MIRANDA INTELLIGENCE

Miranda Intelligence – Public Affairs Chatter

Pemex Comes Clean, at Last

The prestige and credibility of Pemex suffered another blow when the company announced that the Gulf oil spill first detected in early March originated in one of the state oil company's pipelines at the Abkatún-Cantarell complex — not from a private vessel or naturally-occurring seepage, as officials had previously reported, and the President, no less, had validated.

The inter-agency task force commissioned by President Claudia Sheinbaum to investigate the spill also found that Pemex personnel concealed the problem from senior management and delayed closing the valve for eight days after the leak was identified, leading to the firing of three officials and the opening of a case with the Federal Attorney General (FGR). Without any evidence, but reflecting the lack of credibility of the company's top management over the years, some analysts inevitably have speculated whether higher up Pemex officials knew from the start the company was to blame, and are throwing lower-level officials under the bus.

The legal exposure for Pemex extends to administrative, civil and even criminal liability if prosecutors conclude there was negligence of reporting duties, spill containment was delayed or the affected communities were left uninformed, while coastal ecosystems and economies absorbed the fallout. Greenpeace's criticism that the government had originally focused more on discrediting the alleged claims of Pemex involvement (which were in fact broadly accurate) rather than addressing the environmental harm is legally relevant: dismissing three officials does not alone resolve institutional liability, remediation obligations or the cost of compensation.

There is also a financial credibility problem, for a company burdened with tens of billions of dollars of USA SEC-registered bonds, and further heavy debts owed to contractors and suppliers. Some analysts suggest that the admission of responsibility was driven in part by concern over disclosure and compliance risk in the United States and the possible impact on audited financials and loss of audit insurance or surety cover if active concealment was demonstrated.

The cross-border risk is sensitive, even if speculative. If contamination was shown to affect Texas waters or coastal economic interests, Mexico could face claims, diplomatic friction and a harder conversation under U.S. environmental law in the sensitive leadup to the USMCA review. So far at least fortunately there does not seem evidence of the problem affecting US coastlines.

For coming clean, albeit late in the day, Pemex and the authorities deserve some credit. But having done that, there is still much to clarify — the condition of Pemex's infrastructure, the adequacy of maintenance spending, the technical cause of the leak, the full scale of the losses and the remediation costs, and who was actually responsible, not only for the spill, but for the false assurances that followed. While the environmental damage has already been done; the legal and financial aftershocks are under way.

A New Prosecutor's Office, in Theory

Attorney General Ernestina Godoy has presented the FGR's 2026–2029 Strategic Prosecution Plan as a structural reset rather than a routine management document. Her pitch is that the office must move from a reactive model of mass case processing to one based on differentiated case management, the prioritisation of criminal phenomena and strategic prosecution. In institutional terms, the plan is meant to signal that the FGR no longer intends to treat justice as a bureaucratic workflow or a factory of statistics, but as a coordinated state function tied to democratic legitimacy and public order. (If it is not clear what that actually means in practice, you are not alone.)

The plan promises closer coordination with other institutions, multidisciplinary teamwork, standardised investigative protocols and a more functional internal structure. It also folds in familiar but still politically useful commitments: substantive equality, gender parity, zero tolerance for sexual harassment and discrimination, and a professional career service within the FGR. Operationally, the emphasis falls on strengthening prosecutors in extortion, disappearances and feminicide cases, while modernising the Criminal Investigation Agency. The broader message is that the federal government wants a prosecution model that looks more integrated, more technical and less administratively scattered than the one it inherited.

The difficulty, of course, is credibility. Godoy arrives with strong backing from President Claudia Sheinbaum, but also with criticism over opacity, limited engagement with the press and a lack of visible progress on high-profile cases. That matters because a strategic plan in prosecution policy is ultimately judged less by its language than by its ability to convert institutional redesign into prosecutorial results.

That credibility problem has been sharpened by the public outrage surrounding the murder of Edith Guadalupe Valdés Saldívar, the 21-year-old woman killed after going to a supposed job interview in a building on Avenida Revolución in Mexico City. In that case, the main scandal is not federal but local: the CDMX Fiscalía (where Godoy previously worked) has come under intense fire after officials allegedly asked the family for money to accelerate the search and delayed action despite having key information about her whereabouts. Mexico City prosecutors have since acknowledged an "unjustifiable" delay, suspended three officials and detained a suspect, while the case has become a lightning rod for broader anger over how local authorities handle femicide and disappearances. It is not an FGR case, but it

underlines the same core problem: grand institutional language about justice reform lands very differently when the public keeps seeing basic prosecutorial failures in the cases that matter most.

The line about “never again an opaque prosecutor’s office with a golden bureaucracy” is politically neat enough. The harder test is whether the FGR can show that coordination, intelligence and protocol reform will produce something the institution has long struggled to deliver consistently: visible, legally durable outcomes in the cases that most shape public trust.

Litigation Stays Open, at a Higher Price

Mexico has quietly adjusted part of the cost structure of tax litigation. A reform to Article 141 of the Federal Tax Code, published in the Official Gazette on April 9, changes the way taxpayers must guarantee the tax interest when challenging a tax credit, while also broadening the range of legally recognised instruments they may use. The immediate effect is straightforward: disputes with the tax authority become more demanding from a financial standpoint, even as the procedural toolkit becomes somewhat more flexible.

At the centre of the reform is the guarantee of the tax interest. In broad terms, taxpayers must now secure not only the principal amount and accrued accessories, but also the amounts expected to arise under the applicable rules over time. If the credit remains unpaid, the guarantee must be updated in line with the new regime. In practical terms, that increases the cost of keeping a dispute going, particularly when a taxpayer seeks to suspend enforcement while litigating the merits. Contesting the tax authority remains possible, but it is now less forgiving in financial terms.

The reform also removes the rigid order of preference that had previously limited how taxpayers could structure their guarantee. Taxpayers may once again rely more freely on the legally recognised forms available under the statute, subject to the relevant requirements and transitional rules. That matters because it restores some flexibility in how disputes are financed and defended, easing immediate pressure on liquidity even as the overall burden of guaranteeing the claim remains substantial. There is also a transitional dimension: existing proceedings and guarantees may, in certain circumstances, be adjusted to the new regime if the taxpayer follows the applicable procedure within the prescribed period.

Fears mount on INE independence

The terms of INE counselors Claudia Zavala, Dania Ravel and Jaime Rivera expired on April 3. Congress must now appoint replacements for nine-year mandates running to 2035. The mechanism is straightforward: a Technical Evaluation Committee (CTE) produces shortlists, and the Chamber of Deputies selects candidates by a two-thirds vote.

Over the weekend, the INE Technical Evaluation Committee published the names of the 50 candidates (25 men, 25 women) still under consideration for three vacant seats on the General Council. The coordinator of the PAN caucus in the Chamber of Deputies, Elías Lixa, declared that “to no one's surprise” the names considered the ruling party's favourites had been placed on separate shortlists, ensuring they would not have to compete against one another for the same seat. Late on Monday night, the Jucopo announced the final shortlist of 15 candidates — which includes some of the names close to the ruling party but not those closest to INE President Guadalupe Taddei — and Monreal said the Chamber would be ready to hold a first-round floor vote on Tuesday afternoon.

This matters because the INE was designed to remove electoral management from partisan hands. With three new appointments, Morena would secure a working majority within the council that will oversee the 2027 midterms and the 2030 presidential election.

For markets and investors, the issue is not electoral politics per se, but predictability and institutional checks and balances. Mexico’s democratic architecture has long been a stabilizing factor. Questions about its evolution, even if gradual, will resonate beyond the political sphere to investment confidence, particularly as the next electoral cycle approaches.

Chatter box

- **A Reset, Carefully Framed.** Sheinbaum’s trip to Spain was ultimately received less as a ceremonial state visit than as a controlled diplomatic reset. Spanish media coverage in RTVE, El País and other major outlets treated the visit as the clearest sign yet of a thaw in the Mexico–Spain relationship after years of bilateral distance, with her meeting with Pedro Sánchez serving as the most visible marker of that shift. The wider setting mattered. Sánchez and Luiz Inácio Lula da Silva used Barcelona to convene other progressive leaders in defence of democracy, including the presidents of Mexico, Colombia, South Africa and Uruguay, alongside representatives of other like-minded governments. That gave Sheinbaum’s presence a broader political context: not just bilateral normalisation with Madrid, but insertion into a more explicitly progressive and multilateral bloc at a moment when ideological signalling is once again doing a fair amount of diplomatic work.

  Sheinbaum held talks with Sánchez on strengthening bilateral ties and exploring cooperation in economic and cultural matters, met local authorities and Latin American leaders, visited the Barcelona Supercomputing Centre to underline technological cooperation, and used the consular stop to reinforce her connection with Mexicans abroad. She also used the summit setting to call for support for Cuba in the event of any military intervention, adding a more ideological note to a trip otherwise designed to look

pragmatic and forward-looking. The broader conclusion is that this was a political and diplomatic success, especially in terms of reopening channels with Spain and sharpening Sheinbaum's international profile.

- **Senate Considers Guardrails for AI.** The Senate's AI Analysis Commission is preparing to present what would be the country's first comprehensive AI regulation, establishing a tiered system of infractions and introducing the category of "extremely serious" (*gravísimas*) violations for the first time in Mexican legislation. Among the most serious violations are the use of AI for deliberate cognitive, political, or electoral manipulation; the deployment of lethal autonomous systems without meaningful human oversight; and mass biometric surveillance without a judicial order. The bill also includes robust protections against gender-based digital violence, explicitly banning the creation or distribution of non-consensual deepfakes, particularly those involving minors.

  The legislation would create several new institutions, including a National AI Authority, a National AI Strategy, a National AI Development Fund, and a National AI Certification System. It adopts a risk-based framework, placing stronger oversight requirements on high-risk systems while applying lighter rules to personal or limited-use applications. PRI Senator Rolando Zapata Bello, who chairs the commission, pushed back against criticism that the bill could restrict free speech, stating on X that the proposal "in no way limits or curtails freedom of expression or political debate" and "does not censor opinions or criticism." He noted the bill was built over 16 months of consultation with 72 specialists across academia, the public and private sectors, human rights organizations, and diplomatic circles, with participation from all political parties represented in the Senate.

- **Let's Keep Talking (Trade).** U.S. Trade Representative Jamieson Greer met with Economy Secretary Marcelo Ebrard and President Sheinbaum in Mexico City on Monday for high-level talks ahead of the USMCA Joint Review scheduled for July 1. Sheinbaum later posted on social media that talks were "advancing positively"; Ebrard called Greer's visit "a good sign" for the review process. Before heading to the National Palace, Greer met with Ebrard at the Club de Banqueros, where the U.S. presented its posture on the trade agreement and heard from private sector leaders who made the case for maintaining the trade pact. Key topics on the Mexican side included steel, aluminium, and the automotive industry — issues raised in a previous round of meetings in Washington. The joint press release from both governments confirmed that technical discussions would continue this week on economic security, rules of origin for industrial goods and critical minerals cooperation, and to "resolve outstanding bilateral trade irritants". The two sides also agreed to hold the first official bilateral negotiating round for the USMCA Review the week of May 25 in Mexico City.

- **Nothing to Hide.** UN High Commissioner for Human Rights Volker Türk arrived in Mexico for a series of meetings covering the country's human rights situation, with the crisis of disappearances as a central and sensitive backdrop. President Sheinbaum confirmed she would receive Türk at the National Palace on Wednesday, noting that his visit covers "the human rights system in Mexico, not only the issue of disappearances", a reference to a UN committee report on enforced disappearances that her government rejected earlier this month. In late March, the government presented a revised registry that broke down the official missing persons figures into categories — including tens of thousands of cases with incomplete data and others showing signs of continued activity — suggesting not all registered missing individuals were necessarily crime victims. Human rights organizations criticized the review as an attempt to minimize the problem. Then came the UN committee report, which concluded there were "well-founded indications" that enforced disappearances in Mexico may amount to crimes against humanity.

  Sheinbaum said the government plans to provide Türk with "very important documents" related to the disappearances issue during his visit. Türk posted a video to social media on Sunday, noting that Mexico has a "huge impact on the world", and that he had met with young people who talked to him about their concern for human rights and for the families of the disappeared.

- **CIA officials die in car crash.** The deaths of two U.S. officials in Chihuahua, identified by the *Washington Post* as CIA officers returning from the aftermath of a counternarcotics operation, are raising fresh questions about how far the U.S. role in Mexico's anti-cartel effort has expanded. The episode comes as the CIA has taken a more assertive posture in Latin America under John Ratcliffe, with a heavier emphasis on intelligence-sharing, training and surveillance support for local units. President Claudia Sheinbaum claimed in her morning press conference that her government had not been informed of the U.S. presence in Chihuahua, and stressed (as she would, of course..) that any foreign participation in security matters must be authorized by the federal government under Mexico's constitutional framework. She also reiterated that Mexico does not permit joint foreign operations on its soil beyond legally defined cooperation and information-sharing. Even if Mexican officials claim the Americans did not directly participate in the raid itself, the accident is likely to deepen scrutiny over where cooperation ends and intervention begins.

- **A Ministry Vacated for Electoral Priorities.** Citlalli Hernández's move from the Ministry for Women to Morena's new National Commission on Elections and Alliances is less an administrative reshuffle than a statement of political hierarchy. It suggests that, for Sheinbaum, the internal management of candidacies and coalition tensions ahead of the 2027 cycle now warrants direct intervention, even if that means creating a vacancy in one of the administration's more symbolically significant cabinet positions. Two names

are reportedly under consideration: Anaís Miriam Burgos, who requested indefinite leave from her seat in the lower house of Congress the day before Hernández's departure, and Ingrid Gómez, currently the ministry's undersecretary.

- **Legislating Against the Clock.** Ricardo Monreal said the Chamber of Deputies is entering the final stretch of the ordinary session with a heavy legislative agenda, including close to ten pending reforms still to be reviewed and voted on. Among the priority items are the secondary legislation for the 40-hour work week, intended to align the recent constitutional reform with its phased implementation, and the constitutional reform on feminicide, already approved by the Senate, together with its implementing law. He also pointed to an incoming anti-corruption bill, new migration legislation, environmental crime reforms and other bills expected from the Senate.

Laura Camacho
Executive Director Miranda Public Affairs & Intelligence
laura.camacho@miranda-partners.com