INSTITUTE OF THE AMERICAS | ENERGY & SUSTAINABILITY PROGRAM

ENERGY PANORAMA

Previous Edition

November Panorama

Welcome to the November edition of Energy Panorama.

Our featured report is the summary from the XXXIV La Jolla Energy Conference and three days of high-level discourse – during formal and informal sessions - on the forces reshaping global and regional energy markets.

Discussions explored how geopolitics—especially U.S.–China competition—is redefining supply chains and security, while the nonlinear nature of the energy transition continues to challenge policymakers particularly amid rising electricity demand, AI-driven load growth, and urgent grid needs.

Regional and country deep dive sessions highlighted Latin America's dual task of leveraging hydrocarbons for development while financing decarbonization, with LNG, natural gas, and critical minerals emerging as strategic assets dependent on sound governance and investment. Speakers emphasized pragmatic planning, stronger integration, and policies that balance affordability, security, and sustainability. A unique opening conversation underscored the need to advance gender equity and broaden inclusive strategies across the sector. Check out our detailed summary report for more.

We would like to especially recognize the role of graduate students from UC San Diego's School of Global Policy and Strategy (GPS) at LJC25. From those who served an active role as co-moderators to an even larger group that joined us to take notes (rapporteur duty) and very ably prepared the summaries of our discussions for the final report. Their participation is a key part of our Future Energy Leaders Initiative and what we call "La Jolla's Got Talent."

In addition, we invite you to check out the **highlight video** to get a glimpse of this year's event.

Understanding Mexico's New Energy Regulations - Part I

Given the evolving **legal and regulatory framework in Mexico's energy sector**, we organized a new webinar series that will explore the latest developments and assess the key markers and milestones as the Sheinbaum administration implements the new *reglamentos* and market structure.

For our first webinar, we were pleased to host two representatives from our Steering Committee member **Holland & Knight (Rodolfo Rueda and Regina Legorreta) and our Non-Resident Fellow, Francisco Salazar**. We invite you to watch the full recording.

IOA relaunches its IOA Podcast Series

November also marked the return of the Institute of the Americas Podcast Series. After a long break, we have relaunched our podcast series to dive into the subjects shaping Latin America and the Caribbean today and related to our work around energy, environment, economic competitiveness and geopolitics.

In our first episode, **Jeremy Martin spoke with Diego Von Vacano — a Professor of Political Science at Texas A&M University — to unpack Bolivia's recent presidential election and the country's historic political shift**. Their conversation explored why Bolivians voted for change, the challenges facing President Rodrigo Paz's centrist "popular capitalism," and particularly the approach to **developing Bolivia's significant lithium resources** and what the country's strategy means for its economic future, along with the key markers to watch during the first 100 days of Paz's presidency.

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More details coming soon. For inquiries, please contact us.

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