

DOUBLE EAGLE ALLIANCE / ALIANZA DOS AGUILAS

# TODO EL PODER: WHAT A SHEINBAUM ADMINISTRATION MEANS FOR MEXICO AND THE UNITED STATES

WRITTEN BY  
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## KEY POINTS

- **Claudia Sheinbaum** overwhelmingly won Mexico's June 2 presidential election with promises to continue the populist project of outgoing President Andrés Manuel López Obrador (AMLO).
- **The ruling MORENA party** and its allies are projected to come close to winning supermajorities in congress, meaning constitutional amendments will likely not need opposition support.
- **Sheinbaum has outlined** few policy specifics, suggesting continuity with AMLO's agenda of expanded social programs, state-intervention in the economy and a less confrontational approach to public security.
- **The president-elect** has promised close U.S. relations with a focus on emphasis on trade, nearshoring and defending Mexicans abroad. It remains to be seen if she will pursue closer security cooperation with the United States.

## EXECUTIVE SUMMARY

Claudia Sheinbaum claimed the Mexican presidency in the July 2 election, besting opposition coalition candidate Xóchitl Gálvez by nearly 30 points on an agenda of continuing the political project of her political mentor, outgoing President Andrés Manuel López Obrador (also known as AMLO) ([El País, 2024](#)).

She captured more than 58% of the popular vote, besting the 53% support AMLO received in 2018—the most for a presidential candidate since 1976, when single-party rule under the Institutional Revolutionary Party (PRI) dominated Mexico and the conservative National Action Party (PAN) failed to run a candidate ([Arroyo, 2024](#)).

Sheinbaum, 61, promoted her victory as historic—though her coalition name, Together Let's Keep Making History, riffed on the name López Obrador's 2018 coalition—as she becomes Mexico's first female president.

Women capturing the nominations of Mexico's two main electoral coalitions was itself history and reflected the emergence of women in Mexican politics—the product of a 2014 political reform that mandated gender parity in party nominations and was expanded to include all public offices, spare the presidency ([Sheridan & Agren, 2023](#)). Sheinbaum also becomes Mexico's first Jewish president in what remains an overwhelmingly Catholic country, though she identifies as non-religious.

Jorge Álvarez Maynez ran third, for the small Citizen Movement (MC) party, took approximately 10% of the vote, though he drew accusations of playing the pro-government spoiler role as he targeted Gálvez and the three parties in her coalition ([Camarena, 2024](#)).

## Relations with the United States will require repairing, too. AMLO curtailed cooperation with the Drug Enforcement Administration (DEA), while the Foreign Relations Secretariat has delayed the processing of visas for DEA agents.

For all the history being made, AMLO (as the president is known) loomed over the election, which shaped up as a referendum on his administration—the so-called, “Fourth Transformation of Mexican History.” The term aggrandizes his administration’s place in Mexican history, placing it alongside Independence, the Reform Laws of Benito Juárez, and the Revolution of 1910. Sheinbaum campaigned on “building a second level” on the Fourth Transformation, promising continuity in areas such as AMLO’s cash-stipend schemes for seniors and single mothers, state-control over the energy sector, and the “hugs, not bullets” security policy ([El Universal, 2024](#)).

MORENA and its allies in the Green Party (PVEM) and Workers’ Party (PT) also came close to capturing super majorities in both chambers of Congress, opening the possibility for a Sheinbaum administration to change the opposition with scant opposition support ([Martínez, 2024](#)). AMLO himself pushed for voters to deliver supermajorities, which would allow him to approve a suite of 20 constitutional amendments during September 2024—his last month in office as Congress is sworn in one month ahead of the new president ([García & Vallejo, 2024](#)).

Amid the history, Sheinbaum arrives in the presidency as somewhat of an unknown quantity: her political career has been tied to AMLO since the start, and she has said little during her term as Mexico City mayor from 2018–2023 to suggest a break in his politics or policies. Her campaign offered even fewer suggestions of a break with AMLO, who, along with a pro-government newspaper, groused after the first candidates’ debate that the contenders had overlooked the “accomplishments” of his administration ([Sánchez Jiménez & Urrutia, 2024](#)).

Sheinbaum takes office October 1. She inherits a country rife with challenges, starting with insecurity as drug cartels exercise control over swaths of the country and increasingly meddle in the political process. At least 30 candidates and potential candidates were killed ahead of the 2024 election, with drug cartels accused in many cases ([Animal Político, 2024](#)).

Mexico has registered more than 180,000 homicides since AMLO took office in December 2018, as he pursued a security policy of “hugs, not bullets” ([Vela, 2024](#)). Drug cartel conflicts roared throughout his time in office and encroached on previously placid states, such as Chiapas. Crimes like extortion remain rife, while drug cartels increasingly focus on activities such as trafficking migrants through Mexico, according to security analysts.

Relations with the United States will require repairing, too. AMLO curtailed cooperation with the Drug Enforcement Administration (DEA), while the Foreign Relations Secretariat has delayed the processing of visas for DEA agents ([José Díaz Briseño, 2024](#)). Fentanyl remains a sensitive issue as Mexican cartels import Chinese chemical precursors and make the synthetic drug in clandestine labs for export ([Galdos, 2023](#)).

Transmigration through Mexico continues at robust levels, especially as migrants arrive from further afield than the traditional outflow countries of Central America’s northern triangle ([WOLA, 2024](#)).

Trade disputes remain a serious issue. AMLO slow-rolled USMCA disputes over Mexico discriminating against U.S. and Canadian investors in clean energy projects, as sources alleged. ([Associated Press, 2022](#)). The USMCA trade agreement is up for review in 2026. The renewal comes amid sensitivities over mushrooming Chinese exports to Mexico and the growing presence in Mexico of Chinese manufacturers taking advantage of USMCA rules for accessing the U.S. market ([Grant, 2024](#)).

Signs of democratic decline have occurred on AMLO’s watch. The president has attempted to

undermine counterweights such as the country's courts and autonomous institutions—including the electoral institute and transparency institute—while threatening critical journalists and civil society organizations (Agren, 2022b). Sheinbaum has endorsed all of AMLO's proposed reforms for undermining autonomous agencies, the courts, and the electoral institute, saying that the latter "doesn't guarantee democracy" (Arista, 2024a).

Sheinbaum will have to cooperate with Mexico's military, which has traditionally stayed out of politics, but has increased its budget and influence under AMLO (O'Grady, 2021). AMLO has tasked the military with everything from building and managing railways and airports to handling public security.

AMLO initially implemented severe austerity measures upon taking office. He spent less than 1% of GDP on COVID relief, slashed bureaucracies, and famously sold the presidential aircraft, which he used as a populist trope for the supposed profligacy of his predecessors (Associated Press, 2023b). However, AMLO drastically increased spending on social programs ahead of the 2024 election, thus leaving Sheinbaum to deal with a record deficit (Suárez, 2024).

Sheinbaum also inherits the promise of nearshoring, in which companies move supply chains from China to locales closer to the U.S. market. Nascent signs of nearshoring are appearing in booming cities such as Monterrey as investment—mainly from Asia—pours in (Murray, 2023). Regardless, it remains a mirage for many business analysts, as it risks being undermined by a climate of investment uncertainty, rule of law concerns, insecurity, and a shortage of electricity under AMLO's nationalistic energy policies (IMCO, 2023).

This TPPF report, drawn on from investigative work over the past five years from Mexico City, recounts the impact of the López Obrador administration on Mexico, the U.S.-Mexico relationship, and the Texas-Mexico relationship. It looks forward to the challenges and opportunities for the Sheinbaum administration

## The new president assumes office at a time of promise for Mexico. Nearshoring, in which companies relocate supply chains and operations closer to the U.S. market for commercial and geopolitical reasons, appears likely to favor Mexico.

and how it will manage relations with the United States and Texas.

### SHEINBAUM AS CDMX MAYOR

An environmental engineer by training, Sheinbaum entered politics at AMLO's invitation in 2000. She served as Mexico City's environment secretary under his 2000-2005 mayoral administration, where she was responsible for the construction of elevated freeways (Vanguardia, 2018). In 2015, she became borough chief in the Tlalpan district of the national capital and later served as the mayor of Mexico City from 2018 to 2023.

Previously, she was a student activist at the National Autonomous University of Mexico (UNAM), where she worked as a climate scientist. Her career has been closely tied to López Obrador since the start. She has shown few signs of straying from the president's policies, while her comments as mayor and candidate often echoed the president's statements from his daily press conference.

"She's strategically ambiguous and knows that her main constraint is the president's agenda," Raúl Zepeda Gil, a Mexican scholar at Oxford University, said in an interview prior to the campaign. "The average MORENA voter," referring to the ruling party founded by AMLO, "has such a strong relationship with the president that if they feel she's betraying the president by saying new or differing ideas, it would erode her vote."

Sheinbaum's team boasts of numerous achievements in the capital, starting with more urban mobility through cable cars connecting neighborhoods in

the outer boroughs (Cullell, 2021). She ran a competent COVID vaccination program, according to her campaign team. Sheinbaum also speaks of improved public security, with the homicide rate and incidents of serious crimes falling by more than 50% (Quintero, 2023).

Critics point to Mexico City recording high excess mortality rates during the pandemic, something Mexican health officials attribute to a high portion of the population already suffering from COVID comorbidities (Sheridan, 2020). Researchers tracking excess mortality say that capital officials impeded their access to death certificates, despite the Sheinbaum administration's boasts of digitizing government to reduce bureaucratic red tape (Sheridan, 2021; Bloomberg Cities Network, 2023).

The Mexico City Metro fell into a state of disrepair as maintenance was postponed amid austerity measures. An elevated portion of Línea 12, the flagship public works project of former mayor Marcelo Ebrard, collapsed in 2021, claiming 26 lives (Rojas, 2024a). Sheinbaum's campaign says an outside investigation showed construction negligence. She rejected the investigators' conclusions that poor maintenance contributed to the collapse as "biased and false" (Sheridan, 2024).

### *Losing Political Control of the Capital*

Línea 12 collapse proved especially embarrassing for AMLO: politicians aligned with him have governed the capital since 2000. The Metro, which carries 3 million passengers daily across the capital, suffered frequent service stoppages during Sheinbaum's administration (Arana, 2024a). A January 2023 collision between trains left one passenger dead and more than 50 injured (Infobae, 2023). Sheinbaum later alleged that sabotage was occurring in the metro, with AMLO subsequently sending 6,000 National Guard members into the metro (Presidencia de la República, 2023). "AMLO rescued her from all her problems in Mexico City," Ilán Semo, historian at the Iberoamerican University, said of the pattern shown by the Metro incident. "Now she has to do it on her own."

Sheinbaum often describes the capital as "the city of rights," in a nod to its approval of measures such as abortion decriminalization in 2007 and the legalization of same-sex marriage several years later (Jefatura del Gobierno, 2020). Mexico City residents see themselves as being in opposition to the federal government rather than progressive—as Sheinbaum has suggested—preferring leaders who confront the sitting president. Sheinbaum's closeness to AMLO and her consistent deference toward him likely cost her in the 2021 midterms, when the PAN-PRI-PRD coalition swept half the borough governments.

"It's populists versus cosmopolitans," political science professor Federico Estévez of the Autonomous Technological Institute of Mexico said in a 2021 interview of the post-election cleavage in the capital. AMLO later grouched that the capital had become more "conservative," a label he uses for his political opponents, even though the same people voting against MORENA in 2021 had elected him in 2018 (Escobar, 2024).

### **LACKING POLITICAL SAVVY?**

In interviews, political analysts describe Sheinbaum as holding technocratic tendencies, but lacking political savvy. She opted for several younger collaborators with technical chops upon assuming the Mexico City mayor's office—only to have more doctrinaire partisans pushed upon her after the midterms, according to the analysts. They point to her being unable to push her preferred successor as the MORENA candidate—public security secretary Omar García Harfuch—in the capital, with Clara Brugada, borough chief in the Iztapalapa borough, being nominated instead.

"Sheinbaum is a person of few political skills. If she were seen as someone politically savvy, she would have represented a threat to the continuity of López Obrador's political project," says an academic with MORENA sympathies. "A lot now will depend on her political team helping her, not technocrats."

The academic source pointed to a lack of personal corruption scandals working in Sheinbaum's favor,

along with no stories surfacing of undeclared properties or luxuries. Sheinbaum leaned into the same personal austerity politics of AMLO, even replicating his pleas of personal poverty—a common populist trope throughout his administration, when he would show his empty pockets and a wallet with little money or credit cards—by claiming in a debate that she only rented a modest apartment (N+, 2024). The claim drew ridicule from Gálvez, who said on the stump of Sheinbaum, “if you haven’t been able to accumulate a patrimony by age 60, you’re a fool” (Raziel, 2024).

## CDMX SECURITY MIRACLE?

As Sheinbaum prepared for her presidential run, she spoke of public security as her top accomplishment in Mexico City. She pointed to an eye-popping 51% drop in the homicide rate during her administration. Independent media expressed skepticism, however. A factcheck from news outlet Animal Político showed that Mexico City officials between 2019 and 2022 increasingly classified violent deaths as “events of undetermined intention” rather than homicide, causing the homicide rate to drop (Maza, 2023).

The local prosecutor’s office—which is autonomous—oversaw a 99.1% impunity rate for all crimes in Mexico City—the highest rate in the country—according to think tank México Evalúa. Sheinbaum has promoted former prosecutor, Ernestina Godoy, as a key member of her security team (México Evalúa, 2024).

### Competent Security Staff

Supporters say Sheinbaum promoted a well-thought-out security strategy while in office. Writing for the newspaper *Reforma*, Carlos Pérez Ricart, a professor at the Center for Research and Teaching in Economics (CIDE), described outlined the three pillars of Sheinbaum’s security strategy in Mexico City: close coordination between police and prosecutors, giving police investigative powers, and implementing prevention programs (Pérez Ricart, 2024).

*The Economist* highlighted a focused deterrence program in an especially difficult neighborhood—involving police intelligence, coordination with the prosecutor’s office and social services—which drove

down the homicide rate from 22 per 100,000 to 9 per 100,000 between 2018 and 2023 (*The Economist*, 2024a).

“There are signs they have been more methodical about approaching insecurity in the city,” Falko Ernst, senior Mexico analyst with the International Crisis Group, told *The Globe and Mail*. (Agren, 2024a). He described Sheinbaum as bringing in serious people with criminology backgrounds, who take a more “technocratic” approach to public security.

Sheinbaum has spoken often in her campaign of increasing “coordination” between police and prosecutors, along with providing police with investigative powers—something usually reserved for prosecutors—and continuing AMLO’s daily convening of a “security cabinet” (Contreras Camero, 2024). She is likely to appoint her former public security García Harfuch—who survived a brazen assassination 2021 attempt in an upscale neighborhood blamed on the Jalisco New Generation Cartel—to a senior security post, according to press reports (*El Financiero*, 2024).

It remains to be seen if Sheinbaum’s Mexico City experience can be replicated on the federal level. Mexico City boasts the largest police force in the country with 90,000 officers in a city of approximately 9 million people (Martinez, 2024). Most states have much smaller forces. AMLO also prioritized the military during his administration (while conversely neglecting police forces), putting soldiers at the center of his security approach.

## BREAKING FROM ABRAZOS, NO BALAZOS?

In 2018, AMLO won his office on the security strategy of “hugs, not bullets,” which would address what he considered the root causes of crime: corruption and poverty. The phrase proved little more than a campaign slogan, however. He promoted a program called “Jóvenes construyendo el future” (Youth building the Future), which promoted job training for out-of-work Mexicans—typically young men who were of a certain age that was normally targeted by drug cartels for recruitment.

“It has hardly improved the employment prospects for the most deprived youth and has instead resulted in the recruitment primarily of women with high-school degrees,” Raul Zepeda Gil wrote in his research on youth entering drug cartels ([Zepeda Gil, 2024](#)). He found that young men “working in precarious conditions,” rather than idle individuals, were recruited by drug cartels.

Observers say drug cartels have largely interpreted the president’s security policy as a license to act freely. “Government, the authorities, have been soft and narcotics traffickers are not soft,” Bishop Salvador Rangel, then-head of the diocese of Chilpancingo-Chilapa, said in a 2022 interview with Catholic News Service ([Agren, 2022c](#)). “They go about their business and all that they do, and I think they’re taking advantage of this kindness from the government,” he commented. The bishop is known for seeking dialogue with drug cartel bosses in southern Guerrero state. He added in an April 1 interview, “I’m in favor of ‘hugs, not bullets’ on principle. But what I’m not in agreement with is the way groups of sicarios and drug cartels are abusing this.”

Four bishops in Guerrero state—previously Mexico’s heroin-producing heartland—helped broker a peace pact between three drug cartels in the state in early 2024. Rangel said the pact was holding and was done to diminish violence. For his part, AMLO expressed approval for the accords. “I think we all have to contribute to peace,” he said ([Cortés Martínez, 2024](#)).

### ***Campaigning on Diminished Insecurity Under AMLO***

Sheinbaum has never disavowed “hugs, not bullets,” though she didn’t campaign on it either. She did, however, campaign on the premise that violence had diminished under AMLO’s administration. While Sheinbaum joined her two rival candidates in signing onto a plan that was presented by the Mexican bishops’ conference and Jesuits’ Mexico province that sought to pacify Mexico, she told the plan’s authors at the March ceremony, “I don’t share the pessimistic evaluation of the present moment” ([Agren, 2024b](#)).

The document was drafted from the feedback received in a series of peace forums held by the Catholic Church and the Jesuits after the June 2022 murders of two elderly Jesuit priests at the hands of a known crime boss as the priests sheltered a man chased into their parish ([Agren, 2022d](#)). The Jesuits and multiple bishops called on AMLO to reconsider his “hugs, not bullets” security strategy—“There aren’t enough hugs to cover the bullets,” the celebrant said at the priests’ funeral Mass—drawing a sharp rebuke from the president ([El Universal, 2022](#)).

The Jesuit who organized the peace forums, Father Jorge Atilano, said in an interview, “There are situations that can’t be denied, such as the social fracturing, the environmental deterioration, the institutional debilitations.” He continued, “Homicides have been reduced [under AMLO], according to the statistics. But disappearances have increased. We also have more [cartel] control. That could explain why there’s a reduction in homicides: if you have more territory under control, there’s no longer any need to commit homicides to maintain control.”

### **NARCO ELECTIONS**

As organized crime expands its territorial control in Mexico, drug cartels have moved into the electoral process. Eduardo Guerrero, a Mexican security consultant and director of Lantia Consultores, a consultancy, points to two examples over the past 15 years when organized crime mobilized the vote. In 2011, La Familia Michoacana mobilized for the PRI in Michoacán state, defeating the PAN candidate Luisa María Calderón, the then-president’s sister. In 2021, the Sinaloa Cartel kidnapped PRI operators in Sinaloa state and released them only after polls closed and MORENA swept the state ([Hernández López, 2021](#)). “This problem has been exacerbated during López Obrador’s administration because there’s a federal government policy of not directly confronting criminal groups,” Guerrero said in an April 29 presentation. “This causes the expansion of criminal groups into new areas and to colonize these areas and control them,” he added ([Save Democracy, 2024](#)).

The 2024 elections unfolded as the most violent in the history of modern Mexico. In a May report, Integralia



Consultores had counted 560 acts of political violence during the 2024 election cycle—87% more than the 2021 midterm election cycle. At least 30 candidates or potential candidates—mostly on the municipal level—were murdered ([Eje Central, 2024](#)).

“Organized crime realizes that if it has candidates and next mayors or municipal officials that it will be able to consolidate its territorial control, making extortion more efficient and obviously being able to participate in many other businesses,” Guerrero said.

### **#NARCOPRESIDENTE Accusations**

Accusations of drug cartel financing rocked Mexico in January, when ProPublica published an exposé alleging that drug traffickers funneled \$2 million into AMLO’s unsuccessful 2006 campaign ([Golden, 2024](#)). AMLO, who has never had a cross word for drug cartels during his administration and even greeted the mother of imprisoned cartel kingpin Joaquín “El Chapo” Guzmán, vehemently denied the story and demanded an apology from the Biden administration, which had nothing to do with the story ([Miller, 2024](#)). Ken Salazar, the U.S. Ambassador to Mexico, described the matter as “case closed” in an effort to assuage AMLO ([Aristegui Noticias, 2024a](#)).

The hashtag #narcopresidente (“narco-president”) subsequently trended on social media for weeks after the ProPublica exposé, drawing angry responses from AMLO ([Escobar, 2024](#)). The hashtag #narcocandidata (“narco-candidate”) trended for Sheinbaum, despite there being no evidence cartel connections. With the hashtags trending, AMLO proactively doxed a *New York Times* reporter for a story on U.S. officials examining possible links between his confidants and drug cartels—investigations which were not pursued ([Feuer & Kitroeff, 2024](#)).

### **COMMITMENT TO DEMOCRACY**

The incursion of drug cartels into Mexico politics comes as the country suffers a democratic erosion under AMLO. The populist president has routinely railed against the country’s supreme court for ruling against his initiatives, such as attempting to put the National Guard under military command (despite the constitution stating it must have civilian leadership)

and granting injunctions which would have stopped construction on pet projects such as railways and airports ([Arista, 2023b](#)). AMLO has blasted the country’s autonomous institutions, such as the National Electoral Institute (INE), transparency institute, and competition commission, as a “neoliberal” waste of money ([AMLO, 2024](#)).

Mass protests from civil society groups filled the Zócalo in central Mexico City four times in 2022 and 2023, occupying an iconic square to demand the electoral institute not be dismantled ([BBC, 2023](#)). AMLO responded by erecting barricades around the National Palace and lowered the massive Mexican flag that was flying over Zócalo. Lowering the flag sent an unmistakable message to protesters on who the president considers “*pueblo*” (the people) and who he doesn’t, according to people participating in the demonstrations. A court ordered that the flag be raised for a May 19 pro-democracy demonstration in the Zócalo, in turn prompting AMLO to say, “The flag belongs to everyone, even traitors to the country” ([Morales & Villa y Caña, 2024](#)).

### **Opposition Politics Alive in Capital**

Sheinbaum has also taken a critical view of the pro-democracy protests. Diana Alarcón, a Sheinbaum campaign spokeswoman, pointed to opposition gains in Mexico City in 2021 as proof of democracy thriving in Mexico. However, in an interview, she echoed AMLO’s criticisms of the INE, which convenes elections and referees partisan political activity, saying Sheinbaum wants a less-expensive INE with a slimmed-down bureaucracy.

Much of the antipathy felt toward the INE originated around the 2006 election, where AMLO lost to Felipe Calderón by less than a percentage point. AMLO cried fraud (even though the country’s electoral tribunal rejected his claims of irregularities) and shut down central Mexico City with a six-week protest camp ([Roig-Franzia, 2006](#)). Alarcón said in an interview that Sheinbaum also considers the 2006 election to have been rife with irregularities.

## Attacks on the Courts

AMLO has proposed putting the election of justices at all levels, including the Supreme Court, to popular vote (Hiriart, 2024). Sheinbaum says she will continue the outgoing president's attempts to overhaul the courts, telling the *Financial Times*, "I believe in freedom. I believe in democracy. And that the people should decide" (Stott & Murray, 2024).

## THE MILITARIZATION OF MEXICO

Mexico's left has long expressed misgivings about the country's military, namely, the military's involvement in suppressing student protests ahead of the 1968 Olympics in Mexico City and its role in the 1970s "dirty war," in which troops hunted down guerrillas in states such as Guerrero. AMLO was among those calling for soldiers to return to their barracks (García, 2022). However, AMLO did an about-face after winning his election, immediately turning to the military as an ally upon taking office, tasking soldiers with everything from overseeing public security to building and managing railways and airports, to running seaports and the customs service. He called soldiers the "pueblo uniformado," or "the people in uniform," and described their officers as "incorruptible," to justify handing over power to the military (Capital 21, 2020).

Sheinbaum has followed suit, justifying turning to the military as a political ally, telling the BBC, "Calderón used the army to kill, without justice... What López Obrador is doing now, also with the army, is building peace and constructing justice with institutions. It's completely different" (Grant, 2024b).

## Army-Cartel Alliance

An investigation from the International Crisis Group contradicted Sheinbaum's claims of the army acting peacefully, however. The investigation cited sources describing soldiers partnering with local cartels and self-defense groups in Michoacán state to rebuff an incursion from the Jalisco New Generation Cartel (CJNG) (International Crisis Group, 2024). "It had become a threat—both to the government's narrative of a country at peace and local crime groups' existence," author Falko Ernst said in an X post (Ernst, 2024).

## A Hermetic Institution

The military's increased influence in AMLO's administration was on display in 2021 after the arrest in the United States of Mexico's former defense secretary, General Salvador Cienfuegos (Golden, 2022). The general was charged with drug-conspiracy charges and faced trial in a New York court. Mexico's military lobbied the AMLO administration for Cienfuegos' release. The Mexican government, in turn, pressured the U.S. government to return Cienfuegos to Mexico—which the Americans did, with then-attorney general William Barr saying he acted to preserve bilateral relations and security cooperation (U.S. Department of Justice, 2022). He received assurances that Cienfuegos would be investigated in Mexico. This would never happen, however, as the general was quickly absolved upon returning to Mexico.

## Non-Military Tasks for Soldiers

AMLO has assigned the Defense Secretariat (SEDENA) an increasing number of non-military tasks over the course of his administration and come to depend on the army and navy for carrying out his priority projects. SEDENA has built and currently operates airports in suburban Mexico City and Tulum, and will operate the Mayan Train, which circles the Yucatán Peninsula. SEDENA will receive a tourist tax from visitors arriving in Mexico to offset the costs of operating the Mayan Train and other projects. (Proceso, 2023; Animal Político, 2023). The Navy Secretariat (SEMAR) operates the Mexico City airport (Aeropuerto Internacional Ciudad de México, 2023).

Sheinbaum has stated that the military will continue to serve in security capacities, although one of her advisers, Arturo Zaldivar, who is a former Supreme Court President who resigned from the court to join her campaign and advises on security matters, told Bloomberg, "We'd maybe have to re-calculate the role these institutions have [in building infrastructure.] It was important for them to intervene, and we'll have to see if there's reason for them to stay" (Navarro, 2024).

## Preserving AMLO's Legacy

AMLO has often railed against what he calls “the neoliberal period,” referring to the mid-1980s to 2018, when a series of state enterprises were privatized. The president is likely betting that megaprojects (such as the Tren Maya and Felipe Ángeles International Airport) could not be privatized by future presidents, even as they lose money or require subsidies. “We have already made a decision to shield these projects, because, knock on wood, if the corrupt neoliberals return, they will want to privatize what they could not previously or did not have the time to hand over [to cronies],” AMLO said in 2021 ([Aristegui Noticias, 2021](#)).

## Poor Security Results

Bloomberg noted in its feature story on Mexico’s military that AMLO’s administration “has presided over the bloodiest term in the nation’s recent history,” even though the combined budgets of the armed forces were “boosted by 150 percent.”

AMLO began his time in office by creating a new militarized police force known as the National Guard, which would be an amalgam of the military police and members of the Federal Police. AMLO subsequently dissolved the Federal Police, alleging that it was irredeemably corrupt, as it had been founded under Calderón and overseen by then-Public Security Secretary Genaro García Luna, who was found guilty in a U.S. court last year of taking bribes from the Sinaloa Cartel ([United States Attorney’s Office, Eastern District of New York, 2023](#)).

The newly formed National Guard made one of its first deployments in 2019 to stem the flow of migrants through Mexico after then-President Donald Trump threatened to escalate tariffs if Mexico didn’t act on the migration issue ([Plazas, 2019](#)). The National Guard proved to be ineffective in its early years and is still struggling to rebuild its crime-fighting and investigative capacities that were lost when the Federal Police was disbanded. “The number of people who have been detained as a result of intelligence work is vanishingly small,” Samuel Storr, a security researcher at the Iberoamerican University,

told the *Financial Times* ([Agren, 2022e](#)). He added, “It’s not really capable of providing the role of municipal police.” Sheinbaum has repeatedly said that the National Guard would remain under SENDEA administration but be “consolidated.”

## MIGRATION

The migration issue has inflamed U.S.-Mexico relations under AMLO as a torrent of migrants streamed through Mexico into the United States. AMLO campaigned on a pledge of “not doing the dirty work” of any foreign government and promised to provide opportunities for migrants wanting to work in Mexico ([Agren & Gomez, 2019](#)). He initially issued humanitarian visas, which drew large numbers to Mexico’s southern border. It was quickly reversed as many of the migrants showed no interest in staying in Mexico ([Agren & Gomez, 2019](#)).

AMLO also began showing a willingness to deal with U.S. officials. He agreed to the terms of the “Remain in Mexico” program, in which migrants stayed on the Mexican side of the border while their cases wound their way through U.S. courts ([Partlow and Miroff, 2024](#)).

He also buckled to Trump’s demands that Mexico step up enforcement or face escalating tariffs ([The Economist, 2019](#)). AMLO and Trump reached an arrangement for their working relationship: AMLO would focus on migration, while Trump would stay out of Mexican matters, such as security and human rights. AMLO appears to have successfully pushed President Joe Biden in that same direction: Mexico acts as a migration enforcer, while the United States stays silent on Mexican matters.

Mexico has increased its migration detentions in 2024—or at least attempted to keep migrants away from its northern border—with illegal crossing dropping by 50% in May, when compared with December 2023, according to U.S. Customs and Border Protection. ([Montoya-Galvez, 2024](#)). According to migrants, migrant advocates, and news reports, Mexico has undertaken a scheme of detaining migrants near the U.S.-Mexico border and busing them to southern Mexico ([Romero, 2024](#)). Mexico’s ostensible goal is to

dissuade migrants from trying to reach the United States, but advocates say most people simply head north again.

### ***Defending Mexican Migrants***

Xóchitl Gálvez, candidate for a three-party opposition coalition squaring off against Sheinbaum, spoke during her campaign of protecting the migrants crossing Mexico, where they are often preyed upon by corrupt police and drug cartels (Meza, 2024). Sheinbaum spoke more often of migrants already living in the United States and providing them protection through its network of consulates. She discussed the Mexican diaspora in economic terms, noting the economic importance of the \$60 billion in remittances sent home annually (Li Ng, 2024). Sheinbaum told the BBC, “We’re always going to defend Mexicans, the Mexicans in the United States, Mexicans in Mexico or wherever they are” (Grant, 2024). She has adopted an AMLO line in response to a question on the heated language on immigration coming from U.S. politicians: “There’s going to be a lot of campaign rhetoric in the U.S. [election] campaign. We always have to defend our country, our sovereignty.”

### ***International Development to Slow Migration***

AMLO came to office promoting the idea that development in Central America could stem migration by addressing the root causes of poverty and violence. AMLO immediately exported an unproven tree-planting scheme he had unveiled at home called “Sembrando Vida” (Sowing Life), which paid small farmers to plant and care for trees. He also insisted that the United States fund it, bitterly complaining that the Biden administration spent money elsewhere, including Ukraine (Aristegui Noticias, 2024b).

Investigative reporters showed that the program, along with “Jovenes construyendo el futuro,” largely failed in Central America with much of the funding not appearing in government coffers (Expansión Política, 2023). AMLO later insisted that the United States address the migration issue by lifting the embargo on Cuba and sanctions on Venezuela (Secretaría de Relaciones Exteriores, 2023).

### ***Migrants Staying in Southern Mexico***

AMLO often said migrants could apply for visas that would allow them to work in Mexico’s southern states (López, 2024). Migrants said in interviews that they didn’t want to work in southern Mexico because salaries were little better than what they could earn at home. Mexico was also notoriously insecure for migrants, they said. Sheinbaum recycled those ideas during her campaign, announcing plans to industrialize Tapachula, a city near the Guatemala border teeming with migrants waiting for documents to transit Mexico. “Migrants go to the United States to work because they don’t have opportunities at home, the southern border is going to serve to employ a considerable percentage of migrants,” she said while campaigning (Corona, 2024).

### ***The “Internalization” of Migration***

The operators of Catholic-run migrant shelters in Tijuana and the Sonora side of its border with Arizona have said in interviews that most of their guests are Mexican asylum seekers fleeing drug-cartel violence in states such as Michoacán, Guerrero, and Chiapas. Migrants from other countries, they said, often headed straight for the border with the goal of turning themselves in to Border Patrol.

Much of the migration in past years involved Mexicans and citizens of the Northern Triangle of Central America (Guatemala, Honduras and El Salvador) who fled poverty and gang violence (Agren, 2020a). Data on detentions from U.S. Customs and Border Enforcement show an “internationalization” of migration with migrants arriving from Nicaragua, South America, and further afield, with many arriving visa-free in South America and transiting the Darién Gap, the thick jungle separating Colombia and Panama (The Guardian, 2024).

This “internationalization” of migration presents a host of challenges for Sheinbaum administration as it promotes a policy of development to slow migration.

## A COMPLICATED U.S.–MEXICO RELATIONSHIP

Migration matters have complicated the U.S.–Mexico relationship for years but came to the fore after Trump took office in 2017. Trump focused on trade by forcing a renegotiation of the North American Free Trade Agreement (NAFTA)—no small matter in Mexico, which has oriented its geopolitics and export-driven economy toward the United States (Agren, 2017).

Trump found similarities with AMLO, with the latter penning a seven-page letter to Trump after winning the Mexican vote in July 2018, stating, “We managed to put our voters and citizens at the center and displace the establishment or predominant regime” (López Obrador, 2018). After the new USMCA trade agreement (which replaced NAFTA) was signed with AMLO’s approval, Trump demanded action on migration and threatened tariffs. Once AMLO agreed to act, the two presidents appeared to develop an understanding: AMLO would act on migration, while Trump would not intervene in Mexican matters.

AMLO showed signs at the time of the 2020 election of preferring a Trump presidency. He waited to congratulate Biden, he took Trump’s claims of election fraud seriously (citing his own experience in 2006), and he refrained from offering negative comments on the events of January 6, 2021 (Agren, 2020b).

### *Is the U.S. Ambassador Appeasing AMLO?*

Biden pursued a broader agenda with Mexico. He focused on climate change, sending Climate Envoy John Kerry to Mexico on multiple occasions (U.S. Department of State, 2022). Commercial tensions heated up as the United States and Canada filed a USMCA complaint over the treatment of clean energy investors, which AMLO froze clean energy auctions as part of his nationalistic energy policies (Americas Quarterly, 2022). AMLO also threatened to expropriate the assets of Alabama-based Vulcan Materials, which operates a gravel quarry and port near Playa del Carmen (Reuters, 2024).

Ambassador Ken Salazar became the point person for Biden with the AMLO administration. A source familiar with Salazar’s work said, “He has a remit to get along with AMLO.” Salazar became a familiar sight entering the National Palace for visits with AMLO, but this proved controversial. The *New York Times* in July 2022 reported on Salazar’s relationship with AMLO and suggested that Salazar has shown sympathies with the president’s perspective on several issues of intense interest to AMLO, including AMLO relitigating the close 2006 election he lost and disputing the work of anti-graft group Mexicans Against Corruption and Impunity (MCCI), which has investigated the president’s family and receives USAID support (Kitroeff & Abi-Habib, 2022).

Journalist Dolia Estévez, who chronicles the U.S.–Mexico relationship, wrote in the publication *Eje Central*, “In Washington exists a consensus pushed by ambassador Ken Salazar of not publicly criticizing Mexican government policy to not provoke its mercurial president (AMLO) and jeopardize cooperation on migration and fentanyl” (Estévez, 2023).

### *Frayed Security Cooperation*

Security cooperation between Mexico and the United States frayed under AMLO. The Mexican president has repeatedly stated that fentanyl addiction does not exist in Mexico, while the country’s “ancestral values” protect it from all forms of addiction (La Prensa, 2023). The statements follow his elimination of the country’s survey on addiction, leaving no evidence for his claims. The president has even blamed the fentanyl addition on U.S. parents failing to “hug” their children (Associated Press, 2023c).

After the arrest of Cienfuegos, Mexico passed laws requiring foreign agents, including the Drug Enforcement Administration (DEA), to share any intelligence obtained—thus stripping them of their previously-held immunity (Associated Press, 2020).

AMLO bitterly complained that the DEA had infiltrated Los Chapitos—the cartel run by El Chapo’s sons, which the DEA accuses of manufacturing and exporting fentanyl—calling it “abusive interference”

## During the 2024 campaign, (Sheinbaum) questioned the DEA’s annual National Drug Threat Assessment, saying, “This is not the first time that the DEA produces a baseless report.”

(Camhaji, 2023). The AMLO administration subsequently slow-rolled visas for new DEA agents, as administrator Anne Milgram told Congress (Díaz Briseño, 2023).

Sheinbaum has followed AMLO’s dogged criticism of the DEA, while campaign surrogates have expressed skepticism, too. During the 2024 campaign, she questioned the DEA’s annual National Drug Threat Assessment, saying, “This is not the first time that the DEA produces a baseless report” (Pantoja, 2024). Sheinbaum also followed AMLO’s lead on throwing questions back at the United States, asking, “What is happening in the United States that they have such a deep addiction to fentanyl...You have to review the DEA’s sources to have an opinion” (Pantoja, 2024).

### TROUBLED TEXAS RELATIONSHIP

Texas largely went unnoticed early in AMLO’s relationship, until Governor Greg Abbott began focusing on border security. Abbott introduced inspections of Mexican cargo in 2022 to force action on immigration enforcement (Reiley and Sieff, 2022). He subsequently forced four Mexican states into agreements to slow northward migration, but the flow continued.

AMLO began noticing Abbott’s actions and started berating him at the president’s morning news conference, accusing the Texas governor of “[acting] in a racist manner” (Proceso, 2023). He also urged Latinos in the United States to not vote for Republican candidates such as Florida Governor Ron DeSantis for promoting anti-immigration laws (DW, 2023).

The relationship especially soured after Texas installed buoys in the Rio Grande at Eagle Pass to thwart migration. Mexico filed a diplomatic

note, saying the buoys infringed on its sovereignty (Secretaría de Relaciones Exteriores, 2023). Mexico supported U.S. lawsuits against Texas, wherein the U.S. government argued the border buoys jeopardized relations with Mexico (Dey, 2023). The Mexican foreign ministry also joined in action against Texas’ Senate Bill 4, which the Texas Public Policy Foundation said, “creates new state offenses for entering or reentering the state illegally from a foreign country and for refusing to comply with an order to return to the foreign country an illegal alien comes from” (2024).

Despite initial misgivings, AMLO appeared to have found common ground with Biden, namely on their mutual displeasure with Texas’s border protection measures. He wrote a letter to Biden, “You’re the first president in decades who hasn’t sought publicity building walls on our border, much less acting in an irresponsible and inhuman manner like the governor of Texas by placing buoys with barbed wire in the Río Bravo, violating our sovereignty” (Agren, 2023).

### U.S. Lawsuit Against Gunmakers

The Mexican government brought lawsuits against eight U.S. gun manufacturers in 2021, arguing that the American manufacturers armed Mexican drug cartels by failing to control their dealers and thus unleashed bloodletting south of the border (Debusmann Jr., 2024). The suit was dismissed by a Massachusetts court, but an appeals court ruled in Mexico’s favor, allowing the case to proceed (Debusmann Jr., 2024). Another lawsuit filed against five Arizona gun dealers is also proceeding. The Sheinbaum administration is expected to continue with these cases and push for a crackdown on U.S. gun smuggling into Mexico.

### BIDEN OR TRUMP?

How U.S.-Mexico relations unfold under the Sheinbaum administration is likely to depend heavily on the November U.S. elections. Sheinbaum has said Mexico will work with whoever wins, though it’s uncertain if she would reach the same understanding shared by AMLO and Trump—two populists and self-styled outsiders.

With a Biden administration, Mexico's relations with the United States would likely return to its traditional format prior to Trump's election, according to observers of Mexican foreign affairs. In past administrations on both sides of the border, diplomats siloed key areas of the bilateral relationship. These areas included security, trade, migration, and human rights. Migration discussions did not involve trade, that is, until Trump threatened tariffs to spur Mexican action on migration enforcement.

It's likely that Biden would be able to work with Sheinbaum on a broader suite of bilateral issues than Trump. Climate—something AMLO showed scant interest in pursuing—is a possible point of agreement between Sheinbaum and Biden as the Mexican president-elect has promised to prioritize clean energy ([El Financiero, 2024](#)).

A Trump administration would put all issues on the table. He would likely demand action on fentanyl—like a Biden administration—but Trump is more likely to raise the specter of U.S. intervention into Mexico if security cooperation is deemed insufficient. Such a threat would stoke outrage in Mexico, where sovereignty is a pillar of the ruling MORENA party. Ernst, the analyst with the International Crisis Group, says intervention would also continue the kingpin policy of taking out drug cartel bosses, causing more violence as underlings fight for power ([International Crisis Group, 2022](#)).

Threats of commercial retaliation would likely generate ill-will and could probably incur action on the Mexican side as the country wants to keep the border open to commerce at all costs, according to analysts in private interviews.

A second Trump administration would also be likely to revive policies such as "Remain in Mexico," which required asylum seekers to wait on the Mexican side of the border while their claims proceeded through U.S. courts. Sheinbaum's administration would be unlikely to go along with another attempt at reviving "Remain in Mexico," according to sources familiar with its thinking on foreign policy.

## **A NON-INTERVENTIONIST FOREIGN POLICY OF INTERVENTION**

AMLO has showed scant interest in foreign policy throughout his career. He seldom travels abroad—not even for major international summits such as the G20—campaigning on the premise that the best foreign policy is domestic policy. He also spoke ad nauseum of a "non-interventionist" foreign policy.

The principle of non-intervention stems from the Estrada Doctrine, in which Mexico abstains from commenting on other nations' internal affairs, while expecting the same of others. AMLO repeatedly raised the principle of non-intervention with the United States—and even Canada, which reimposed visas requirements on Mexican nationals in March 2024—notably rebuking Republican lawmakers raising the prospect of intervention into Mexican territory. "Mexico is respected. We're not a U.S. colony or protectorate," AMLO said in March 2023. "It is an arrogant, treacherous, stupid attitude, of course, interventionist" ([Capital 21, 2023](#)).

### *Intervention in Latin America*

AMLO's supposed non-intervention policy has not been applied in relations with left-leaning governments and politicians in South America. His intervention resulted in the expulsions the expulsions of Mexican ambassadors from Bolivia, Peru and Ecuador ([Yañez, 2024](#)).

The president intervened in Bolivia in 2019 after protests forced then-President Evo Morales to resign after proclaiming victory in an election rife with irregularities. AMLO sent a military plane to Bolivia to fetch Morales and offered him asylum ([Associated Press, 2019](#)).

AMLO later backed Peruvian President Pedro Castillo after he tried to close Congress in what analysts called a "self-coup" ([Agren, 2022a](#)). Mexico later granted asylum to former Ecuadorian vice-president Jorge Glas (who was wanted on corruption charges), prompting Ecuadorian troops to enter the Mexican Embassy in Quito to arrest Glas ([García Cano & Molina, 2024](#)). Mexico, joined by other nations,

denounced the intervention into its embassy as a violation of the Vienna convention and took the case to The Hague ([Secretaría de Relaciones Exteriores, 2024](#)).

### **Defending Drug Cartels Abroad**

Glas served under former President Rafael Correa—who was convicted on bribery charges in 2020 but living in Belgium—whose political faction still has significant political force in Ecuador ([France 24, 2020](#)). Investigations by MCCI revealed showed how a key Correa operator went on manage social networks for AMLO and advise the Mexico City government ([Buendía, 2023](#)).

Ecuador has descended into drug cartel violence in recent years, with Mexican cartels moving in on what was once a placid country. Both the Sinaloa Cartel and CJNG have allied with Ecuadorian criminal gangs, fighting over exports of cocaine through the country's ports.

AMLO has reacted angrily to suggestions of Mexican drug cartels causing havoc in Ecuador, while a diplomatic source says foreign ministry officials have been dismissive of the South American country's security concerns. "You have to act very responsibly, not casually blame anyone and wait for the investigations," he said in October 2023 after Ecuadorian anti-corruption crusader and presidential candidate Fernando Villavicencio was assassinated in an atrocity blamed on drug cartels ([Presidencia de la República, 2023](#)).

Villavicencio had previously said, "(Andrés) Manuel López Obrador should face his problem with the mafias. There, in that country, where a large part of the political class has been financed by drug trafficking" ([Jiménez, 2023](#)).

### **Supporting Latin America's Bad Actors**

AMLO has provided steadfast support for Latin America's bad actors throughout his administration, never once calling out human rights violations in Cuba, Venezuela and Nicaragua. He led a boycott of the 2022 Summit of the Americas in Los Angeles

over the hemisphere's three dictatorships not being invited ([Sarukhan, 2022](#)).

The president imported Cuban doctors (a source of revenue to the country's communist government) and sent cheap gasoline to the island government and invited President Díez Canal as guest of honor at 2021 independence celebrations ([Associated Press, 2023d](#); [Squires, 2024](#); [Verza, 2021](#)).

AMLO and his allies have showed a willingness to indulge Russia, too. He never once criticized Russia's invasion of Ukraine, while his allies in Congress formed a Mexico-Russia friendship group ([La Jornada, 2022](#)). Russian troops marched through central Mexico City at the 2023 military parade ([Associated Press, 2023a](#)). The Russian Embassy also increased its accredited diplomats in Mexico from 49 prior to its invasion of Ukraine to 85—suggesting possible espionage, according to Estévez, the *Eje Central* journalist ([Estévez, 2023](#)).

### **Sheinbaum: "It's a Symbol of Pride"**

Sheinbaum has given little indication of breaking with AMLO on foreign policy and part of the MORENA base, its ally in the Workers' Party (PT), and the left-leaning newspaper *La Jornada*, which has received generous government advertising under López Obrador, openly support the regimes in Venezuela and Cuba ([Bravo, 2021](#)). She said tersely to the third candidate when asked of AMLO's foreign policy, "It's a symbol of pride" ([Instituto Nacional Electoral, 2023](#)).

## **THE PROMISE OF NEARSHORING**

Sheinbaum assumes office as the promise of nearshoring (sometimes called "friend-shoring") is expected to take hold, with companies moving production and supply chains from China to North America. The concept involves companies moving supplies chains and manufacturing to countries near their main market—often the United States—to cut costs or avoid geopolitical risks.

Nascent signs of nearshoring appear in cities such as Monterrey, where Asian investment (especially Chinese investment) in manufacturing has



poured in (Murray, 2023). Foreign Direct Investment (FDI) reached a record \$20.3 billion in the first quarter of 2023, according to the Economy Secretariat (Carbajal, 2024). Space in Mexico’s industrial parks, especially in the borderlands, is at a premium (Forbes México, 2024).

Business analysts, however, say that Mexico is squandering its nearshoring opportunity as AMLO shows little interest in promoting Mexico as an investment destination (Financial Times, 2023). Instead of pursuing foreign investment, AMLO has preferred to build megaprojects in the country’s long-underperforming southern states, such as the Tren Maya, Olmeca Refinery in his home state of Tabasco and the interoceanic corridor across the Isthmus of Tehuantepec (Brown, 2024).

### Top U.S. Trading Partner

The prospect of nearshoring—along with hawking monetary policy and record remittances—has sent the Mexican peso soaring in 2023 and 2024, making it the world’s best-performing currency against the U.S. dollar (Kaberna, 2024). The peso has reached its highest level versus the U.S. dollar since 2015, gaining 20% on the greenback over the past two years (Dolan, 2024). AMLO has often boasted of the peso’s impressive gains—something Mexicans consider a proxy for economic strength and stability in a country with a history of currency crises prior to the central bank gaining independence in 1994.

Exports to the United States have also boomed in recent years. Mexico replaced China as the top U.S. trading partner in 2023, as geopolitical tensions between the United States and China escalated (López & Vázquez, 2024). Chinese investment and trade has poured into Mexico over the past five years, stoking fears of Mexico being used for surreptitious imports of Chinese goods into the United States.

### China: “The Elephant in the North American Room”

China investment in Latin America has traditionally targeted extractive industries. Chinese investment in Mexico has focused more on manufacturing, as

Kenneth Smith Ramos, Mexico’s lead negotiator in USMCA talks, told the 35 West podcast (Hernandez-Roy, 2024).

Trade is so robust that “container shipping demand from China to Mexico” jumped by 60% between January 2023 and January 2024, according to Xeneta, a data analytics firm (Sand, 2024). The annual growth rate of trade between the two countries expanded nearly tenfold from 3.5% in 2022 to 34.8% in 2023 (Sand, 2024).

Chinese automobiles have flooded into Mexico, despite Mexico being a major auto manufacturer. Imported Chinese vehicles claimed 19.4% of the Mexican market over the first nine months of 2023, according to the Association of Mexican Automobile Distributors (Cota, 2023). Import volumes were so strong that the newspaper *El País* reported a lack of car carriers to take the Chinese vehicles from the port in Lázaro Cárdenas (Cota, 2023).

### Triangulation

Changes in Mexico’s trade dynamics with China have fueled speculation of triangulation, with China using Mexico as a gateway for tariff-free access to the U.S. market. Mexico imposed tariffs on some Chinese imports—a move UBS described in a research note as pre-emptive “to avoid retaliatory tariffs” on its own exports to the United States (De la Fuente, 2024). The note states, “Chinese automakers’ plans to build factories in Mexico could be seen as a threat to the U.S. Looking ahead, we think the U.S. may likely invoke the USMCA’s ‘sunset clause’ in July 2026, and that a tightening of rules of origin and minimum content requirement for manufactured goods will be at the top of the U.S. agenda.”

### USMCA “SUNSET CLAUSE”

Sheinbaum has pledged support for the USMCA trade agreement with Canada and the United States, despite disputes over energy and GMO corn restriction, as 80% of Mexican exports head for the United States (Rojas, 2024b; Barrera and Garrison, 2024).

The trade agreement will come up for review in 2026. The agreement will continue for 16 years if the three countries agree to extend the agreement. If one of the countries declines to extend the agreement, the USMCA will be subject to annual reviews. A willingness to continue with the agreement may well depend on China and Mexico's trade policy toward it (Vargas et al, 2024).

"China," Smith Ramos told 35 West, "is the elephant in the North American room" (Hernandez-Roy, 2024).

## CONCLUSION

Claudia Sheinbaum won a historical election by becoming Mexico's first female president. Questions persist, however, about whether her mentor, AMLO, will retire to his ranch in Chiapas state or remain active in politics and in the MORENA party he founded. Mexican presidents have a history of attempting to meddle in the successor's administration—often without success—according to analysts interviewed for this report. But Sheinbaum's career has been tied to AMLO's since the start, and she has no political base of her own.

As president, she will confront enormous challenges, starting with public security. Drug cartels increasingly control swaths of Mexican territory—some 40%, according to former U.S. Ambassador to Mexico, Christopher Landau (Davidson, 2021). The cartels are increasingly meddling in politics (as evidenced by the slayings of candidates) as they attempt to seize state resources and expand into non-drug trafficking activities such as extortion. Sheinbaum promoted better policing in Mexico City and has spoken of doing the same on the national level. However, she will confront a powerful military, which has assumed increased security tasks in recent years—along with other civilian tasks such as operating railways and airports—thus complicating her plans for improved policing.

Sheinbaum is likely to prioritize relations with the United States, to which Mexico sends nearly 83% of its exports (Data Mexico, n.d.). Conversely, she is likely to face U.S. demands to take action on transmigration

through Mexico—which is increasingly coming from South America and other continents rather than the usual sources in Central America—along with calls for action stopping fentanyl production and exports. Her strategy for dealing with the United States will depend on the November U.S. election. She says she will work with whoever is elected. Although it is likely that a Biden win will result in a broader agenda which will incorporate issues such as climate, while a Trump victory will likely mean a focus on trade and security (to the exclusion of other topics).

The new president assumes office at a time of promise for Mexico. Nearshoring, in which companies relocate supply chains and operations closer to the U.S. market for commercial and geopolitical reasons, appears likely to favor Mexico. The country's proximity to the U.S. market and participation in the USMCA trade agreement is attractive for companies wanting to access the United States, while avoiding the risks of China. Mexico has already replaced China as the U.S.'s top trading partner in a nascent sign of changing trade flows toward Mexico.

Sheinbaum will face challenges as China continues its commercial incursions into Mexico—a move drawing suspicion from the United States (The Economist, 2024b). Mexico will also participate in the scheduled 2026 review of the USMCA trade deal. Sheinbaum has promised to stick with López Obrador's policies of putting oil production and electricity generation under state control—leaving the country short of electricity as manufacturers come knocking.

Sheinbaum takes the oath of office October 1, but the person who will ultimately wield power remains a mystery to most Mexicans. Alex González Ormerod, editor of the business publication *Whitepaper*, summed up the sentiments of many Mexicans with his comments: "I'm desperate to know who the real Claudia is. But we won't know it until she's sitting in that chair...and can exert power for the first time." ■

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