MIRANDA INTELLIGENCE

Political Chatter

June 4, 2026

After weeks of accumulated tensions in the bilateral relationship between Mexico and the United States — marked by the "CIAgate" case, Rocha Moya, and now the alleged investigations into Américo Villarreal and Alfonso Durazo, governors of Tamaulipas and Sonora — former President Andrés Manuel López Obrador broke months of silence with a call in defense of President Claudia Sheinbaum against what he called "the onslaught of the U.S. government against Mexico's." Through a five-page letter shared on social media, López Obrador echoes the president's position that it is a group of far-right radicals within the Trump administration who are straining the relationship with Mexico. The former president goes further and invites Trump to "tell the parasites surrounding and egging him on to go to hell."

As Viri Ríos analyzes, the message is not about Trump but about the party's strategy: not one step back, even if that implies costs for everyone. For Jesús Silva-Herzog Márquez, the ruling party's sovereignty defense narrative becomes a shielding mechanism against any counterweight, deepening a logic of polarization that could define the rest of the administration.
In parallel, U.S. officials such as National Security Secretary Markwayne Mullin publicly acknowledged bilateral security cooperation, confirming that the relationship operates simultaneously at two speeds: that of public confrontation, driven by electoral rhythms, and that of day-to-day coordination, running alongside the political turbulence.

On the domestic front, the conflict with the CNTE is also showing no signs of letting up. With the 2026 World Cup a week away from kicking off, teachers stormed SEP facilities, caused damage, and are maintaining threats of blockades at the AICM and around the Azteca Stadium. Sheinbaum hardened her tone, accused the union of acting "like the far right," and reiterated that she will not meet personally with its leaders. The conflict is shaping up as a political test for Mario Delgado and Rosa Icela Rodríguez, who are tasked with breaking the negotiating deadlock.

On the trade front, the government received a favorable development: exports complying with USMCA rules will remain exempt from Trump's new tariffs. However, Washington is analyzing the imposition of an additional 10% tariff on Mexican products over alleged government omissions in combating forced labor, opening a new pressure front that confirms the USMCA shield has its limits.

On the institutional front, constitutional reforms were published postponing the judicial election to 2028 and incorporating foreign interference as grounds for electoral nullification. Operation Swarm continued advancing in Morelos, where at least 15 mayors and former mayors are under investigation for alleged ties to organized crime, and a judge ordered pretrial detention for the mayor of Cuautla for links to the Sinaloa Cartel. The capture of Antonio Molina Díaz, former federal prisons coordinator under the Calderón and Peña Nieto governments, added a new chapter to the dismantling of García Luna's inner circle, accused of diverting more than 5 billion pesos through simulated contracts.

MIRANDA INTELLIGENCE

MXUS Pressure, support, and cooperation: AMLO returns to the scene to back Sheinbaum

What began as a diplomatic dispute over U.S. criticism of Mexico's security strategy threatens to become a larger political problem for Morena. Just days after the mass rally led by Claudia Sheinbaum in defense of national sovereignty — and the hardening of her rhetoric in the face of pressure from Washington — a Los Angeles Times report shook the political landscape by reporting that Morena governors Alfonso Durazo and Américo Villarreal are under investigation by U.S. authorities for alleged ties to organized crime and that their visas have been revoked. Although both governors rejected the allegations and demanded evidence, the issue once again put Morena on the defensive and fueled speculation about growing U.S. pressure against prominent ruling party figures.

The controversy arrives in an especially sensitive context. In recent months, episodes straining the bilateral relationship had already accumulated — from the cancellation of Marina del Pilar Ávila's visa to the allegations surrounding the Sinaloa case and Rubén Rocha's political circle. Against this backdrop, Sheinbaum denounced attempts to influence Mexican political life and called for blocking foreign interference ahead of the 2027 elections. Yet amid the rhetorical escalation, signals of cooperation also emerged: U.S. officials publicly acknowledged that the Mexican government has been an active security ally and highlighted bilateral coordination. The week's main development, however, was the reappearance of Andrés Manuel López Obrador, who broke months of silence to publish a letter of support for the president. In it he expressed his "unconditional" backing, accused U.S. officials of seeking to weaken Morena, and attributed the pressures to political and electoral interests. His return to the public debate comes precisely when the Mexico-U.S. relationship is navigating one of the most delicate moments of the administration and confirms that the issue has ceased to be solely diplomatic — it is now also political.

Milenio: U.S.: Mexico cooperates like never before; "we must respect" its sovereignty
Proceso: U.S. investigates Alfonso Durazo and Américo Villarreal: Los Angeles Times

⚽ **CNTE puts the government on the ropes days before the World Cup**

With just one week to go before the 2026 World Cup opening ceremony in Mexico City, the CNTE has become one of the federal government's biggest headaches. President Claudia Sheinbaum hardened her tone against the dissident teachers' union, accusing it of acting "like the far right" for rejecting the government's proposals, and reiterated that she will not meet personally with its leaders, as negotiations are already being handled by the secretariats of the Interior and Education. Meanwhile, the federal administration is seeking to defuse the conflict with an offer that includes dismantling the USICAMM, strengthening the PensionISSSTE, and improving retirement schemes — but the union, true to form, is pushing negotiations to a breaking point.

Far from abating, the protests have escalated. In recent days, teachers stormed SEP facilities, caused damage, launched gas, and maintained blockades at various points across Mexico City, while threats grow of actions at the AICM and during the World Cup opening, including blockades at Azteca

Stadium and fan fest areas. The CNTE is insisting on a direct meeting with Sheinbaum and maintaining its demand to repeal the 2007 ISSSTE Law. With the World Cup countdown underway, the conflict is shaping up as a political test for the government, which is seeking to prevent the mobilizations from overshadowing one of the administration's most important international events. This is the moment for Secretaries Mario Delgado and Rosa Icela Rodríguez to demonstrate their political negotiating skills.

🖇️ El Sol de México: Eight days before the World Cup, the CNTE storms the SEP headquarters by force and causes damage

🏭 USMCA protects, Washington warns

Amid growing commercial tension with the United States, the Mexican government received a favorable development: the Secretariat of Economy confirmed that Mexican exports complying with USMCA rules will remain exempt from the new tariffs announced by the Trump administration. The measure represents relief for key sectors such as automotive, electronics, and manufacturing, which depend heavily on the U.S. market. The announcement was presented by the Sheinbaum government as evidence of the treaty's strategic importance and of Mexico's ability to maintain preferential conditions relative to other countries.

However, the calm may be short-lived. This week it emerged that Washington is analyzing the imposition of an additional 10% tariff on Mexican products over alleged government omissions in combating forced labor within certain supply chains. Although the measure has not yet materialized, the allegation opens a new pressure front for the Sheinbaum administration and confirms that the relationship with the United States is entering a phase of growing scrutiny. Thus, while the USMCA continues to function as a shield for much of Mexico's exports, the White House keeps new commercial pressure tools on the table that could complicate the economic and political landscape in the months ahead.

🖇️ Latinus: Trump government threatens 10% tariffs on Mexico over forced labor omissions

🚘 Another tentacle of the García Luna case falls

The capture of Antonio Molina Díaz, former coordinator of federal prisons under the governments of Felipe Calderón and Enrique Peña Nieto, brought renewed attention to the alleged corruption network headed by Genaro García Luna. The Attorney General's Office accuses him of participating in a scheme that allegedly diverted more than 5 billion pesos through simulated contracts and shell companies related to the construction and operation of eight federal penitentiary centers. Molina was detained in Mexico City on charges of embezzlement and organized crime for money laundering purposes, in an investigation that also involves former officials, relatives, and associates of the former Secretary of Public Security. The detention represents a new chapter in the long dismantling of García Luna's inner circle, now imprisoned in the United States for drug trafficking. According to the

Attorney General's Office, Molina was part of the structure that enabled the alleged looting of public resources destined for the federal prison system.
📎 Milenio: Antonio Molina, former prison chief under Calderón and Peña Nieto and linked to Genaro García Luna, arrested

📜 The DOF officially publishes judicial and electoral reforms

The federal government published in the Official Gazette the constitutional reforms modifying various aspects of the judicial election and the electoral system. Among the most significant changes is the postponement of the next federal judicial election to 2028, as well as new provisions for the registration and review of candidacies, stemming from the adjustments pushed through Congress following the first judicial voting experience.
The reform also incorporates as grounds for electoral nullification the proven existence of foreign interference that influences electoral results. The measure was promoted by Morena and its allies as a mechanism to protect national sovereignty, while the opposition warned of risks of discretionary interpretation and potential impacts on electoral certainty. With its publication in the Official Gazette, the amendments formally entered into force across the country.
📎 Milenio: DOF publishes reforms to the Judicial Branch, electoral nullification for interference, and candidate "shielding"

🚨 Narco-politics crackdown tightens around Morelos mayors

The offensive against organized crime's infiltration of municipal governments escalated in Morelos. According to state and federal investigations cited by El Universal, at least 15 mayors and former mayors are under investigation for alleged ties to criminal groups, particularly in municipalities in the eastern and southern parts of the state. The inquiries are part of the so-called Operation Swarm, which seeks to dismantle political, financial, and operational protection networks that allegedly enabled criminal organizations to expand across various municipal governments.
In this context, a federal judge ordered pretrial detention for the mayor of Cuautla, Jesús Corona Damián, arrested on charges of organized crime and extortion. The Prosecutor's Office accuses him of alleged ties to members of the Sinaloa Cartel, while investigations continue into possible links between other municipal officials and criminal activities. The case has placed Morelos as one of the main focal points of the federal strategy against collusion between local authorities and organized crime.
📎 El Universal: Morelos: 15 more municipalities linked to criminal groups

⚖️ Former secretary under Adán Augusto escapes Estafa Maestra case

A federal tribunal determined that there are insufficient elements to prosecute Ramiro Chávez Gochicoa, former rector of the Universidad Politécnica del Centro and former Secretary of Culture of

Tabasco under the government of Adán Augusto López, over a contract of more than 31 million pesos linked to the corruption scheme known as the Estafa Maestra.

The Attorney General's Office maintained that the university failed to comply with an agreement signed with the then-Sedatu in 2016 and that the deliverables presented deficiencies and irregularities. However, both a control judge and an appellate court concluded that the indictment lacked sufficient evidence to establish the former official's probable responsibility, allowing him to avoid being formally linked to proceedings for unlawful use of authority and powers.
Reforma: Former secretary under Adán escapes Estafa Maestra case

Opinion express

- **The regime entrenches itself — Jesús Silva-Herzog Márquez**

Silva-Herzog argues that the government's reaction to growing external pressures and security questions has been to reinforce its political and institutional position. In his view, the ruling party uses the sovereignty defense narrative to close ranks, discredit criticism, and consolidate power, in a dynamic where confrontation becomes a mechanism for internal cohesion. The author warns that rather than opening spaces for deliberation, the regime opts to shield itself against any counterweight, deepening a logic of polarization that could define the rest of the administration.
Reforma: The regime entrenches itself

- **AMLO's letter to Trump — Viri Ríos, Milenio**

Ríos analyzes former President López Obrador's letter to Trump as a warning that the party will defend itself with every tool available against what it perceives as Washington's attempt to weaken Morena in order to empower a right-wing government subordinate to U.S. interests — and that this defense will carry costs for everyone, including the United States, investors, and those who today celebrate Trump's interventionism. Ríos draws a parallel with Lula da Silva in Brazil, who stood up to Trump when he tried to back Bolsonaro, and concludes that Morena reasons similarly: the choice is not between losing and winning, but between losing with dignity or losing while inflicting damage on adversaries.
Milenio: AMLO's letter to Trump

- **PAN: past and futures — Alberto Aguirre**

Aguirre argues that the PAN's recent relaunch has ended up benefiting Claudia Sheinbaum more than the opposition itself. His argument is that the reappearance of figures and rhetoric associated with traditional panismo makes it easier for the ruling party to reactivate its narrative of contrast with past governments. In that context, the author argues that Morena's main political advantage remains the weakness of its adversaries: while the opposition struggles to reinvent itself, the government finds new ammunition to keep its continuity and confrontation discourse alive ahead of the 2027 midterms.
El Economista: PAN: past and futures

- **The immolation of the hardliners sabotages the 4T — Jorge Zepeda Patterson**

Zepeda Patterson argues that one of the greatest risks facing the Fourth Transformation does not come from the opposition, but from the most radical sectors within the movement itself. The columnist warns that Claudia Sheinbaum faces the challenge of staying the course without yielding to ideological pressures that could compromise governability, economic growth, or political stability. In his view, the experience of other Latin American left-wing movements shows that the pursuit of doctrinal purity can ultimately weaken successful projects — and that the president's main test will be preventing the hardliners from sabotaging the 4T from within.

📎 El País: The immolation of the hardliners sabotages the 4T

- 📝 **Agenda in brief**

The Mexican government will present the prototype of Olinia on June 7 — the country's first domestically developed electric vehicle — as part of the federal strategy to promote electromobility and a national automotive brand. The project envisions low-cost urban models with estimated prices between 90,000 and 150,000 pesos.