



# *Editorial*

UNIDAD DE ANÁLISIS POLÍTICO Y SEGURIDAD CORPORATIVA

## ANALYSIS OF THE CURRENT SITUATION

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The impact of the US Navy fleet's movement into Iranian waters

### REGIONAL

The expansion of the Aragua Train in the Americas

### LOCAL

What are the electoral prospects for the 2026 presidential election?

## The impact of the US Navy fleet's movement into Iranian waters

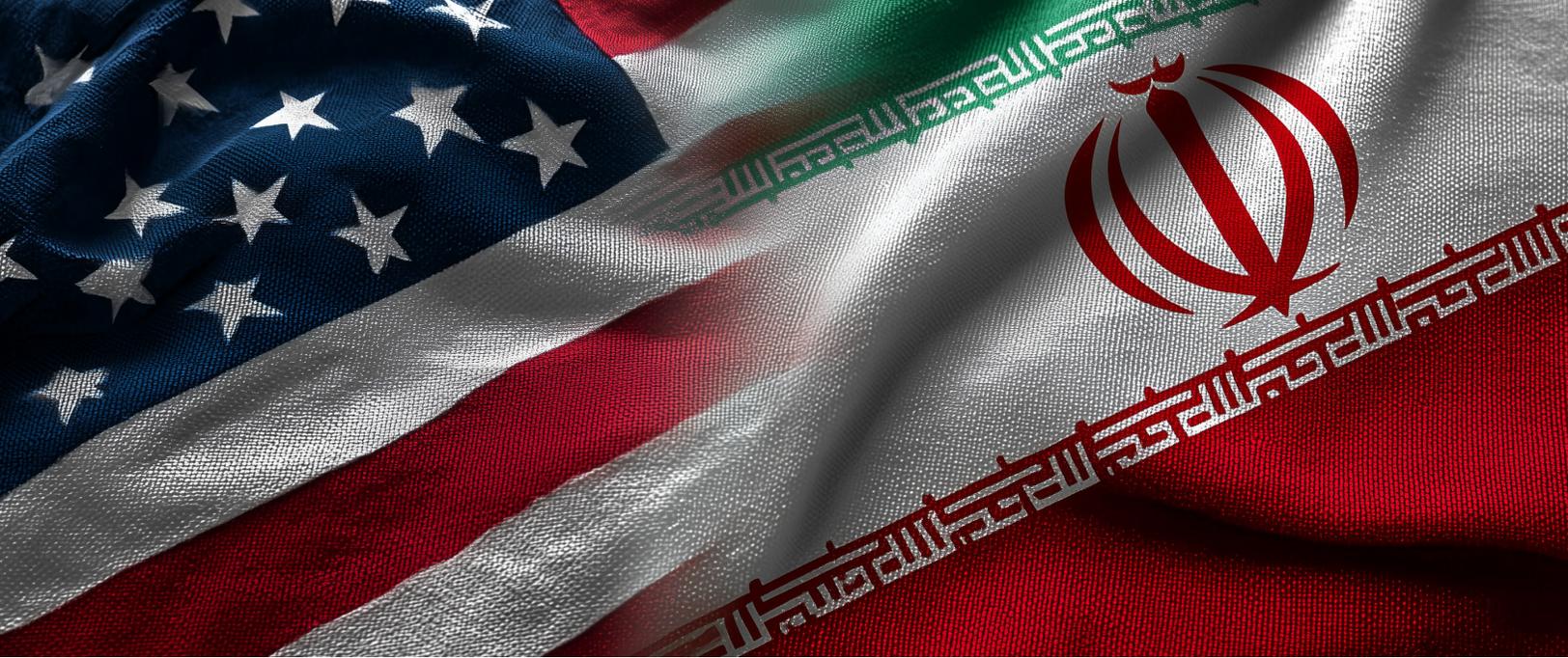
The recent movement of the US Navy fleet into waters near Iran has a significant strategic impact, as it constitutes an explicit show of force that increases military and political pressure on Tehran.

The arrival of the aircraft carrier USS Abraham Lincoln, accompanied by destroyers and combat aircraft, increases the offensive and defensive capabilities of the US in the region, sending a clear message of deterrence in the middle of escalating tensions, in a context in which Washington has warned that it has a “massive navy” ready to act if diplomatic efforts fail.

In addition, the social discomfort, mobilizations and strikes have put Iran under greater geopolitical pressure, as it is within the operational range of a fleet capable of carrying out precision strikes and sustaining prolonged operations without relying on regional bases.

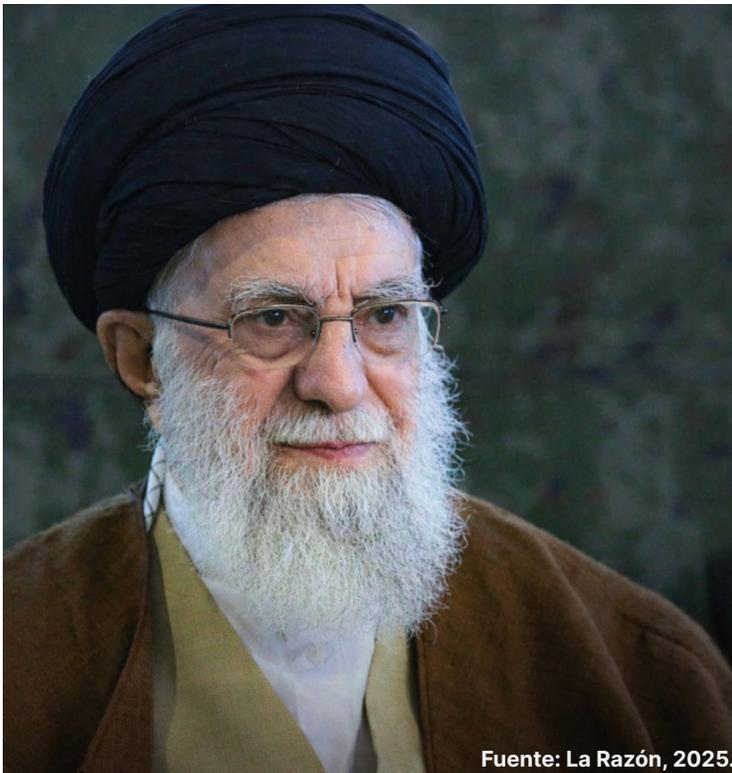


This deployment has generated internal unease in Iran, whose leaders recognize that the US naval presence, which has also been reinforced by military exercises and aerial surveillance, could be a prelude to an attack aimed not only at strategic targets, but even at destabilizing its political leadership amid an internal crisis marked by mass protests (Euro News, 2026).



**T**here are indications that the US, together with the Israeli Air Force, has sufficient firepower to launch an attack designed to overthrow the Iranian government, not just to damage military or nuclear facilities—perhaps in an event like January 3rd in Caracas, albeit with less incentive for stability in the country.

Mass protests in Iran and political instability have created an environment where Israel is perceived as an actor willing to take advantage of the regime's internal weakness to support a US offensive, especially in a context where both governments share objectives of military containment and diplomatic pressure on Tehran ([Digital Plural, 2026](#)).



Fuente: La Razón, 2025.

The tension has had visible economic effects, such as the record fall of the Iranian stock market, which has forced the government to adopt a stance of resistance, insisting that it will not yield to external pressure even amid accelerating inflation and social crisis

**Trump gave Iran the same proposal he gave Maduro: step down or be overthrown.**



This type of response seeks to project strength and prevent the population from interpreting the US-Israeli deployment as an inevitable prelude to state collapse.

Given that Iran has previously sent speedboats to harass commercial vessels and deployed drones over the area—actions already repelled by the US in recent weeks—it is foreseeable that maritime pressure and demonstrations of force in Hormuz will increase in response to the expanded naval presence.

Overall, naval movements increase the risk of misinterpretation, heighten regional volatility, and place both sides in a dynamic where any incident—such as the shooting down of drones or the harassment of commercial vessels—could quickly escalate into open conflict. Likewise, for companies and commodity markets, the message transcends politics, combining elements of human rights, military pressure, and nuclear negotiations into a single strategic signal, a mix that typically increases volatility and raises the cost of risk hedging ([Redimin, 2026](#)).



## The expansion of the Aragua Train in the Americas

**T**he Aragua Train can no longer be understood as an expanding Venezuelan megaband, but rather as a transnational criminal architecture with the capacity for territorial replication and illicit governance in multiple countries across the continent.

Its evolution from the Tocarón prison to a network operating in at least nine Latin American countries—with ramifications in the United States and Spain—reveals an adaptable criminal franchise model: cells with operational autonomy, hierarchical discipline, and a diversified portfolio of crimes.

This is not just a matter of migratory mobility, but rather a strategy of insertion into pre-existing illegal economies—micro trafficking, human trafficking, extortion, and arms trafficking—accompanied by exemplary violence designed to consolidate territorial control and deter competitors.

Mexico has acknowledged its presence in at least 11 states, operating through alliances with local structures such as Unión Tepito, confirming that the group prioritizes co-optation and criminal symbiosis over open confrontation when the environment demands it.



Colombia clearly illustrates the level of sophistication achieved. In November 2025, the kidnapping and torture of the mayor of Chimichagua in a car wash in Soacha—converted into a clandestine detention center—revealed the existence of “torture houses” on the outskirts of Bogotá, where victims were recorded, beaten, and used for million-dollar extortion schemes.

The subsequent capture in January 2026 of alias “Carlitos” and the dismantling of cells linked to micro trafficking and grenade explosions in tolerance zones reveal a scheme with defined command, control of urban economies, and armed logistical capacity. At the same time, the arrest in Necoclí, on January 28, 2026, of Indira Enyiver Carrera (“La Diabla”), wanted by Peru for human trafficking and sexual exploitation, confirmed that Colombia functions both as an operational base and a strategic corridor within a network that links irregular migration, cross-border sexual exploitation, and extortion ([El Colombiano, 2026](#)).

Chile offers one of the most striking examples of structural penetration. Between 2022 and 2023, the cell known as “La Compañía – G4 – La Casa,” led from abroad by Larry “Changa,” consolidated a distribution network of more than 300 kilograms of marijuana and cocaine from Tarapacá to the center of the country, using commercial premises as a front and also participating in high-impact armed robberies—such as the assault on a plot of land in the Maule Region where they stole 35 million pesos after deactivating cameras and threatening with firearms—([Biobio Chile, 2026](#)).

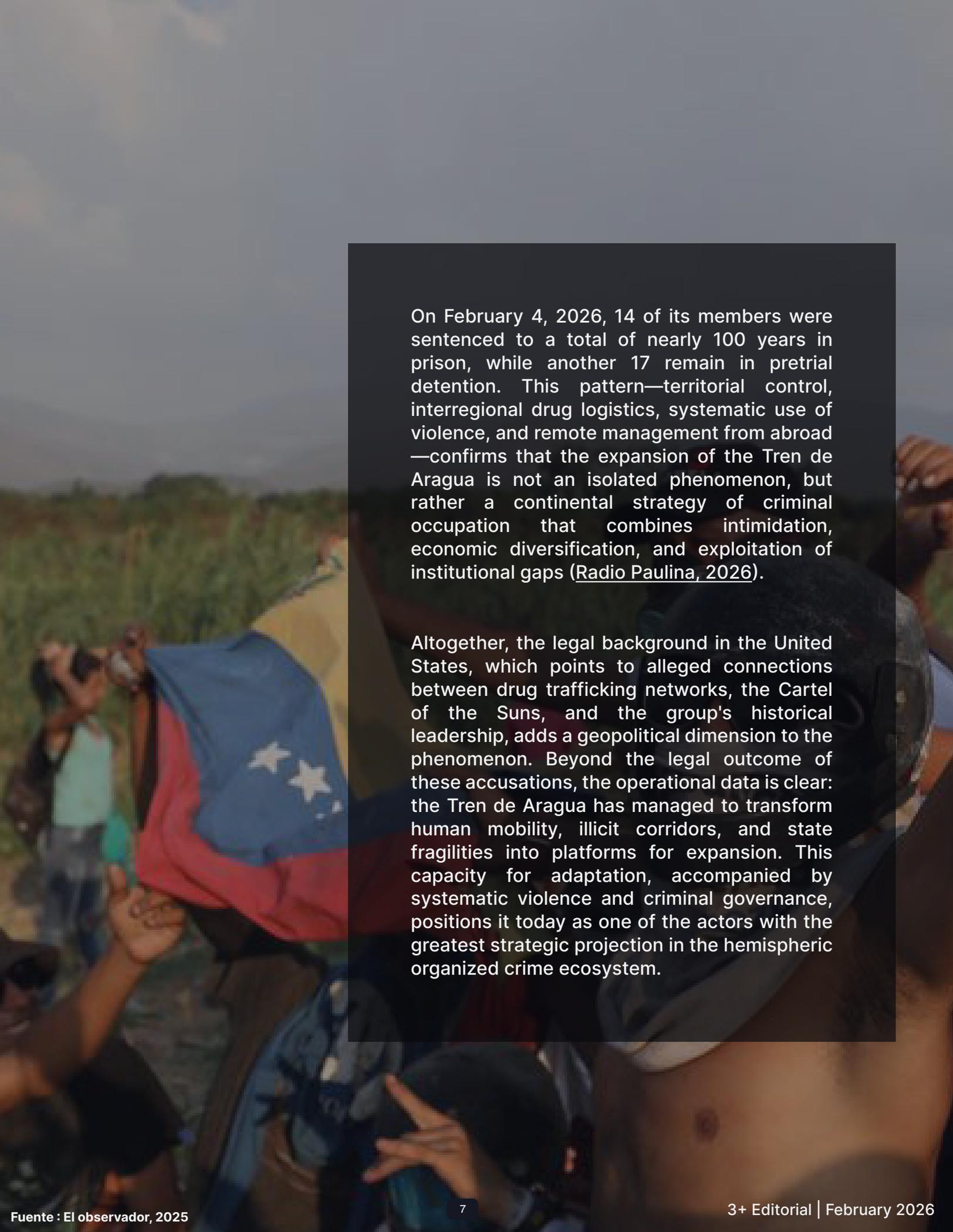
**The Tren de Aragua has transformed human mobility and state fragilities into platforms for criminal expansion.**

Strategic anticipation will be the key competitive advantage in 2026.

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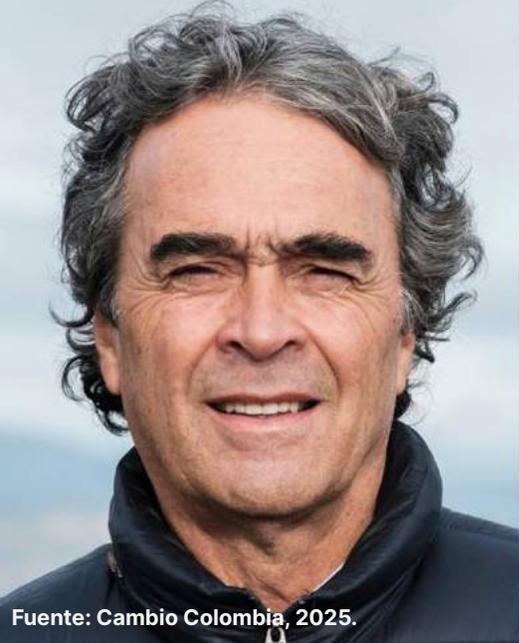
On February 4, 2026, 14 of its members were sentenced to a total of nearly 100 years in prison, while another 17 remain in pretrial detention. This pattern—territorial control, interregional drug logistics, systematic use of violence, and remote management from abroad—confirms that the expansion of the Tren de Aragua is not an isolated phenomenon, but rather a continental strategy of criminal occupation that combines intimidation, economic diversification, and exploitation of institutional gaps ([Radio Paulina, 2026](#)).

Altogether, the legal background in the United States, which points to alleged connections between drug trafficking networks, the Cartel of the Suns, and the group's historical leadership, adds a geopolitical dimension to the phenomenon. Beyond the legal outcome of these accusations, the operational data is clear: the Tren de Aragua has managed to transform human mobility, illicit corridors, and state fragilities into platforms for expansion. This capacity for adaptation, accompanied by systematic violence and criminal governance, positions it today as one of the actors with the greatest strategic projection in the hemispheric organized crime ecosystem.

## What are the electoral prospects for the 2026 presidential election?

**T**he 2026 presidential election in Colombia is taking place in a highly competitive, fragmented environment with significant levels of uncertainty.

On the one hand, when looking at the most recent public opinion polls, the race seems clearly dominated by two disparate forces: Iván Cepeda on the left and Abelardo de la Espriella on the right. Both are technically tied in most voting intention polls. For example, the Atlas Intel poll shows De la Espriella winning with 32.1%, while Cepeda has 31.4% for February 2026, with a statistically insignificant difference. Other polls, such as Invamer, confirm this tie, placing both candidates in a range between 28% and 32% support, and showing the third candidate, Sergio Fajardo, at around 7-8%, far behind the front runners in the polls [\(Caracol, 2026\)](#).



Therefore, the Political Analysis and Corporate Security Unit at 3+ Security Colombia generated a statistical model using the Monte Carlo methodology, which runs scenarios of structural voter behavior, taking data from polls and adding the sensitivity of undecided or swing voters, offering a somewhat different interpretation. This is because the current political system would place Sergio Fajardo as the winner in more than 30% of the simulations, far surpassing Cepeda and de la Espriella, who win in less than a quarter of the scenarios presented. Although these differences do not necessarily reflect a contradiction, they do reveal the coexistence of two dimensions of electoral analysis. On the one hand, there is the current picture captured by opinion polls and, on the other, the structural potential of the political system, beyond the dynamics of rejection or affinity of a particular electorate, especially if certain conditions that are fundamentally ignored in the polls are activated. This is crucial given that the undecided vote remains between 6 and 8% and is a volatile electorate that could redefine the contest depending on the direction of the campaigns and the political environment.

Furthermore, both models agree that, in a second-round scenario, Fajardo would be highly competitive against both extremes and, although he does not dominate current voting intentions, his potential ceiling is high and his rejection level is relatively low, allowing him to capture the intermediate voter when the elections move toward the extremes. In fact, radical positions such as those of Cepeda or De la Espriella—which are strong in the polls—are subject to factors that could limit their growth: electoral fragmentation, which is historic and is evident today with 22 presidential candidates, almost double the number four years ago; and generational and economic polarization, leaving the extremes with firm but segmented bases, which means that opinion polls capture less of the reality of the system. In concrete terms, this could also represent an electoral surprise for many, with Sergio Fajardo leading this third way in the 2026 electoral landscape.

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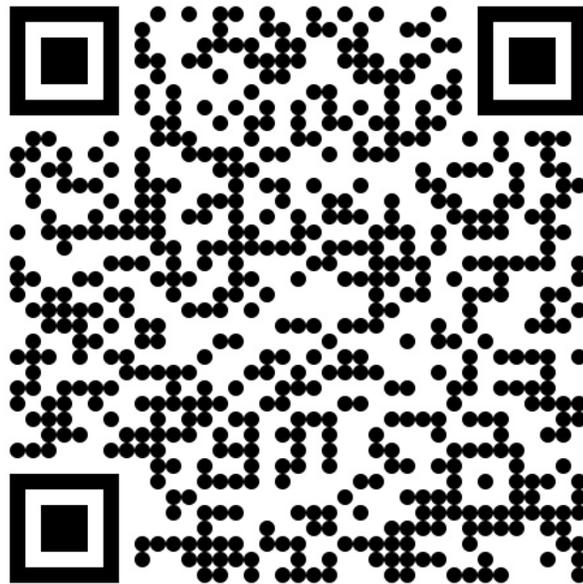
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