporters on Monday, Reuters reported. Some private firms based in Cuba have approached Mexico's government in recent weeks asking to purchase oil from state-run Pemex amid growing fuel shortages caused by a U.S. energy blockade, Sheinbaum said. Mexico was Cuba's second-largest source of oil imports last year.

Brazilian Solar Imports Shrink Amid New Tariffs

Brazil's imports of solar energy modules declined by 24 percent last year compared to 2024, news site PV Magazine reported on Monday, citing a research statement from consultancy Greener. Solar imports slowed substantially in the second half of last year after Brazil's government began enforcing a new tariff rate of 25 percent for modules, PV Magazine reported. Module imports to Brazil had been subject to a 9 percent levy until late 2024. Nearly 80 percent of Brazil's module imports last year were destined for the small-scale distributed generation segment.

Caricom Chief Calls For Energy Integration

The annual energy conference for the Caribbean Community, or Caricom, began on Tuesday, with Secretary-General Carla Barnett calling for stronger regional collaboration in the areas of hydrocarbons, renewable energy and electrical transmission, Caribbean National Weekly reported. "The Caribbean region is endowed with a remarkable diversity of energy resources," Barnett said. Caribbean countries must do more to attract large-scale investment to reduce their dependence on imported fuel, she added, the newspaper reported.

Trump Allows Shipment of Russian Oil to Reach Cuba

A Russian oil tanker carrying 730,000 barrels of crude oil arrived Monday at Cuba's main oil terminal of Matanzas, the Associated Press reported, citing a statement from Russia's transportation ministry. On Sunday, U.S. President Donald Trump told reporters that he had authorized the vessel, the Anatoly Kolodkin, to break the effective U.S. blockade of energy products entering Cuba amid worsening humanitarian conditions on the island, the AP reported. "The people need heat and cooling and all of the other things," Trump said on Sunday, Reuters reported. The move is a reversal from Trump's decision last month to block Cuba from benefiting from a new U.S. sanctions waiver for Russian oil products, Reuters re-

“The [Cuban] people need heat and cooling.”

— Donald Trump

ported. Before the Anatoly Kolodkin, Cuba had not received any large-scale shipments of oil products since Jan. 9. Fuel oil powers most of Cuba's electrical grid; at least three widespread blackouts occurred last month amid dwindling supplies of fuel, the AP reported. "Cuba is finished ... whether or not they get a boat of oil, it's not going to matter," Trump said on Sunday. On March 27, Trump told a conference in Miami that "Cuba is next," referring to U.S. military action this year in Venezuela and Iran, Reuters reported. The crude oil on board the Anatoly Kolodkin must be turned into refined products before it can be used to refill Cuba's stocks of fuel oil and jet fuel, which could take multiple weeks. Last year, before the U.S. government stepped up its diplomatic efforts to block Cuba's oil supplies, the communist-run island consumed an equivalent of more than 100,000 barrels of crude oil per day, Reuters reported. The Anatoly Kolodkin's cargo could supply

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uncertainty over tariffs and energy trade rules. The Pacific route, by contrast, offers genuine diversification: access to Asian refinery markets, reduced basis differentials and political leverage in trade negotiations. The Trans Mountain expansion (completed in 2024) and Coastal GasLink's first LNG shipment (2025) proved that Pacific egress is commercially viable despite regulatory headwinds—a second Pacific corridor for oil export would consolidate that positioning. On Canada's broader role as a global supplier, higher oil prices resulting from the Strait of Hormuz closure have already elevated Canadian heavy crude premiums as buyers scramble to displace lost barrels from the Persian Gulf. Canada's stable rule of law, treaty-protected investment frameworks and proximity to U.S. infrastructure give it structural advantages few alternative suppliers can match. The key risk affecting any new pipeline's viability is regulatory: Canadian federal and provincial environmental review timelines remain the most significant variable, and absent greater regulatory certainty, a new Pacific route may struggle to proceed. For a Gulf Coast route, the risk is compounded by the requirement to secure U.S. federal approvals—a dual-jurisdiction burden that the Pacific route, falling entirely within Canadian sovereign authority, does not carry."

A **Celina Hwang, director of Canadian crude oil markets at S&P Global Energy:** "S&P Global Energy estimates that Western Canada will need incremental crude pipeline capacity as early as the 2026-2027 winter. The major export pipelines have announced expansions totaling more than 1.1 million barrels per day, of which 300,000 barrels per day would be capacity heading to Canada's west coast. Additionally, the governments of Alberta and Canada signed a memorandum of understanding to consider a greenfield pipeline from the oil sands to the west coast, of at least one million barrels

per day. Incremental capacity, regardless of direction, would be in Canada's best interest by removing pipeline capacity as a limiting factor on production growth. The current energy crisis underscores the importance of alternative crude sources, and Canada has significant resources available to tap and supply to the global markets. However, accelerating supply growth is unlikely in the short term because of the long lead times re-

“Canada needs more pipeline capacity to take advantage of this opportunity.”

— Celina Hwang

quired, especially in the oil sands, to commit to new upstream investments and generate incremental supply. Currently, Canada is the largest producer of heavy, sour crude globally at more than three million barrels per day. By comparison, all of Latin America collectively produced 2.9 million barrels per day of heavy, sour crude in 2025. While demand for crude is expected to decline slightly over the long term, maturing production elsewhere in the world, as well as renewed interest in diversity of supply, will provide Canada an opportunity to gain market share. However, Canada needs more pipeline capacity to take advantage of this opportunity."

A **G. Kent Fellows, assistant professor and director of graduate programs at the University of Calgary's School**

of Public Policy: "Canada is one of two major oil producing nations without a dominant state-owned oil company, the United States being the second. Given the nature of the industry, those governments cannot compel additional oil production in response to the Iran conflict. However, Canadian producers do respond to market forces when they aren't otherwise constrained. If global price expectations are high enough for long

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Cuba for approximately one month, considering active rationing policies, according to the wire service. [Editor's note: See related [Q&A](#) on Cuba's energy crisis in the Jan. 30 issue of the Energy Advisor.]

U.S. Appeals Court Throws Out YPF Expropriation Case

A U.S. federal appeals court on March 27 voted 2-1 to strike down a ruling forcing Argentina's government to pay more than \$18 billion to former shareholders of state-run oil firm YPF, which was nationalized in 2012, Reuters reported. U.S. District Judge Loretta Preska had ordered the award in 2023, but the appeals court in Manhattan ruled that she had misinterpreted Argentine law, Bloomberg News reported. The decision is a major victory for the government of Argentine President Javier Milei, which is preparing to return the country to international

Argentina's debt to YPF creditors had reached \$18 billion with interest.

bond markets. "It's historic, unthinkable, the greatest judicial victory in national history," Milei said March 27 in a post on social media site X. \$18 billion is roughly half of Argentina's annual federal budget, meaning the government likely would have been forced to sell its 51 percent stake in YPF, Argentina's second-largest company, to satisfy Preska's ruling. "Had we paid them, it would have represented an enormous obstacle on the path to economic recovery—in terms of country risk, interest rates and reduced growth," Milei said during a televised address on Feb. 27, Infobae reported. U.S. Circuit Judge Denny Chin wrote in his majority opinion that the United States ultimately lacked jurisdiction to enforce a penalty arising from Argentine contract law, Reuters reported. YPF's former majority shareholder, Spanish oil major Repsol, received \$5 billion in compensation for its shares in YPF from the Argentine

ADVISOR Q&A

Will Inflation Become More of a Problem in Peru?

Q **The board of directors of Peru's central bank on March 12 held its benchmark interest rate unchanged at 4.25 percent despite rising inflation, the bank said in a statement. Consumer prices in Peru grew by 2.2 percent year-on-year in February, up from 1.7 percent the previous month; the central bank said energy and food prices were chiefly to blame for the increase in inflation. How exposed to inflationary pressure is Peru as compared to other major economies in Latin America? Which industries or sectors are driving Peru's economic growth? What would an environment of relatively high inflation mean for Peruvian politics ahead of the country's general election on April 12?**

A **Mónica Muñoz-Nájjar Gonzales, executive subdirector of REDES (Red de Estudios para el Desarrollo) in Lima:** "Peru currently stands as a paradox of institutional stability. Despite a volatile political climate that has seen three different presidents in less than six months, the country maintains an outstanding macroeconomic anchor within the region. With year-on-year inflation at 2.2 percent as of February, Peru exhibits significantly lower exposure to price pressures than peers such as Colombia (5.29 percent), Mexico (4.02 percent) or Brazil (3.81 percent). This achievement is rooted in an economic model that has reduced public debt to approximately 32 percent

government in 2014, but other smaller partners say they never received tender offers for their stakes in YPF. Litigation funder Burford Capital, which backed former minority partners of YPF and would have collected a substantial portion of the award, saw its share price on

of GDP and fostered private investment, which is currently leading the recovery with a projected growth of 9.5 percent. However, this resilience faces a critical test due to an external cost shock: The global energy crisis has spiked import prices for fuel and logistics, causing a short-term inflationary uptick that could erode purchasing power in the heat of the electoral campaign. This monetary challenge is compounded by a troubling weakness on the fiscal front. According to the Fiscal Council, Congress has recently passed laws representing a permanent annual cost of \$3.3 billion (11.4 billion soles), including financial bailouts for state-owned enterprises and pension benefits for specific groups without requiring structural reforms or management improvements. Heading into the April 12 general election, this deterioration of fiscal rigor, combined with rising energy costs, creates a climate of marked uncertainty. In a fragmented electorate, discontent over the cost of living and the perception of inefficient public management act as catalysts for populist proposals. While these risks are currently mitigated by the country's strong fundamentals, they raise serious questions regarding the sustainability of Peru's economic discipline over the next five-year term."

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

the New York Stock Exchange plunge by more than 50 percent on March 27, Bloomberg News reported. Burford could still appeal its case to the U.S. Supreme Court, according to the news service. [Editor's note: See related [Q&A](#) in the Feb. 20 issue of the Energy Advisor.]

NEWS BRIEFS

Argentina Boosts Limit for Ethanol Blending Amid Oil Market Crisis

Argentina's government will allow firms to increase the proportion of ethanol used in gasoline to offset the effects of rising global prices, Argentina's Energy Secretariat said on March 27, Reuters reported. The measure, which is voluntary and does not impose new requirements on refiners, will allow blends of as much as 15 percent ethanol content for gasoline sold in Argentina. The average price of gasoline in Argentina increased by 18 percent in March, according to the wire service.

Brazilian Environment Minister Steps Down to Run for Congress

Brazilian Environment Minister Marina Silva will step down from her role to run for a seat in Congress in Brazil's October election, she said Wednesday in an Instagram post. Under the leadership of Silva, a high-profile member of the cabinet of President Luiz Inácio Lula da Silva, Brazil's annual deforestation rate declined by more than 50 percent between 2022 and 2025, the Associated Press reported.

Sheinbaum Appoints New Foreign Minister Amid USMCA Negotiations

Mexican President Claudia Sheinbaum on Wednesday named Robert Velasco, subsecretary for North America at Mexico's foreign ministry, as the country's new top diplomat after incumbent Foreign Relations Secretary Juan Ramón de la Fuente asked to resign due to health concerns, the Associated Press reported. Velasco's appointment comes as Mexico and the United States have begun formal negotiations ahead of the July review period for the USMCA trade deal. Velasco, 38, has been involved in trade talks with the United States and Canada since 2020.

POWER SECTOR NEWS

Guatemala Awards 1.4 GW in Largest-Ever Power Auction

Guatemalan energy regulators on March 27 awarded contracts to 37 new renewable energy projects with more than one gigawatt in total electrical capacity, sources close to the matter told news site Strategic Energy. An additional 340 megawatts in capacity was awarded to hybrid projects using natural gas. The power auction marked the largest tender in Guatemala's history in terms of new electrical capacity, according to Strategic Energy. The auction winners are set to be publicized on April 16, the news site reported. Oil- and coal-fired power generation currently account for more than 30 percent of Guatemala's electricity supply, according to data from the International Energy Agency. Approximately 5 percent of the Central American country's power supply comes from wind or solar energy.

POLITICAL NEWS

First Foreign Soldiers of U.N.-Backed Force Arrive in Haiti

A contingent of soldiers from the African nation of Chad arrived in Haiti on Wednesday, marking the first foreign soldiers to be deployed from the United Nations-backed Gang Suppression Force (GSF), which was established last year, Al Jazeera English reported. The GSF is set to ultimately include 5,500 uniformed personnel, who will deploy between now and October "from Africa, Asia, Latin America and the Caribbean," the GSF said Wednesday in a statement posted on social media site X. The group's mission is to "conduct targeted intelligence-led operations against armed gangs, secure critical infrastructure and key roads, and protect civilians," it added. It's unclear how many Chadian troops

have been deployed or exactly what role they might play in assisting Haitian police forces' anti-gang operations. Also arriving in Haiti on Wednesday was the GSF's special representative, Jack Christofides, a U.N. official from South Africa who has overseen multiple peace-keeping missions in Africa, Al Jazeera English reported. The GSF's deployment comes as Haiti's provisional government faces a daunting task ahead of national elections scheduled for later this year. Gangs control an estimated 90 percent of Haiti's capital of Port-au-Prince and have expanded their attacks in some areas of the countryside in recent months; at least 70 people were killed on Sunday and Monday in attacks by gang members near the town of Petite Rivière in Haiti's central Artibonite region, Reuters reported. Fewer than 1,000 foreign troops, mostly from Kenya and the Dominican Republic, were stationed in Haiti at the beginning of this year as part of the initial U.N.-backed force that is being replaced by the GSF, according to the wire service. Those troops are set to depart the Caribbean nation later this year after the GSF's full deployment.

U.S. Lifts Sanctions Against Venezuela's Acting President

The administration of U.S. President Donald Trump on Wednesday lifted sanctions against acting Venezuelan President Delcy Rodríguez, the U.S. Treasury's Office of Foreign Assets Control said in a statement on its website. "We value President Donald Trump's decision as a step toward normalizing and strengthening relations between our countries," Rodríguez said in a post on social media site Telegram in response to the lifting of sanctions against her, the AP reported. "We trust that this progress will allow for the lifting of current sanctions against our country, enabling us to build and guarantee an effective bilateral cooperation agenda for the benefit of our people," she added. The lifting of sanctions against Rodríguez came a day after U.S. Secretary of State Marco Rubio met in Washington with Venezuelan opposition leader and Nobel laureate María Corina Machado, the Miami Herald reported.

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enough, we should expect to see expansionary investment if producers can get increased volumes to market. When the Trans Mountain Expansion (TMX) opened in May 2024, it alleviated an important constraint as much of the existing pipeline system had been operating at capacity for a decade. But TMX filled up quickly, recently running at up to 96 percent of its capacity prior to the Iran strikes. As Canada considers increased oil production and another new pipeline, the choice of route (west or south) may end up depending on who pays for the pipe. If the private sector decides to invest, then the southern route may be attractive due to prior work done on the Keystone XL proposal (although I'm not sure how much of that can be used now). If the public sector ends up footing all or part of the bill, then a Canadian route to tidewater is probably much more attractive. The western route also avoids a potential hold-up problem associated with exporting to the United States, who has proven a much less reliable trade partner under President Trump than in decades prior."

A **Lisa Baiton, president and CEO of the Canadian Association of Petroleum Producers (CAPP):** "Fast-tracking the infrastructure required to develop both existing and new markets is the most effective way to strengthen energy security across our continent and among our global trading partners. CAPP supports any new capacity that is commercially viable and can move Canadian oil and natural gas to market reliably. Canada has a natural advantage as a supplier to global markets, including Asia, with shorter shipping routes and competitive pricing. Accelerating the development of new markets and energy trading relationships will enhance our geopolitical strength and build a more resilient and prosperous economy for Canadians. Market diversification for the oil and natural gas industry is not about 'replacement.' Diversification means growing our customer base, production, exports and the Canadian economy. In parallel, Canada

needs to preserve the highly integrated energy trade relationship with the United States, which has been built up over a century and continues to create jobs and keep energy costs lower in each of our countries. The United States remains Canada's largest energy customer, by far. The U.S. economy benefits from purchasing reliable and secure Canadian oil and natural gas while Canada benefits from having fully integrated infrastructure directly tied to critical supply points in the largest oil and gas consuming market on the planet. Our infrastructure is highly interconnected, with refineries in the U.S. Midwest almost completely reliant on Canadian oil and regions in the Pacific Northwest dependent on Canadian natural gas. Quebec and Ontario refineries rely heavily on oil supplies delivered through U.S. pipelines, while about half of both provinces' natural gas supply comes from our southern neighbor. To that end, we should work to forge a renewed continental energy alliance that is attuned to these realities. The conflict in the Middle East has exposed the fragility of global energy systems, with key supply routes and infrastructure constrained. When energy supplies are disrupted, the ripple effects move quickly through the global economy—increasing the cost of transportation, heating and essential goods, even putting global food security at risk. Canada has a clear role to play at this moment. As a stable, democratic and responsible energy producer with abundant oil and natural gas resources, Canada could contribute meaningfully to support allies and global markets with reliable supply. Canadian energy can help reduce exposure to geopolitical chokepoints, strengthen energy security for importing countries and contribute to more resilient global supply chains. We need to act quickly and provide the clarity and regulatory certainty that will build a competitive investment environment today to enable the timely development of energy infrastructure so Canadian energy can reach global markets, support our allies and provide stability for the future."

ENERGY ADVISOR

is published weekly by the
Inter-American Dialogue ISSN 2163-7962

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1155 15th Street NW, Suite 800
Washington, DC 20005
www.thedialogue.org

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