



Eyes on Mexico: Monthly Political Overview

April 2026

Top Highlights

Mexico-U.S. Engagement Prioritizes Rules of Origin Ahead of USMCA Review. Mexico President Claudia Sheinbaum held a meeting with U.S. Trade Representative Jamieson Greer in Mexico City to discuss the long-term vision of the United States-Mexico-Canada Agreement (USMCA) ahead of the joint review on July 1, 2026. Both parties reaffirmed their commitment to maintaining the agreement while identifying key areas for improvement, particularly the strengthening of rules of origin for strategic industrial sectors. The Mexican government reiterated its position against tariffs currently imposed by the U.S. on steel, aluminum and automotive exports, advocating for their reduction as part of broader trade discussions. In addition, both governments instructed their teams to advance technical negotiations on economic security, critical minerals and complementary trade measures, as well as address outstanding bilateral issues. Mexico also announced the reinforcement of its negotiating team – led by Secretary of Economy Marcelo Ebrard – with the inclusion of senior officials from the financial, agricultural and multilateral sectors, signaling a more coordinated and high-level approach to the upcoming negotiation phase.

Mexico Set to Nominate New Ambassador to the U.S. President Sheinbaum confirmed that she will nominate Roberto Lazzeri Montaño, current head of Nacional Financiera (Nafin), as Mexico's ambassador to the U.S., signaling a potential shift in the country's diplomatic and economic representation in Washington, D.C. The appointment remains subject to approval by the U.S. government and ratification by the Mexican Senate, in line with standard diplomatic procedures. Lazzeri brings prior experience from the Ministry of Finance, where he developed close working relationships with U.S. counterparts, as well as a recent track record leading Nafin's efforts to expand credit access and promote technological innovation. The nomination comes at a time when bilateral priorities are increasingly centered on trade and economic coordination under the USMCA framework. President Sheinbaum also indicated that current Ambassador Esteban Moctezuma Barragán could be reassigned to another role within the federal administration, underscoring broader adjustments within the government's international strategy.

CFE Advances Transmission Network Expansion. Mexico's government, through the Comisión Federal de Electricidad (CFE), is advancing a transmission expansion program for 2025-2030 aimed at ensuring reliable electricity supply and supporting economic growth. The initiative includes new transmission lines, substation upgrades and the incorporation of advanced technologies to increase system capacity and reduce congestion risks. To date, 30 projects have been completed with an investment of approximately MEX\$5.6 billion, and 47 additional projects are under construction with investments exceeding MEX\$71 billion. Authorities also plan to tender 77 further projects, representing an estimated MEX\$95 billion and a potential historic expansion of the national grid. The rollout prioritizes high-demand regions such as Bajío and Monterrey, as well as key tourism and agricultural areas, reinforcing the role of electricity infrastructure as a key enabler of industrial development and regional growth.

U.S. Accusations Against Sinaloa Officials. U.S. authorities accused Sinaloa Gov. Rubén Rocha Moya and several other Sinaloa officials of alleged links to the Sinaloa Cartel and requested their extradition on drug

trafficking and related charges. The Mexican government confirmed receipt of the requests but stated that no sufficient evidence has been provided, and the case will be reviewed by domestic authorities. The development has heightened bilateral tensions and may complicate ongoing cooperation on security and law enforcement between both countries.

Congressional Report

Electoral Reform Achieves Constitutional Status. President Sheinbaum announced that the government's "Plan B" electoral reform has reached constitutional status after being approved by 20 state legislatures and formally published in the *Official Federal Gazette* (DOF) on April 23, 2026. The reform introduces structural changes under principles of austerity and transparency, including the prohibition of reelection and nepotism, reductions in funding for Mexico's Senate and local congresses, and a decrease in the number of municipal councilors. It also eliminates certain public benefits and reduces salaries and compensation for electoral authorities, reflecting a broader institutional redesign aimed at lowering political system costs and strengthening equity in representation.

Roberto Velasco Confirmed as Mexico's Foreign Minister. Roberto Velasco Álvarez was sworn in as Mexico's new secretary of foreign affairs after being ratified by the Senate with 81 votes in favor and 30 against, following his nomination by President Sheinbaum. Given his prior role as undersecretary for North America, his appointment signals continuity in Mexico's foreign policy and comes amid opposition concerns regarding the government's position on international human rights engagement.

Executive Branch

President Sheinbaum Participates in Progressive Leaders' Summit. President Sheinbaum marks her first high-level visit to Europe by participating in the Progressive Leaders' Summit held in Barcelona, Spain, renewing efforts to reposition Mexico internationally. During her discussion, President Sheinbaum emphasized the importance of recognizing the role of Indigenous peoples in national identity and called for a stronger global commitment to social justice, multilateral cooperation and sustainable development. She also highlighted proposals discussed at the summit, including reallocating a portion of global military spending toward environmental initiatives. On the sidelines, the visit contributed to reactivating high-level dialogue with Spain and advancing a broader agenda of cooperation among progressive governments.

Government Reduces Payment Commissions in Fuel Sector to Contain Inflation. President Sheinbaum announced an agreement with the banking sector to temporarily reduce commissions on fuel payments made with cards and vouchers as part of efforts to contain inflation. The measure includes discounts of up to 80 percent on interchange fees, lowering operational costs for gas stations and enabling these savings to be reflected in consumer prices. Taking effect from May to October 2026, the policy is part of a broader strategy to stabilize fuel prices without imposing direct price controls.

New Regulatory Framework for Energy Storage and Independent Power Producer Migration. Mexico published new regulatory provisions in the DOF establishing a comprehensive framework for the integration of energy storage systems into the National Electric System (SEN), providing long-awaited regulatory clarity for their participation in both the grid and the wholesale electricity market. The framework defines operational modalities, technical requirements and potential roles for storage – whether integrated with generation, operating independently or supporting grid reliability – while also granting a central role to system operator National Center for Energy Control (CENACE) in determining system needs and operational parameters. In addition, the Ministry of Energy issued guidelines enabling the voluntary migration of legacy independent power producer permits to the

new electricity market regime, allowing projects to transition into updated regulatory structures or contractual schemes with the Federal Electricity Commission (CFE). Together, these measures represent a significant step toward modernizing Mexico's electricity sector, improving system reliability and facilitating the integration of new technologies.

Mexico Backs Potential Candidacy for United Nations Secretary-General. President Sheinbaum confirmed that Mexico, alongside Brazil and Chile, supports the potential candidacy of Michelle Bachelet for Secretary-General of the United Nations, highlighting her international experience and leadership profile. She noted, however, that no budget has been allocated to support the candidacy, and any financial backing would be evaluated and subject to government approval.

Petróleos Mexicanos (Pemex) Launches Oil Advisory Commission. Pemex held the first session of its newly created Oil Advisory Commission, chaired by Cuauhtémoc Cárdenas, as part of efforts to strengthen strategic analysis within the hydrocarbons sector. The commission brings together a group of experts to assess national and international industry trends and provide recommendations to support decision-making within the company. The initiative reflects a broader push to reinforce long-term planning and policy alignment in Mexico's energy sector, particularly in relation to the role of Pemex in national development.

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