Terms of Reference: Consultancy on risks in the US-Mexico gas trade

May 2025

Introduction

NRGI supports informed, inclusive decision-making about natural resources and the energy transition. NRGI accompanies resource-rich developing countries to minimize harms and equitably benefit from growing demand for transition critical minerals, build inclusive economies that end dependence on fossil fuel extraction and manage revenues from natural resources in accordance with citizen priorities.

Background

Mexico depends highly on gas imports from a single country, the US, especially in the electricity and industrial sectors. Thus far, the US-Mexico gas trade has generally delivered secure, adequate supplies of gas with affordable prices for Mexican buyers and attractive returns for US suppliers. Partly for this reason, energy sector plans, policies, and public investments in Mexico continue to favor gas as a fuel for the country's energy needs.

NRGI believes, however, that stakeholders in Mexico are underestimating the risks and potential costs of continued dependence on gas. Our work seeks to contextualize the role of gas in Mexico, evaluating its impact on energy security, economic development, and the transition to a more sustainable energy system. We analyze whether structural dependencies on this resource exist and the key arguments that have reinforced its predominance. Our goal is to initiate a technical and strategic debate on the long-term viability of gas, identifying both risks and opportunities. As part of that, we seek an expert to deepen our understanding of future risks in the US-Mexico gas trade.

Scope of work

The consultant will advise NRGI on topics including:

- Future events that could disrupt US gas supplies to Mexico. Examples could include severe weather events, attacks on pipelines, commercial or political disputes.
- Potential vulnerabilities and bottlenecks in the existing gas supply and storage infrastructure in the US and Mexico.
- The different levers (legal, political, economic, security-based) that the US government could use to cut off or otherwise control gas supply to Mexico.
- Future events (e.g., new policies or levies, contractual changes) that could significantly impact the price of US gas going to Mexico.
- Other factors that could affect the willingness or ability of US companies to continue supplying gas to Mexico in the longer term.
- The prospects for exporting more US LNG through terminals in Mexico.
- The interests, influence, and track records of key US stakeholders (in government, private sector, civil society, etc.) who support or oppose gas exports to Mexico.

At the start of the assignment, NRGI will provide the consultant with a master question list. The consultant will answer the questions by drawing on their existing knowledge as experts, and by carrying out as-needed desk research, interviews and consultations with industry players and other experts.

The consultant will answer the questions both in writing and in conversation with NRGI staff. Specifically, this will entail:

- A first round of written responses to all questions in the master question list by mid-June. All responses must be properly supported by recent data and references.
- A virtual meeting with NRGI staff to discuss and clarify answers.
- One further round of written responses to supplemental questions posed by NRGI staff, with a follow-up virtual meeting by mid-July.
- Providing NRGI with copies of third-party documents and information (e.g., reports and articles, case studies, data) as requested, appropriate, and necessary to support the consultant's answers.
- Any other communications NRGI and the consultant agree are needed to complete the work.

Please also note that the consultant is not responsible for producing a final written report for this assignment. The final written responses to questions, together with any supplemental documents, data, etc. will constitute the full deliverables for the assignment.

Expected time commitment

The work will be carried out on a flexible basis, based on NRGI and the consultant's schedules. We expect the assignment will be part-time over 1-2 months.

Qualifications

- At least 7 years of experience as an analyst, researcher or similar position in a government agency, research institution, lender or company involved with the US-Mexico gas trade; 10+ years preferred.
- In-depth knowledge of the all the topics listed above under "Scope of work."
- Current, detailed knowledge of the players, infrastructure, contracts, regulations, and political dynamics in the US-Mexico gas trade.
- Experience communicating with a variety of audiences on US-Mexico gas trade issues.
- Willingness and availability to respond flexibly to the questions posed in the assignment.
- Full ability to conduct research and communicate (orally and in writing) in both English and Spanish.

To apply

- Please send a copy of your CV along with a financial proposal to procurement@resourcegovernance.org with asayne@resourcegovernance.org in cc no later than **May 19, 2025**.

Disclaimer: *This is not an employment opportunity and employment-related benefits do not apply to this consultancy.*