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North American Neomercantilism and Energy Sector Integration: Trade Disputes, Green Marketing, and the Continental Infrastructural Regime

Neomercantilismo norteamericano e integración del sector energético: disputas comerciales, mercadotecnia verde y el régimen infraestructural continental

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Abstract

President Trump's 2025 trade war placed North America's continental energy and infrastructural regime at the center of hemispheric disputes, from CUSMA renegotiation to intensified competition over regionally proximate energy sources. This article examines how Mexico and Canada are repositioning within this system amid the global oscillation between neoliberalism and neomercantilism. We argue that internal tensions arising from this shift are addressed through extended extractivist relations, including the imposition of resource dependency on Mexico, facilitated by "green marketing" that discursively frames new infrastructure investment as eco-modern. Reviewing regulatory changes to Mexican and Canadian energy policy, the article analyzes two emblematic projects—the Tren Maya (Alstom/Bombardier) and TC Energy's gas pipelines—showing how both extend extractivist relations while branded as "green." These infrastructures are co-constituted with border securitization and migration control, revealing neomercantilism's convergence with authoritarian nationalism and the deepening commodification central to neoliberal capitalism.

Key words: neomercantilism, North American energy integration, green marketing, extractivism, border securitization and migration.

Resumen

La controvertida guerra comercial iniciada por el presidente Trump en 2025 colocó en el centro del debate hemisférico al régimen energético e infraestructural de América del Norte, en el marco de la renegociación del T-MEC. Este artículo examina cómo México y Canadá se reposicionan

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ante dicho régimen en medio de la oscilación global entre neoliberalismo y neomercantilismo. Se argumenta que las tensiones derivadas de este viraje se resuelven mediante la extensión de relaciones extractivistas —incluida la imposición de dependencia de recursos naturales sobre México— facilitada por una "mercadotecnia verde" que enmarca discursivamente nuevas inversiones en infraestructura como ecomodernas. A partir de los cambios regulatorios en la política energética mexicana y canadiense, se analizan dos proyectos emblemáticos: el Tren Maya (Alstom/Bombardier) y los gasoductos de TC Energy, que extienden relaciones extractivistas pese a su etiqueta "verde" y se articulan con la securitización fronteriza y el control migratorio, lo cual revela la convergencia del neomercantilismo con el nacionalismo autoritario.
Palabras clave: neomercantilismo, integración energética norteamericana, mercadotecnia verde, extractivismo, securitización fronteriza y migración.

President Trump's controversial trade war of 2025 began by spotlighting the North American market, including the CUSMA regime negotiated under his first administration. Central to North American trade relations (Garrido, 2022) is a continental energy and infrastructural regime, encompassing transportation infrastructure that makes cross-border trade in hydrocarbons and other resources possible. The global trade bottlenecks that arose from the Covid-19 lockdown further underlined the importance of this specifically continental trade infrastructure to regional provisioning, notably of energy resources. Iran's closure of the Strait of Hormuz under the current U.S.-Israel war on Iran intensifies demand for regionally-proximate energy sources. For some time, the U.S. has marketed its natural gas as a "green" alternative to Mexican heavy oil and Canadian tar sands. After Mexico's 2014 energy reform, this strategy contributed to the reversal of Mexican sovereignty —shifting from net exporter to net importer of hydrocarbons from the U.S. in 2017 (Hernández and Zalik, 2018).

Simultaneously, the U.S. position as a net importer of Canadian hydrocarbons has sparked Trump's ire, whose push to displace the neoliberal continental trade regime forms part of his nationalist, neomercantilist agenda. While some late 20_{th} century neomercantilist projects were associated with the welfare state and Keynesianism, today's version echoes mid-century totalitarian fascism (Turtur, 2024), emerging under conditions of plutocratic authoritarianism and the ascendancy of far-right movements. Contemporary electoral shifts to the political right, like those a century ago, are connected to broader global crises of capital expressed in violent conflict and trade disputes over strategic resources, land and territory, and protectionist border and migration strategies.

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In this context, this paper examines how Mexico and Canada are repositioning themselves within a continental energy and infrastructural system amid global vacillation between neoliberalism and neomercantilism. We argue that in the North American context, the internal tensions arising from the shift from neoliberalism to neomercantilism are addressed through the extension of shifting forms of extractivist relations, including the imposition of natural resource dependency on Mexico. These relations are facilitated through tactics of "green marketing", which discursively frame new project investments as supporting eco-modern infrastructure.

Such infrastructure projects partially reverse flows of exploitable labour and resources that had fueled U.S.-centric neoliberal capitalism. The U.S. transition from requiring imports of Canadian and Mexican oil supplies to pursuing net exportation has occurred in tandem with a shift toward mercantilism fuelled by far-right, pronatalist, and pro-war discourse and policy. This rightward and mercantilist move is co-constituted with the intensification of neoliberalism in public policy that deepens the precarization and commodification of human lives, social programs, and resources. Globally, this entails a shift from the "free trade" policies of neoliberalism and the Washington Consensus to the implementation of trade barriers in the national interest, indicating a resurgent neomercantilism.

To advance this argument, the article begins with an overview of neoliberalism and neomercantilism in relation to the current global and North American trade regime. We then turn to Canadian and Mexican regulatory modifications to energy and infrastructural policy, including the undermining of CUSMA under Trump's current tariff war, shifts in Mexican and Canadian policy running concurrently, and the restructuring and privatization of the Mexican hydrocarbon and energy sectors that preceded it, comprising Canadian geostrategic investment interests in that restructuring process.

These changes set the stage for the subsequent section concerning emblematic examples of major transportation and energy infrastructure projects supported by the Canadian government that manifest the political-ecological contradictions inherent within a shift from neoliberalism to neomercantilism in trade policy, even as the commodification of social relations central to neoliberal policy is intensified: the Tren Maya project via Alstom/Bombardier, and TC Energy gas pipelines supplying the Mexican energy grid with U.S. fracked gas. Both exemplify the extension of extractivist relations yet have been marketed as advancing a "green" transition. Both also reveal attributes of neomercantilism, co-constituted with broader projects to secure and police borders from unwanted arrivals, to protect "national resources" and secure energy supplies, and bolster the power of the key regional (and global) hegemon, the United States.

Over the past decade, as discussed here, TC Energy strategically relocated part of its leadership from Canada to the U.S. and, by supplying U.S. natural gas to the Mexican energy grid, advanced a balance of trade compatible with Trumpian neomercantilism. The Tren Maya project, running across southern Mexico, along with the dispossession and real estate speculation associated with it, is marketed as a "green" tourist train to conservation and tourist sites during the day, while facilitating freight transport to a mushrooming industrial corridor along the southern Mexican border at night. This commercial corridor simultaneously requires precarious labour, including migrants, in a region increasingly defined by extractivist relations and externalized border control that restricts migrants from moving north to seek safety and protection in the U.S. and Canada.

From Neoliberalism to Neomercantilism in Trade Policy

At the end of the 1970s and the beginning of the 1980s, in what came to be termed contemporary "globalization", most welfare/developmental states of the Global North and South began to dismantle their social policies and protections. This entailed the extension of world capitalist production relations and the suppression of pre- and/or non-capitalist economic relations (Robinson, 2013). Under this shift, one that Polanyi (2002) had theorized in an earlier period as a "great transformation", spheres of human activity —including public spheres managed by States and private spheres linked to the community and the family— were increasingly dissolved, commercialized, commodified, and encompassed into capitalist logics (Robinson, 2013) neoliberalism.

In the late 20th century, the formal implementation of neoliberalism led to the modification of constitutions, laws, and public policies, displacing the centrality of the public good and forcefully incorporating the private sector into areas previously exclusive to the State. The conversion of public and common goods into commodities was a core element to these new policies; objects that were previously inaccessible or protected —such as goods, resources, and social rights that were provided, guaranteed, and/or managed by the State (e.g. water, education, health, pensions, natural resources, among others)— became increasingly subject to market relations. As a result, a profound process of denationalization took shape within many nation-states (Sassen, 2010: 115-116), including the removal of tariffs and other protections on national industry and workers.

State ministries increasingly reoriented practices to conform to global market competition. The undoing of socio-environmental regulatory protections heralded in the "race to the bottom" in national industry standards, a consequence of so-called

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"free trade" under the World Trade Organization rules inaugurated in 1995 (Chan, 2003). In many countries, processes of industrial denationalization of parastatal companies entailed the creation of new institutions to facilitate and offer certainty (now referred to as "derisking" under financialization, see further below) to private and transnational capital. In Mexico, and to a lesser extent, also in Canada and the U.S., this process included the selling off or closure of public utilities and the deregulation of economic and labor norms. In the aftermath, new or restructured state organizations were left in charge of managing and/or facilitating the operation of private entities in strategic sectors (energy, hydrocarbons, water, telecommunications, mining, lands, among others), often in so-called "public-private partnerships" (Sandoval, 2015).

To give legal effect to these processes, political constitutions and secondary laws were reformed. Broadly, we can classify the legal norms that emanated from the neoliberal period as privatizing the public and the common, deregulating private entities, and generating new market-oriented institutions. Co-constitutive with this regulatory shift were changing monetary policies, beginning with the 1971 end of the gold standard —wherein global currencies were allowed to float with the U.S. dollar, that were lynchpins of ongoing processes of global financialization (Gowan, 1999).

By the end of the 1990s, the contradictions within the neoliberal trade regime, which itself emerged as a response to contradictions of Keynesianism, had come home to roost. A series of financial crises from the 1980s onward —the Mexican peso crash being an important one—signaled the dangers of largely unprotected global financial relations subject to speculation. The Asian financial crises of 1993 and 1997 were further expressions of this problem. Ultimately, the 2008 Wall Street crash marked a transition to what some refer to as a "posneoliberal" era (Altvater, 2009). In the aftermath of 2008, changing international strategies to secure land and resources both within national borders and abroad began to be examined under the rubric of "new mercantilism". Thus, even before the recent Trump machinations, scholars described a "security mercantilism" overriding "the multilateral trading system governed by WTO rules, substituting direct access to productive land for food and fuel supplies rather than relying on market access" (McMichael, 2013: 48).

This form of mercantilism manifests in both onshore and offshore strategies: securing of *direct* access to land and resources (and visible in the U.S.' approach to Venezuela), in lieu of provisioning through trade. Amid a global hegemonic shift from the U.S. to a China-centred power, mercantilism may be understood as the pursuit of a favourable balance of trade, in which states seek to operate as net exporters rather than importers to ensure their ongoing political-economic power and influence. Thus, while commodified relations in state social security continue to reflect intensifying neoliberalism, transnational trade regimes are increasingly influenced

by rising militarized protectionism, curtailing the "market-opening" dynamics associated with neoliberalism.

In recent analyses, Eric Helleiner discusses the extended history of a neomercantilist reaction to what he categorizes as "free trade thought." Typically associated with Adam Smith, the latter school deemed free trade essential to prosperity, international peace, and "civilization. Neomercantilism, on the other hand, views protectionism via strategic government support and trade barriers as essential to industrial growth (Helleiner, 2023), an approach divergently and variously embraced by both right and left. Indeed, in the 2011 global "Occupy movement" after the 2008 crash —arguably itself inspired by preceding 2010 Arab Spring and Spanish austerity movements among others— was supported by both right and left pundits and politicians (Galián, 2019).[1]

Recent literature in political science has broadly applied the frame of neomercantilism to strategies of contemporary China, in particular its Belt and Road Initiative (Collins and O'Brien, 2023). What we view as Trump's "Make America Great Again" mercantilism in both his first and second administrations is coupled with a xenophobic approach to American jobs and resources and outright repression. The trade disruptions and consequent turn to "nearshoring" since the Covid pandemic (Brunat and Fontanel, 2025), accelerated neomercantilist trade shifts across the North American continent with some initial benefits for Mexican workers in Mexico's export sector. The renegotiation of CUSMA under the first Trump administration, ratified in 2019 after Andrés Manuel López Obrador (AMLO) took power in Mexico, brought some improvements to base working conditions, through a new labour side agreement and the Mexican labour reform that accompanied it, including a rapid response mechanism for labour complaints (Antal, 2020; Bensusan, 2022). In other areas, notably with relation to climate and environmental policy (Antal, 2025; 2020) and Mexican energy sovereignty, the CUSMA agreement was a significant disappointment (Hernández and Zalik, 2024). Ultimately, with Trump returning to power in 2025 with effective control over both houses of the U.S. government, the dangers for Canadian and Mexican jobs became strikingly manifest. These dangers have been amplified by a shift toward neo-fascist approaches to immigration and territorial power, in which racialized, undocumented, and non-citizen workers in the U.S. face detention, deportation, and other forms of violence, while countries from Cuba and Venezuela to Canada, Greenland and Iran experience military violence and the threat of territorial takeover.

[1] In the U.S. election primaries of 2015-2016, the support for an anti-free trade stance by both Bernie Sanders and among right wing constituencies offered one manifestation of this trend.

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North America under Neomercantilism

Since Trump assumed the U.S. Presidency in January 2025, the relationship between the CUSMA partners has been in a constant state of turmoil. This turmoil arises from the repeated threats, casual pauses and withdrawals, and the ultimate imposition of a punishing tariff regime on many U.S. trade partners, including Canada and Mexico. To an extent, these dynamics echo the tariffs imposed during the first Trump administration and the U.S.-Canada trade dispute, which were eventually resolved through the renewal of CUSMA (Chatzky et al., 2020).

Notably, the Canadian automotive and steel industries have received particular attention given Trump's tariffs on steel and aluminum as well as lumber and its derivatives. These have been justified under section 232 of the U.S. Trade Expansion Act of 1962, marking a significant dismantling of the relationships in place since at least the 1965 U.S.-Canada Auto Pact (Anastakis, 2005). Trump's blanket tariffs under the U.S. International Emergency Economic Powers Act (IEEPA), while formally struck down by U.S. courts, were subsequently replaced by new global tariffs (CBC, 2026). The severe consequences of these tariffs for Canada underline how more than three decades of "free trade" have compromised Canada's economic sovereignty, dating back, at least, to the imposition of the late 20th-century continental and global trade regime.

In early 2025, Al Jazeera columnist Andrew Mitrovica reflected on these dynamics in an op-ed emphasizing that Canadian economic autonomy had been handed over decades earlier (Mitrovica, 2025). Entitled "Canada already is America's 51st State" Mitrovica cited the writing of late Canadian political scientist Stephen Clarkson, whose work in the 1980s —including the book *Canada and the Reagan Challenge* (Clarkson, 1985)— emphasized the dangers of the then emerging neoliberal system for the global order and articulated an "increasingly bleak dystopia about Canada's chances of surviving the python-like embrace of market-driven integration" (Drache, 2018).

Four decades later, as the neoliberal globalist trade order of the late 20th century is at its death throes, the chickens have come home to roost in Canada. One bombshell included the firm Stellantis's move to the U.S., amid ongoing trade negotiations between Canada and the U.S. The collapse of Canadian steel exports to the U.S. has significant follow-on affects for the Canadian economy and labour markets (Akbar and Khanzode, 2026). The continental implications have yet to be fully explored, and the Mexico-Canada implications remain ambiguous under the current CUSMA renegotiaton. Nevertheless, steel is required for the infrastructural projects discussed further below —whether to transport hydrocarbons via pipelines, assembling "transition" energy projects requiring "critical minerals," or to build modernized, nominally green transportation infrastructure such as high-speed rails.

Canadian and Mexican Energy and Environmental Policy Amid Uncertain Continental Trade

From the Canadian vantage point, over the past fifteen years, negotiations with Mexico over energy have centered on securing access for Canadian capital to liberalized controls on Mexican energy resources and markets. Mexico, on the other hand, has seen vacillations alongside the partial reassertion of energy sovereignty, first through privatization under the PAN and PRI, and then the reigning in of these processes via the López Obrador and Claudia Sheinbaum Morena governments. During Enrique Peña Nieto's term (2012-2018), the 2013 constitutional and secondary law reforms enabled direct participation by private and foreign companies in the oil, hydrocarbons, and electricity sectors. Although previous governments had carried out a gradual process of denationalization and privatization of the industry, through permits, concessions, public debt, government policies, and reforms to secondary laws, except minor changes they had not dared to touch the Constitution on the matter (Cárdenas, 2014). Via the framework of the 2013 energy reform, the Mexican state-owned company Petróleos Mexicanos (Pemex) underwent a substantial transformation, designated a "productive company of the State"; this was exceptional as it was not considered an entity of the Federal Public Administration. Henceforth, its legal regulation was largely framed by the rules of private (commercial) law.[2] In practice, its legal and operational structure became almost identical to that of a private company, facilitating its insertion into free market logics and deepening commercialization and privatization (Hernández, 2025).

The election of Morena under López Obrador marked a shift from three decades of neoliberalism in the regulation of natural resources. In principle, the so-called AMLO Fourth Transformation has aimed to restore the state's stewardship and sovereignty over oil and energy, again modifying regulatory and institutional policies that favoured the intervention of private and transnational companies (Villanueva and Villanueva, 2020). A 2019 dispute with the firms TC Energy and IE Nova, a subsidiary of the controversial firm Sempra Energy, and partners in the Southern Texas to Tuxpan underwater pipeline project, was in principle resolved in an agreement that year. But Mexican pipeline and energy projects remain subject to complaints by Canada and the U.S. under earlier NAFTA provisions (Trew and Tienhaara, 2024). This is in part due to AMLO's reforms reversing some of the most privatizing aspects of the 2014 restructuring, including that AMLO's Electricity Industry Law (LIE), approved by the

[2] Some exceptions to private commercial law were in made with relation to hiring, goods, budget and remuneration.

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Congress of the Union (*DOF*, 2021). This reform prioritized Mexico's Federal Electricity Commision (CFE) generation plants over those of private producers,[3] although a practical outcome has been further public-private contracts with firms such as TC Energy (TC Energy, 2022).

AMLO's reform was the subject of intense judicial challenges, first in federal courts. Private companies obtained hundreds of injunctions against the new legal provisions, and both specific and general suspensions, claiming that it infringed upon the constitutional principle of free competition (Fundar, 2022). Similarly, the Supreme Court of Justice of the Nation (SCJN) declared it invalid because it violated principles of competition and sustainable development (SCJN, 2024).

Arguably, AMLO's six-year term repositioned the Mexican State in the energy sector through what may be understood as neomercantilist investment in state-supported infrastructure. This included the Olmeca Refinery in Dos Bocas, Tabasco, with construction beginning in 2019, and the 2022 Pemex purchase of the almost 100-year-old Deer Park refinery in Houston, Texas, from Shell's U.S. subsidiary, an acquisition through which Pemex gained full control. Shell first opened the refinery in 1929 and has maintained it in partnership with Pemex since 1993 (Hernández, 2025). Analogously, in 2024, the Mexican government acquired thirteen power plants from the Spanish company Iberdrola, integrating them into the CFE's infrastructure. Through this, the state increased its share of electricity generation to 56 percent, allowing the public sector to exceed the private sector in the proportion it generates of the country's electricity generation that it delivers (Government of Mexico, 2023). CFE's partnerships with Trans Canada Pipelines/TC Energy, with massive financing from Export Development Canada, buttress this nominally public generation, but leave the country beholden to the demands of foreign capital (Ghomeshi and Zalik, 2013; Hernández and Zalik, 2018; Pasternak and Zalik, 2025). Those demands are visible in ongoing Canadian and U.S. NAFTA and CUSMA complaints against Mexico's energy policies.

Supporting these projects, a constitutional reform proposed by AMLO, and ultimately implemented by Sheinbaum, replaced the constitutional concept of State Productive Enterprise with that of State Public Enterprise. This reversed the 2013 constitutional reform, which placed Pemex and CFE under private law, reestablishing their status as State public utilities (Anglés and Bolívar, 2024). The reform also limited private participation in the electricity industry (López, 2024).

President Sheinbaum approved this constitutional reform on October 31, 2024. The government published a suite of energy laws to accompany this reform on March 18,

[3] The legislation also established limits on the so-called clean energy certificates (CELS) and ordered the revocation of self-supply contracts.

2025 (Cacheau et al., 2025), March 18th being highly symbolic of Mexican energy sovereignty in Mexico as it commemorates the expropriation of the foreign oil industry in 1938. Thus, Sheinbaum has continued the pursuit of greater national sovereignty over the energy sector even under persistent tariff threats from U.S. President Donald Trump and violations of the USMCA agreements. Nevertheless, Sheinbaum's handling of the tariff issue has been cautious and firm, "given that the bar for success is negative" (Toosi, 2025), achieving some success where other leaders have failed.

Although less successful in fending off Trump's threats, Canada has seen a parallel mercantilist swing under both Trudeau and Carney liberal governments. Trudeau took office in 2015, promising to improve on the fossil fuel-driven disregard for climate policy that characterized the previous government of conservative Stephen Harper. Coinciding with the first Trump administration, however, Trudeau ultimately protected the oil sector and Canadian pipelines in the face of shifting Trump-led policies.

While various of Trudeau's policies were unpopular in Alberta and other Western oil-producing provinces, the supposedly improved environmental regulatory processes under Trudeau, in fact, continued to offer certainty for fossil fuel expansion (Gilbert and Zalik, 2019). Ultimately, the unprecedented 2019 Canadian federal government purchase of the contentious Kinder Morgan pipeline expansion (the Trans Mountain pipeline), opposed by Indigenous activists, the British Columbia government, and environmentalists, was telling. It underlined, we assert, how the CUSMA agreement simultaneously cemented North American energy integration and a mercantilist approach to resources (Hernández and Zalik, 2024). As these events unfolded, Canada (and Mexico) experienced their opening initial tariff war during the first Trump administration. Those disputes were in part resolved in the renegotiation of NAFTA, resulting in the first CUSMA agreement. By the end of the Trudeau government, Trump's dislike for Trudeau (and vice versa), as well as Foreign Affairs and Deputy Prime Minister Chrystia Freeland, had become openly apparent (Blanchfield and Allan, 2024).

Throughout the period, the implications of a sovereigntist, mercantilist shift have been evident in the limited activity of the Energy Working Group of the Canada-Mexico partnership,[4] as these relations face conflicts under NAFTA and CUSMA provisions (Trew and Tienhaara, 2024). Energy struggles and green branding are part of a broader transition from neoliberalism to neomercantilism in North American trade relations. The actions and investments of key "mid-stream" energy firms, such as the nominally Canadian firm TC Energy, and Canadian interests in megaprojects, including the Tren Maya, serve to illustrate these trends.

[4] The 2020 summary of the Energy Working Group of the Canada Mexico Partnership notes a "brief" meeting and suggests concerns from both parties over investment conditions and energy sovereignty (Government of Canada, 2022). The most recent posted report (Government of Canada, 2024) indicates that the Energy Working Group *did not* participate in the meeting.

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Controversial Energy Infrastructure and Canadian Capital in Mexico: TC Energy and Tren Maya

TC Energy, formerly TransCanada Pipelines, holds significant power —first in bilateral negotiations between Canada and Mexico, and subsequently continentally—. In the period surrounding the Mexican 2013-2014 constitutional reform, a TransCanada Pipelines representative served as the chair of the Energy subcommittee of the Canada-Mexico Partnership (Hernández and Zalik, 2018; Zalik and Hamilton, 2018).

During this period, TransCanada also began to describe itself as the "single largest Canadian investor in Mexico" as it ramped up its U.S. division to support the fracking boom —notably through a massive pipeline system to export U.S. natural gas to the Mexican energy grid—. In 2020, in the shadow of the early days of the Covid pandemic and the "Shut Down Canada" movement against the then TransCanada pipelines owned Coastal Gas Link pipeline on Wet'suwet'en territory, the company changed its name to TC Energy (Zalik, 2020). While the firm initially touted Mexico as a site where it didn't face the social opposition it met to projects such as Coastal Gas Link and Keystone XL, that soon changed. Significant Indigenous territorial opposition to the TC Energy Tuxpan Tula pipeline in the states of Puebla and Hidalgo successfully halted that project in central Mexico (Ceccam et al., 2021; Patterson, 2023; Acosta, 2024).

Both Mexican and Canadian governments' pursuit of extensive infrastructure in the face of opposition has not abated, however. In January 2023, on the heels of the North American Leaders Summit in Mexico City, the Indigenous Affairs bodies of the Canadian and Mexican governments signed a Memorandum of Understanding (MOU). Its stated objective is to provide "a mechanism for collaboration and engagement in areas of mutual interest" (Acosta and Zalik, 2023). The MOU was signed between the Crown-Indigenous Relations and Northern Affairs Canada (CIRNAC, since renamed CIR) and the National Institute of Indigenous Peoples (INPI) of the United Mexican States. It affirms the rights of Indigenous peoples as enshrined in the UNDRIP and commits to collaboration among countries to strengthen the political, social, and economic development of Indigenous peoples through "the exchange of best practices, information, experiences and knowledge." Notable, however, political collaboration involves "determining strategies and priorities for [Indigenous Peoples'] right to development and the use of their [Indigenous] lands, territories, and resources, in accordance with their own development plans and priorities, and cultural values and norms" (Government of Canada, 2023).

Mexico's Fourth Transformation (4T) agenda, particularly its emphasis on state-led energy and infrastructure development, has been widely criticized by social movements,

especially those with autonomist and Zapatista affiliations. Megaprojects such as the Tren Maya have generated sustained opposition due to their impacts and incursions on Indigenous territories and ecologies (Ceccam, 2022). Coalitions of Indigenous, ecological and social organizations and scholars in the Yucatan region and beyond have denounced the project, stressing a lack of consultation with affected peoples', territories, and communities, opacity of information, inconsistencies in the environmental impact statement, and a conventional approach to tourism development that overlooks diverse livelihoods and social rights of communities (Gasparello et al., 2021; Barabas, 2022). These concerns have also been formalized in a complaint to the continental Commission on Environmental Cooperation, first established under NAFTA (CECC- SEM -22-02).

In spite of this opposition, the Tren Maya was inaugurated in 2024 as a "green" project running over 1500 kilometers across five states, from Yucatán to Chiapas. Promoted by Alstom-Bombardier, a formerly Canadian, now French, railway construction company, as a catalyst for sustainable development and regional growth (Alstom, 2021), the project is framed by both the Mexican government and corporate actors as socially and economically transformative. Yet beneath this rhetoric lies a contradictory reality: the mega-train project serves as a tourist attraction during the day, and as part of a freight-train network at night. It forms part of long-standing geopolitical infrastructure rooted in extractivist relations, the expropriation of communal lands, and intensified border enforcement designed to limit cross-border migration often disregarding social, environmental, and human rights.

These dynamics are reinforced by Canadian and U.S. investment and policy influence. Along with other so-called green projects, including TC Energy pipelines, the Tren Maya is at the center of the "new" Canada-Mexico Action Plan, which prioritizes infrastructure, energy, and border security (Government of Canada, 2025). With Trump back in office, "[a]ll of the leaders in Canada are interested in exploring ways to strengthen our relationship with Mexico," said Alberta's conservative Premier, Danielle Smith, during a visit to Mexico in August 2025 (Vásquez, 2025). Meanwhile, critics of the Tren Maya call it "el tren de las elites" (the elites' train), viewing it as part of a move toward creating a "new southern frontier," which restricts the movement of those seeking protection and displaces local communities from their lands in the interests of elites (Flores et al., 2019; Sipaz, 2020; PODER, 2024).

As we have discussed, the global shift toward neomercantilism involves a connection between increasingly protectionist yet outsourced bordering practices to control the movement of unwelcome people alongside ongoing resource extraction, dispossession, and exploitation —all aimed at strengthening national economic power—. This nexus, often disguised as development, not only controls cross-border migration

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to serve global capital but also perpetuates historical exclusion and socioracial hierarchies central to capitalist economies (Andersson, 2014; Bhagat, 2024; Federici, 1999). To lubricate neomercantilism, there must also be (transit) states willing or compelled to act as geographic and geopolitical extensions of other, often global North, states' sovereignty and interests.

Although President AMLO formally declared in 2019 that the neoliberal economic model had ended in Mexico and dismantled Special Economic Zones created by his predecessor, Peña Nieto, similar mechanisms have re-emerged under new branding as "Development Poles for Wellbeing" in the blueprints of the Tren Maya and other mega projects (Lujambio et al., 2025). This strategy is framed as strengthening Mexico's economy through nearshoring, and relocating factories closer to the U.S. market, echoing the maquiladora model (Pérez, 2020; Wright, 2026). Free trade zones in southern Mexico, equipped with specialized infrastructure and streamlined administrative processes, offer tax breaks to companies investing in key sectors such as semiconductors, pharmaceuticals, medical devices, auto parts, renewable energy, petrochemicals, metals, and agriculture (Paley, 2024).

While Trump's rhetoric encourages locating jobs in the U.S., given Sheinbaum's aforementioned negotiations, the precarious work at the southern border is either less easily quantified, or spared the worst impacts of Trump's threats given that it hosts jobs lower on the supply chain. Sheinbaum's commitments to enhanced security and border policing seem to have shielded Mexico from the worst of Trumps' antics, even as employment in the Canadian auto and semiconductor sector have plummeted.

At the same time, increasingly restrictive U.S. and Canadian migration policies — signaling the influence of far-right and arguably neo-fascist, natalist discourse on border security— have intensified migrant precarity. This has been redoubled by Trump's use of section 212(f) of the Immigration and Nationality Act to "suspend the entry" of noncitizens into the U.S., expanded deportations, and ICE's activities across the U.S. in 2026. In combination with Canada's controversial introduction of the Strong Borders Act, Bills C-2 and C-12, this contributes to the prolonged settlement of migrants in southern Mexico under highly precarious conditions (Biorklund and Hyndman, 2024; Howitt, 2026; Woolf, 2025).[5] Infrastructure development is thus closely tied to labour and displacement. Large-scale projects have forcibly dislocated Indigenous and agrarian communities from their lands, creating both a demand for and a supply of a precarious workforce, especially following the 2013 energy reform (Arroyo and Zalik, 2016). Migrants, often with insecure legal status, are incorporated

[5] Bill C-12 has passed to the Canadian Senate without sufficient review, a process condemned not only by migrant rights associations but also by the Canadian Bar Association (Howitt, 2026) for granting the immigration minister sweeping power to cancel existing visas and applications.

into these labor regimes, illustrating the dynamics of competition for employment and the classic expansion of the reserve army of wage labour.

Foreign investment, particularly from the U.S. and Canada, plays a central role in enabling these processes. Such investment, with a large extension of capital through institutions like Export Development Canada, is frequently accompanied by pressures to "de-risk" and secure investment, including border enforcement aimed at buttressing "Mexico's role in managing northbound migration flows" (Biorklund and Ferguson, 2021; Hiemstra, 2019; Villa and Sacristán-Roy, 2013).[6]

Export Development Canada (EDC) has made significant investments in Mexico: $2.3 billion CAD in the estimated $20 billion Tren Maya project, as well as EDC support for other Mexican megaprojects like the Dos Bocas oil refinery in Tabasco and the Isthmus of Tehuantepec Interoceanic Corridor (CIIT). TC Energy has also received extensive support through EDC and is likely one of EDC's largest clients (Pasternak and Zalik, 2025; Ghomeshi and Zalik, 2013).

Both Dos Bocas and the CIIT are connected to TC Energy's most recently announced pipeline, the Southeast Gateway. Connecting to the South Texas Tuxpan pipeline, the Southeast gateway will move U.S. natural gas south to both the Coatzacoalcos petrochemical complex and the Dos Bocas refinery, and forms part of the firm's broader Southeast Expansion project connecting to the Yucatan peninsula. In the case of the CIIT, a reformed railway for container transport is under construction between the Gulf of Mexico and the Pacific coast to increase exports to Asian, European, U.S., and Canadian markets. The Tren Maya and the CIIT will meet in Palenque, Chiapas, linking to Coatzacoalcos, Veracruz, which will serve as the central logistics hub. The key stations for both rail projects are strategically located near critical industrial areas focused on resource extraction and merchandise production, including some of the "Development Poles" established along the southern border.

These infrastructure corridors also overlap with key migratory routes. Increased militarization in southern Mexico, particularly since 2025, has constrained mobility, leading many migrants to remain in these regions, where they are absorbed into precarious markets. In this sense, megaprojects function not only as economic initiatives but also as mechanisms of migration control (Prieto, 2021).

Although interoceanic connectivity has been a long-term national goal, its current articulation under the 4T reflects a convergence of development, security, and migration management. This vision remains "secure" with Sheinbaum, despite widespread environmental impacts, including the overuse and privatization of water,

[6] Examples include the Plan Puebla Panamá in 2001, the Plan Programa Frontera Sur (the Southern Border Program) in 2014, and Quédate en México (Remain in Mexico) in 2017, and most recent CUSMA agreement.

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and the endangerment of archaeological sites, as well as issues related to violence and violations of territorial and social rights among campesinos, often Indigenous (Ansótegui, 2021). López Obrador explicitly framed these projects as a tool to reduce northbound migration by generating local employment (*Expansión*, 2018). This logic has been reiterated in national development plans (2019 and 2024) describing the Tren Maya, the CIIT, and other infrastructure as a "curtain" against migration (*Expansión*, 2018). Using development projects to control movement is reinforced by the growing role of the armed forces in securing investment zones and managing territorial control (Prieto, 2021). As critics argue, these megaprojects function as an extension of the border southward. The Mexican scholar Sergio Prieto Díaz notes, "There is a train, there's a highway, there's a gas pipeline, and other projects on the way. Trump's wall will get built, but not along the southern U.S. border. It is being built in southern Mexico" (Prieto in Paley, 2024).

Conclusion: Neomercantilism and the Threat of Fascism

In September 2025, Canadian Prime Minister Carney and President Sheinbaum met in Ottawa. Carney's speech at that meeting included several key differences from the previous Canada-Mexico Action Plan, as noted by CCPA Trade analyst Stuart Trew (2025): "The old plan didn't talk about fossil fuels, the new plan seems to front them"[7] (new gas infrastructure, for example). Another difference, the Trudeau plan fronted cooperation on corporate fraud and improving justice system outcomes for women and children, while Carney underlines fighting fentanyl trade and migration, Trump priorities.

Trump has repeatedly named energy resources, notably the balance of trade between Canada and the U.S., as a significant problem. The Tren Maya project's position in continental trade dynamics and TC Energy's relationship with all three North American governments are emblematic of the shift from neoliberalism to neomercantilism. Both TC Energy and Alstom supply infrastructure branded as "green" energy, in the case of TC Energy's delivery of fracked U.S. gas; or transportation, in the case of Alstom's delivery of parts for high-speed rail. However, both firms' activities have sparked controversy given their impacts on the environment and Indigenous rights in Mexico. Both the Tren Maya project and TC Energy's business model have capitalized on moves toward economic nationalism.

[7] Personal communication of Stuart Trew to the Trade and Investment Research Project list-serve, September 18, 2025.

While two decades earlier, both Canadian and Mexican oil were "fueling fortress America" (McCullum, 2006), the U.S. fracking boom transformed that dynamic, turning the country into an energy superpower (Zalik, 2022). Still, Carney and Trump have discussed the revival of the controversial TC Energy Keystone Pipeline, canceled under both the Obama and Biden administrations. This project, which would deepen Canadian energy exports to the U.S., seems to contradict Trump's concerns about Canada's net energy exports to the U.S. But the U.S. Gulf refineries, built to process Canadian and Mexican heavy oil, have spare capacity. Transporting these fuels to the American oil heartland boosts American petrochemical jobs, utilizes existing capital, and retains value added in the U.S. These are key attributes of extractive relations and what the Canadian scholars Harold Innis and Mel Watkins have referred to as the "staples" trap (Stanford, 2020). Thus, Canadian and Mexican hydrocarbon exports to the U.S. remain geostrategic, even under neomercantilism. Skyrocketing oil prices due to the war in Iran may further incentivize exorcising the Keystone XL.

In the context of the North American setting, we have argued, the nexus of extractive resources/infrastructure and cross-border migration management is central to, and illustrates the contradictions within, this neomercantilist "transition." We discern the contours of this transition through changes in energy policies and strategies promoted by both Morena in Mexico and the Liberals in Canada, as well as in the nexus of infrastructural projects and restrictive migration management in Mexico. Although neomercantilism suggests a protectionist rather than liberal approach to market relations, major projects compatible with neomercantilism do little to shield states from, or undo, the political-ecological contradictions associated with late neoliberal capitalism. Both the Tren Maya and TC Energy built infrastructure, along with other megaprojects, entail the further commodification of labour and resources, prompting further conflicts with Indigenous sovereignty and environmental justice movements over territory and ecology.

In the last two years, the market turmoil prompted by Trump's tariff and wars on Venezuela and Iran have yielded significant windfalls for market speculators (Almeida, 2025; Faturechi et al., 2025; Steer et al., 2026). The bowing of Tech Capital to Trump —the renaming of the Gulf of Mexico as Gulf of America, a blatant example— led Canadian academic, Joel Westheimer (2025), to point out that "plutocrats share their own set of norms that privilege shareholder value, political expediency and the maintenance of their unparalleled influence. These norms, values, and perceptions of what is acceptable behavior are shaped not by the needs of democracy or society, but by the insulated, self-reinforcing logic of their own milieu —a logic wherein bowing to a fascist seems reasonable, even admirable."

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A year later, a haphazard decision to declare war on Iran has prompted chaos in global energy markets. Here again, the business pages of newspapers like the *Financial Times* document how volatility, instability and war deliver significant returns to large oil and gas firms, incentivize new exploration and production, and furnish new federal military contracts to weapons suppliers, including a drone company recently acquired by Trump's sons (Smyth and Moore, 2026; Steer, 2026). Neomercantilism in North America and beyond is clearly and unfortunately compatible with a sociopolitically (Chazan, 2026a; 2026b) exclusionary definition of "nationhood" —with clear neo-fascist elements. These include government policies, actions, and discourses stemming from a supremacist vision employing violence, exclusion, and extreme mistreatment of people based on such social categories as class, gender, ethnicity, origin, and conditions arising from broader political economic displacement and inherent crises of capitalism.

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