



Canning House

Mexico Intelligence Report – 29th July 2016

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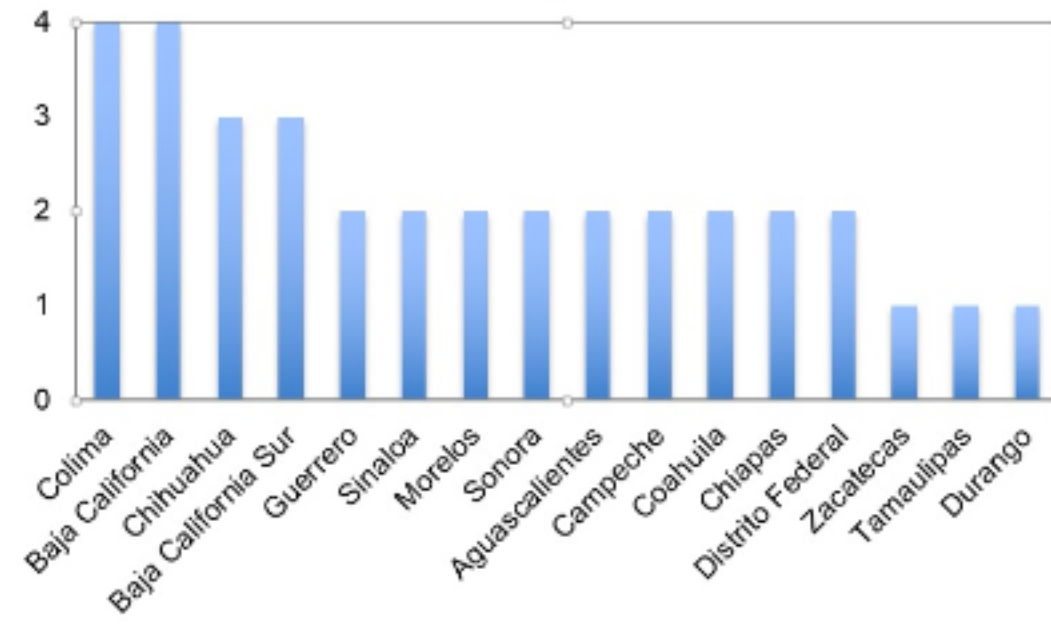
Homicide rates index

After three straight years in which the number of homicides in Mexico decreased, 2015 saw a new rise in violence as homicides grew by 2 per cent year on year, reaching a grizzly total 20,535.

The figures published by Mexico’s National Institute of Statistics and Geography, are a warning sign that although the issue of violence is less notorious than during Felipe Calderon’s administration, it is still not only very much present, but now a rising trend.

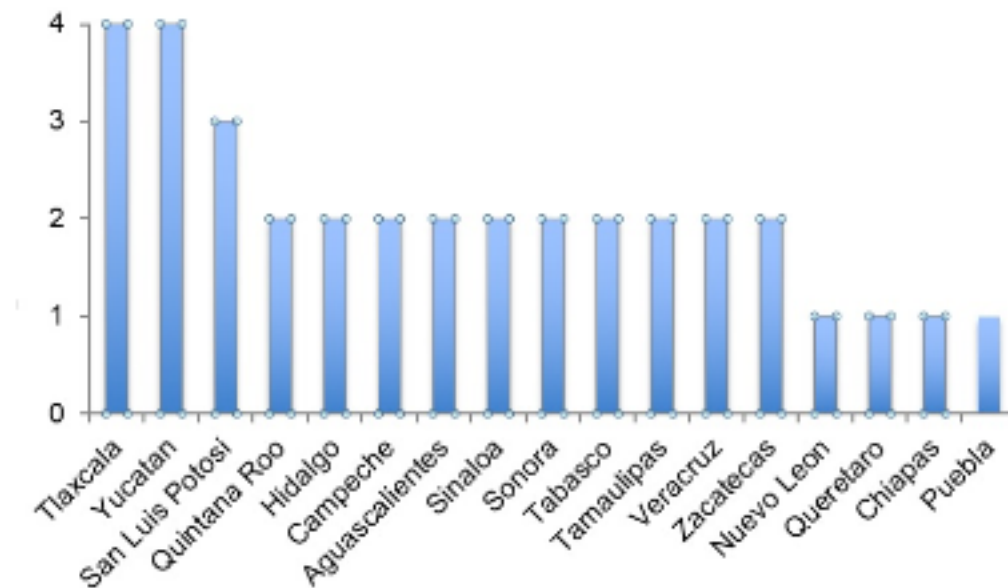
Furthermore, a closer look at the numbers during President Peña Nieto’s term suggests that violence tends to migrate across Mexico’s 32 states (see figures 1 & 2). From 2012 to 2015 a total of 16 states were at some point in the top quartile in terms of homicides rates per 100,000 inhabitants and only two of them (Colima and Baja California) were in top nine most violent states throughout the past four years.

Figure 1: states in the top quartile of homicides rates during 2012-2015



Source: INEGI

Figure 1: states in the bottom quartile of homicides rates during 2012-2015



Similarly a total of 17 states were in the bottom quartile in terms of homicide rates and, interestingly, only two of them were in the bottom nine throughout 2012-2015 (Tlaxcala and Yucatan).

Worryingly, figures released by Mexico’s Ministry for Public Security suggest that during the first half of 2016, homicides increased by 16 per cent compared to the same period of 2015. The Ministry publishes monthly figures for homicides based on the number investigations; as opposed to INEGI which publishes homicide yearly figures based on forensic death certificates, this tends to result a slightly lower numbers in the case of the Ministry.

Energy update: Pemex takes another step in Mexico’s new energy landscape

The National Commission for Hydrocarbons approved the bidding guidelines for Pemex

The National Commission for Hydrocarbons and Mining approved the bidding guidelines for the farm-out to farm out the deepwater block known as Trion Area in the Gulf of Mexico. Pemex estimates the area will require \$11 billion USD worth of investment and is considered to be one of the "crown's jewels" of Mexico's energy reform.

TRION was one of the blocks Pemex was awarded during Round Zero –the round in which it could pick and choose blocks it wanted to keep. The 1,284 km2 block will be awarded on the same data as the other 11 blocks up for tender in Round 1.4.

The technical and economic requirements stipulated by CNH are similar to Round 1.4, which CNH intends will help to lure in some of the 21 companies that have prequalified to bid in Round 1.4.

The farm out contract to be entered into will be a License Contract (35 years plus an additional 15) and interested parties can pre-qualify as Operators or non-Operators but only as part of a consortium.

The consortiums must have at least two operators and must observe the following splits:

Pemex E&P	45%
Appointed Operator	30% – 45% (min) (max)
Operator	10% – 25% (min) (max)
Non-Operator	10% or less (min)

The winning consortium must enter into a JOA template endorsed by Mexico's Ministry of Energy, specifically made for Pemex's farm-outs.

The Bidding Process is scheduled as follows:

Publication of guidelines	July 28 th
Request for access to the data room	August 29 th
Submission for prequalification	August 31 st
Delivery and prequalification documents	September 12 th – 15 th
Final version of Guidelines, contract and JOA	September 30 th
Publication of prequalified companies	November 9 th
Confirmation of bidders	November 14 th – 19 th
Opening of proposals	December 5 th

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