

Public Affairs Chatter

December 2, 2025

Gertz Out, Godoy In: A Neatly Botched Transition

In the end, Alejandro Gertz Manero's long-rumored forced resignation came quickly and quietly, officially framed as a prelude to a diplomatic assignment. In the Senate, the process unfolded with little drama: 74 votes in favor, 22 against. Case closed. Or so it seems. But the replacement was carefully chosen, as to be expected for such a key role. Gertz, clearly following Presidential orders, appointed key Sheinbaum ally Ernestina Godoy to head the Special Prosecutor's Office for Competition Control (FECOC) just hours before his departure. The statute did the rest. By legal default, Godoy now sits at the helm of the Attorney General's office (FGR) in an interim fashion.

Godoy wasted no time assuming the tone of the office. Ethics, justice, loyalty to the people, language designed to reassure Morena's base while signaling institutional continuity. President Sheinbaum offered her full-throated support, calling her "extraordinary" and "principled". The message was clear, in case there were any doubts: Godoy is the chosen one.

The succession now enters a tightly choreographed process. Forty-three people registered for the public contest, including only six women. Starting December 2, the Senate's political leadership will narrow that list to ten candidates, requiring a two-thirds supermajority. The president will then cut the shortlist to three, and the Senate will again vote by supermajority to select the next AG.

Who is Ernestina Godoy? Once a senator, then a controversial local prosecutor, and more recently the chief legal adviser to the office of the president, her political trajectory has been anything but linear. She failed to secure enough votes for reappointment in Mexico City, a setback that paradoxically accelerated her rise.

The appointment of Ernestina Godoy, Sheinbaum's most trusted legal ally, completes a puzzle that was missing a key piece. This is no longer an inherited security apparatus under someone not to be trusted: it is Sheinbaum's own. With Omar García Harfuch at Security, Omar Reyes Colmenares at the Financial Intelligence Unit, and now Godoy at the helm of the FGR, the architecture is locked in. Harfuch contains, the UIF traces and disrupts financial flows, and the FGR investigates and prosecutes. But the deeper shift lies elsewhere: the quiet recalibration of power with the Supreme Court and the broader judiciary. Godoy's arrival doesn't just restore prosecutorial coherence: it synchronizes a system that had long been operating in silos. For the first time in years, Security, the UIF, the Prosecutor's Office, and the Court appear to be aligning under a unified strategic logic. Internally, the message is unmistakable.

There was no shortage of people celebrating Gertz's departure, given his numerous, long-running conflicts with senior figures in the past and current government, and private sector. At the top of that list was Julio Scherer, AMLO's former chief legal adviser during his early years in office and reportedly close to Sheinbaum, who has been in a long-running and bitter feud with Gertz. In an article in *Proceso*, the Scherers, father and son, argued Gertz turned justice into a tool of intimidation, pursuing private

vendettas under the cover of public authority. They say those targeted, including themselves, endured baseless accusations, leaks, and abuse of power. Gertz, they argue, leaves as a symbol of what must not return. His departure, they conclude, offers a chance to rebuild the Fiscalía, restore trust, and end an era in which justice served the resentments of a single man. We shall see.

Water, Power and Political Currents: Mexico's Reform Meets Resistance

Mexico's long-delayed General Water Law has finally reached Congress. Framed as a bold move to dismantle the "black market of concessions" and reclaim national control over an increasingly scarce resource, the proposal has galvanized political allies, alarmed opponents, and helped sparked the largest multi-state protest of the year.

At the bill's unveiling, Conagua head Efraín Morales claimed it would dismantle "decades of legal grey zones and private hoarding", while President Sheinbaum pointed the finger directly at "those clinging to privilege" in a system historically shaped by informal titles and political cronyism. The proposed law, say its backers, empowers the state without crossing into privatization or commodification. It also introduces stricter controls on irrigation efficiency and seeks to recover unused volumes for federal redistribution.

Critics, however, see a different picture. The PRI and PAN quickly raised concerns over sweeping enforcement powers and the risk of discretionary sanctions. Think-tank IMCO flagged what it described as an unhealthy centralization of authority. Meanwhile, in the countryside, the reaction was anything but technocratic: 22 highway blockades in 11 states, coordinated by farmers and truck drivers accusing the government of overreach, criminalization of customary use, and a lack of meaningful consultation.

Following weeks of negotiations among federal authorities, lawmakers, and protest leaders, the government introduced substantial revisions to the proposed bill. The revised bill, now reflecting over 50 key amendments, is expected to be voted this week. Of the 124 articles reviewed, lawmakers redefined critical concepts, such as "reassignment" and "family agricultural use", and eliminated the contested notion of "hydric security" as a mechanism for volume reductions. Other adjustments clarify concession procedures, strengthen internal oversight, and establish faster, more transparent protocols for succession rights, responding directly to demands for legal certainty around inherited water use. Farmers will now be able to transmit water rights alongside land titles, with Conagua required to issue new concession documents within 20 working days.

Beyond agriculture, the beverage and bottling industry has emerged as one of the more potentially exposed sectors under the new framework. Columnists in *El Financiero*, *Reforma* and *Expansión*, no doubt influenced by the powerful soft drink and beer lobby, warned that the original draft threatened to weaken the legal certainty around long-term concessions that underpin multi-billion-peso investments by soft-drink bottlers and brewers such as Coca-Cola FEMSA, Pepsi, Heineken and Grupo Modelo. Although the revised bill removes the most controversial triggers for forced volume reductions, industry groups still fear that broader discretionary powers, especially around monitoring "inefficient use" and potential reassignments, could raise operational risk and complicate plant-level planning. That said,

Mexico's soft drinks and beer companies are so profitable that companies have little option but to keep investing, notwithstanding the added uncertainty the water bill adds.

From Blacklist to VIP Guest List: FIL Guadalajara's Political Makeover

Not long ago, the Guadalajara International Book Fair (FIL) faced open condemnation: then-President Andrés Manuel López Obrador described it as a "conclave of the right," while the governor of Jalisco sent protestors to disrupt the event.

Today, the cast has changed. López Obrador has retired to his ranch and released a new book that has marked his return to the political stage (not surprisingly, he won't be presenting it at the fair). In contrast, the current administration under Claudia Sheinbaum opted not for exclusion but mild rapprochement, sending the Secretary of Economy, Marcelo Ebrard, rather than Culture, to inaugurate the 2025 edition as a subtle gesture.

The FIL, hailed as the most important publishing event in the Spanish-speaking world, opened its 39th edition with a symbolic first: the "Made in Mexico" certification, awarded by Mr. Ebrard. Framed as a tribute to cultural value and global reach, the distinction was presented as a gesture of federal recognition to a project long celebrated abroad but politically sidelined at home. Ebrard described the FIL as a reflection of "perseverance, excellence and commitment", language that subtly reframes past tensions.

Against this backdrop, the FIL turned into a platform for the country's judicial elite. Two ministers (one in active duty, the other retired) presented new books, both published by the same Spanish legal house, at packed sessions. The events featured glowing tributes from peers: "a rigorous academic investigation, full of courage," they lauded. Yet the applause lacked one crucial element: genuine public scrutiny. Questions, it seemed, had no seat at the table. Instead, attendees took the floor with pointed critiques. At the session of ministers Yasmín Esquivel Mossa and Loretta Ortiz, members of the audience accused them of following the political line set by the Executive, a criticism that hung heavily in the room. In the adjacent forum, former minister Alberto Pérez Dayán was asked whether his controversial vote that enabled the judicial reform had been worth the institutional cost. His answer, predictably, was short and evasive.

AMLO's Book and Three Conditions

As for AMLO, after months of retreat at his ranch in Chiapas, he re-emerged in the national conversation. His new book, "Grandeza", is not simply a personal reflection but a political gesture. While he reiterated his familiar "I am retired" line, his message made clear that he remains a central figure in the ideological narrative of the movement he founded. This marked a new chapter in López Obrador's ongoing effort to define the ideological structure of his movement, with him at the figurative center.

In the video accompanying the book AMLO sets out **three conditions** under which he would return to political action: if he believes democracy is under threat, if Claudia Sheinbaum faces an attempted coup or political harassment, or if Mexico's sovereignty is compromised by foreign interference. As these concepts are deliberately broad, AMLO in effect gets to determine when they are being met, giving him wide discretion to re-enter politics whenever and if he chooses. Watch this space.

And just in case there is someone who does not want to read all 632 pages of AMLO's book, here is a CliffsNotes summary. In *Grandeza*, AMLO sets out to recast Mexico's origins by elevating pre-Hispanic civilizations as the country's true moral and cultural foundation. His account emphasizes harmony, balance and collective virtue, an Indigenous world portrayed as orderly and self-sustaining until the Europeans destroyed it. Some less desirable elements of ancient pre-Hispanic life, such as endless bloodshed and conflict, absolute hierarchy, coercive tribute systems, etc., receive somewhat less attention. Nonetheless, AMLO's broader message matters more than the precise historical record: recovering Indigenous heritage is central to the national project for the Mexico he envisions.

Contact:

Laura Camacho

Executive Director Miranda Public Affairs

laura.camacho@miranda-partners.com

Gilberto García

Partner and Head of Intelligence

gilberto.garcia@miranda-partners.com