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CHAPTER 8

Mexico's 2018 Tsunami-Alternation: Change and Continuities Following the Collapse of the Transitional Three-Party System

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8.1 Mexico's 2018 Alternation from a Sociohistorical and Comparative Perspective

The concept of *alternation* is key to assessing the democratic—or authoritarian—character of a political regime. To paraphrase Adam Przeworski (2010): in a democracy, incumbent governments that lose elections accept their defeats. Moreover, winners emerge with the sovereign mandate of the People to implement alternative policies and to respect the rules that

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allowed them to be elected, so there can be other regular alternations in the future.

How can Mexico's 2018 alternation be interpreted within the general context of Latin America and the distinctive history of its national politics? From a comparative perspective, the landslide victory of Andrés Manuel López Obrador (AMLO) represents a belated and counter-cyclical shift to the left coming 20 years after Hugo Chávez's first election in Venezuela. At first sight, the change could hardly be more radical. In the typology that Dabène constructs to synthesize the cases that comprise this collective work, Mexico registers the highest score of alternation.

From a regional perspective, this time lag is comprehensible because the Mexican transition was singularly slow and progressive: it began in the mid-1970s, gradually passing through a series of municipal and state alternations until finally resulting in the defeat of the official party in the legislative elections of 1997 and the presidential elections of 2000 (Becerra et al. 2000; Gómez Tagle 2001; Domínguez and Lawson 2004; Loaeza 2008). Within the Mexican political process, however, the numerous local and national alternations of 2018 form part of a remarkable historical continuity: they represent an additional stage of a broader trajectory of political disintegration. They are the result of the fragmentation of the post-revolutionary family, the erosion of its legendary electoral machinery and the collapse of the transitional three-party system following a prolonged passage from one hegemonic party regime to another, more pluralistic and volatile one, despite its apparent stability and consolidation (Sonnleitner 2018).

This third democratic presidential alternation contrasts with the first—inaugural and transitional—of 2000. That election confirmed that the official party, defeated at the polls, was willing to hand over Executive power peacefully. Eighteen years later, for the first time, no party contested the results and the incumbent government's candidate conceded defeat minutes after the polls closed. Oddly enough, subsequent elections have continued to be contested by many losing aspirants, even when their own parties did control the offices at stake.

López Obrador's election also recalls some features of the second presidential alternation of 2012, when Enrique Peña Nieto sought to restore the post-revolutionary pact with a supposedly renovated PRI. Despite presenting itself as a radical rupture, some objectives of the "Fourth Transformation" that emerged from the polls in 2018 are anchored in the nostalgia of that same golden age and seek to restitute the strong

and centralizing Presidency of the authoritarian past. Far from being an outsider, AMLO is one of the last representatives of revolutionary nationalism, a genuine insider formed in the culture of the *Ancien Régime*.

In a historical perspective, the alternations of 2018 are paradoxical. Under the reign of the hegemonic party, there were no competitive elections and PRI candidates simply could not lose. Elections were not held to select them since their designation was made through internal party mechanisms. These were "elections without choice", whose function was to introduce and legitimize the new leaders (Hermet et al. 1978). And yet, during that period informal mechanisms of alternation operated within the PRI and guaranteed the regular rotation of party elites through the legal prohibition of re-election.

These practices seemed to have been overcome. In recent decades, elections have become competitive and, under the combined effects of increasing volatility and party fragmentation, the number of alternations has not ceased to rise. In sharp contrast with the United States, where representatives running for re-election have a clear incumbency advantage, in Mexico alternations now predominate at all levels of institutional power. After being banned in 1933, the re-election of legislators and mayors was re-authorized in 2014. At the municipal level, these reforms came into force in 2015 and, since then, seven out of 10 local office-holders who have sought re-election have been rejected by the electorate. For federal lawmakers, the reforms only applied to those who were elected in 2018. In 2021, 449 of the 500 deputies sought to stay in office but only 213 met the requirements and just 139 obtained re-election (Valencia Escamilla 2022). In many cases, these alternations reveal a clear vote of repudiation.

The 2018 presidential election can also be interpreted as the product of a massive vote rejecting the governing parties. It was transferred in part to a newly created party, and to the candidate who was able to embody the hope for change. As this chapter shows, AMLO's victory would appear to be a radical alternation that spelled the demise of the three-party system that had structured Mexican politics since the democratic transition. Peña Nieto's administration resulted in a radical reconfiguration of these parties. The *Movimiento Regeneración Nacional* (National Regeneration Movement, or MORENA), in turn, benefitted from the widespread dissatisfaction with the ruling elites that translated into a pivotal vote of

repudiation. However, this reading conceals many elements of continuity essential to understanding the essence of the Mexican case.

With a socio-territorial approach, this chapter analyses three processes that converged to produce a new political map: beginning with a discussion of the most profound changes in order to situate the reconfiguration of political forces, we then explore the ruptures, negotiations and reconfigurations of the national and regional party elites, before analysing split ticket voting and the new electoral geography.[1] Lastly, subsequent elections make it possible to assess the effects of the tsunami, the structural strength of the new ruling coalition, and the remnants of the party system that emerged from democratization.

8.2   A Tsunami Called AMLO

Announced months in advance, AMLO's triumph was nonetheless a surprise by its margin of victory. Like a tsunami, his coalition Juntos Haremos Historia (Together We Will Make History) swept the rival coalitions Por México al Frente (For Mexico to the Front) and Todos por México (Everyone for Mexico), headed by a long-time PAN party member (Ricardo Anaya Cortés) and by a technocrat with no party affiliation (José Antonio Meade Kuribreña), who displaced the PRI party contenders.[2] The independent candidacy of Nuevo León's

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[1] This chapter was elaborated for this collective book. It is based on ongoing and previous research, that has been partly published (Sonnleitner 2020). Methodologically, it relies on case studies, on the pre-electoral survey performed by Berumen and Ipsos in June 2018 and on spatial analysis at the level of the 32 states and the 300 federal legislative districts. The survey is available at: https://www.ine.mx/voto-y-elecciones/encuestas-ele ctorales/elecciones-federales-ordinarias-2017-2018-estudios-entregados/berumen-2/ (last consulted: May 20, 2019). For statistical analysis we use the official results published by the electoral authorities available at: http://www.ine.mx/voto-y-elecciones/resultados-electorales/ (last consulted: July 17, 2021). Enhancements for this chapter are available online and include maps of the emerging Mexican electoral geography, additional figures and analysis on volatility and vote transfers.

[2] Juntos Haremos Historia was formed by MORENA, the Partido del Trabajo [Labor Party, PT] and the Partido Encuentro Social [Social Encounter Party, PES]. POR MÉXICO AL FRENTE comprised of the Partido de Acción Nacional [National Action Party, PAN], Movimiento Ciudadano [Citizen's Movement, MC] and the Partido de la Revolución Democrática [Party of the Democratic Revolution, PRD]. TODOS POR MÉXICO consisted of the Partido Revolucionario Institucional [Institutional Revolutionary Party, PRI], the Partido Verde Ecologista de México [Green Party of Mexico, PVEM] and the Nueva Alianza [New Alliance, PANAL].

governor, Jaime Rodríguez Calderón ("El Bronco"), was relegated to a distant fourth place.

The metaphor of the *tsunami*, which others have conceptualized as a *landslide* (Moreno 2019), captures the exceptional and unexpected, massive and disruptive effect that López Obrador's third campaign had in the presidential elections. With 30 million voters, his candidacy captured 54.8% of the valid vote, surpassing Anaya by 32 percentage points and the candidate of the outgoing government by 38 percentage points (Meade obtained barely 16.9%).[3]

For thirty years, Mexican politics had been structured around three parties that captured 90% of the vote, with stable bases in different territories and with lasting identities among broad segments of the electorate. This three-party system had begun to erode in 2009 but did not collapse until 2018. Having garnered 82.7% of the vote in the presidential elections of 2012, the PRI, the PAN and the PRD lost the support of six out of 10 voters and held barely 35.1% in the presidential elections of 2018. Carried by an overpowering wave of discontent, MORENA asserted itself as the primary force, going from 7.8% in 2015 to 37.8% in the legislative elections, while AMLO won the presidential elections in 31 of the 32 states and 267 of the 300 federal districts, leading to the demise of the tripartisanship that had structured Mexican politics since 1991.

However, the 2018 elections cannot be reduced to the coalition of discontents that rallied around the leadership of the newly elected president. In them, 18,311 positions were contested, starting with nine governorships, followed by the seats in Congress and 27 local legislatures, as well as 1612 municipalities. Our interest in investigating the origins and structural effects of these atypical elections on the Mexican political process derives from this complexity.

Enrique Peña Nieto's presidency resulted in a radical reconfiguration of political forces. In 2012, his election was interpreted as a "restoration" of the PRI, a party supposedly renovated by a group of young politicians unified under the leadership of the then-governor of the State of Mexico. However, his administration resumed many practices of the past, fuelling

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[3] In the media, it is commonly said that AMLO won the presidential election "with 53% of the vote". As summarized in Table 1, he obtained 30 million votes in 2018, that is, 53.2% of the total votes and 54.8% of the valid votes cast. In this chapter we distinguish between the two and privilege the use of valid vote percentages, as is customary in academic electoral analysis.

frustration at first, then alienating some of its sympathizers and ultimately spurring the open rejection of broad sectors of society. In the electorate, this was reflected in a late but marked decline, not only of the PRI but of the set of parties that had governed the country over the last three decades.

To begin with, voter turnout was not exceptional at the national level. At 63.6%, it was situated between the 77.1% reached in the 1994 presidential elections and 58.6% in 2006, at levels almost identical to those recorded in 2000 (63.9%) and 2012 (63.1%). There were markedly participatory entities that had always been characterized by high voting rates (such as Yucatán, Campeche, and Mexico City, where participation reached 77%, 71.3%, and 71.1% in 2018). At the same time, there were also traditionally abstentionist entities with very low rates of participation (such as Baja California and Chihuahua, with only 52.5% and 54.7% participation).

However, there were also changes that broke with the usual patterns of electoral mobilization. Among them, the decrease in participation in Guanajuato and Sonora (where it fell below 54%), as well as the increased participation in traditionally abstentionist states, particularly in Guerrero (64.3%), Oaxaca (65.9%), Chiapas (68.2%), and Puebla (69.4%), are notable. The reconfiguration of the partisan forces was of a structural nature and accompanied by new subnational dynamics of electoral mobilization.

Secondly, party fragmentation was attenuated but did not disappear, going from 5.7 effective parties in the legislative elections of 2015 to 4.4 effective parties in those of 2018. Despite the coattails effect and the negative campaigns, the contest did not polarize voters into two opposing camps but rather developed in various multiparty formats, in the midst of a more complex reconfiguration of political options. It would therefore be a mistake to speak of the emergence of a new hegemonic or dominant party. It is impressive that AMLO effectively obtained a higher percentage than any of his five predecessors, including Carlos Salinas in 1988 (50.4%). But despite its ability to attract a myriad of disenchanted voters in the presidential elections, MORENA only obtained 38.7% in the legislative contest, mobilizing 24.5% of registered voters.

In addition to the presidency, thanks to the split-ticket of millions of disaffiliated voters and a complex strategy of alliances with the PT and the PES, the national and regional candidates of Juntos Haremos Historia won Mexico City and four of the eight governorships in

dispute; 57 of the 128 Senate seats and 252 of the 500 seats in Congress. Yet, at the municipal level MORENA only conquered 142 mayoralties (which, thanks to the coalitions formed in 2015, allowed it to govern 335 of the 2449 municipalities from that point forward).

Even so, MORENA's victory was decisive. In addition to the personal defeats of Anaya and Meade in the presidential elections, both the PAN (18.7%) and the PRI (17.2%), but especially the PRD (5.5%), hit rock bottom in the legislative elections. The weakness of the PANAL and the PES was also evident (neither of them reached the threshold of 3% and both lost their legal registration), as well as the geographical concentration of the PVEM, the MC and the PT (which, despite their local influence, barely garnered 5%, 4.6% and 4.1% of the national vote). In short, MORENA captured an amorphous mass of disenchanted voters who abandoned their old party loyalties to bet on a new political acronym, multiplying its electoral return fivefold in just three years.

From this perspective, the electoral tsunami is the product of a profound transformation of the former partisan options. The wave resulted from a tremor that occurred before it formed and expanded, made landfall, and flooded the polls in July 2018. The earthquake that caused the collapse of the PRD, the PRI, and the PAN was preceded by a slow process of decomposition that dates back to the midterm legislative elections of 2003 (Sonnleitner 2017). Beyond the conjunctural success of AMLO we witnessed a structural reconfiguration of the partisan forces, whose leaderships and bases deserve to be studied in greater depth.

8.3   Tracing the Origins of the Tsunami: The Rise and Fall of Tripartisanship (1991–2018)

On the surface, as observed through the votes that AMLO was able to add up, the magnitude of the alternation is staggering: having obtained 7.8% under the acronym of MORENA in the legislative elections of 2015, his coalition amassed 54.8% in the presidential elections of 2018, increasing its volume by 700%. However, this result cannot be explained by the charisma of the candidate, especially if one considers that Lopez Obrador was defeated in two previous contests, obtaining 35.3% in 2006 and 32.4% in 2012. The electoral tsunami is the product of deeper changes.

Figure 8.1 situates the scale of the earthquake from a historical perspective and captures the essence of the three-party system that had stabilized since the 1990s. It revolved around the PRI, which experienced a gradual
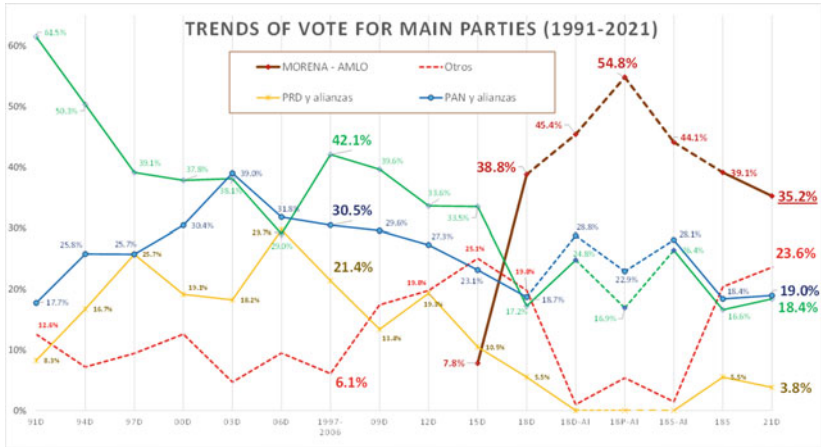
Fig. 8.1 Historical trends and vote transfers (Mexico, 1991–2021)

decline as a result of growing competition with the PAN and/or the PRD, leading to an increasing number of alternations at all levels of government. At the height of this period, the PRI captured four out of 10 votes, while three benefited the PAN and two the PRD. Between 1997 and 2006, only one in 16 votes was cast for any other political party (Fig. 8.1).[4]

These historical trends allow us to visualize the dimension of the tsunami: the rise of MORENA is exponential in 2018, when it sweeps away the traditional parties in the manner of a wave of public repudiation. It is important to distinguish the results of the parties and alliances in the different types of elections: in contrast to AMLO, *Juntos Haremos Historia* only obtained 45.4% of the vote for federal deputies (which

[4] We add the averages of the PRI, the PAN and the PRD in the four federal legislative elections held between 1997 and 2006, during the peak of the transitional tri-partisan system. As very few Mexicans know the candidates competing for deputies, the results of these elections provide a good approximation of the structural strength of the parties. Since 2009 we consider the results both of parties and coalitions, in the elections for senators ("S"), federal deputies ("D") and the presidency ("P"). This allows us to visualize the magnitude of split-ticket voting between these different types of elections. We report the results recorded by each party separately (awarding them their share of votes for coalitions), as well as the sums obtained by the alliances ("-Al"), to observe the effects of coalition strategies.

reveals the weight of the split-ticket) and MORENA barely captured 38.8% (reflecting the weight of the PT and the PES).

Despite the concentration of the presidential vote, a strong fragmentation persisted in a context of impressive volatility. It was within this unique moment of widespread dissatisfaction with the ruling political class that AMLO triumphed. And it is at this critical juncture of the collapse of the traditional party system that MORENA increased its vote by 500%. This meteoric growth is directly related to the decline of the PRD, the PRI, and even the PAN. To understand the origins and composition of this new electorate, the transfers of votes between 2015 and 2018 must be analysed by party.

The most intuitive case is that of the PRD, which López Obrador helped found in 1990, over which he presided over in the late 1990s and which nominated him successfully for Mayor of Mexico City in 2000, and for president in 2006 and 2012. A significant part of MORENA's leadership and base come from the ranks of the PRD, who left it along with AMLO to create their own political organization. This rupture can be observed in Fig. 8.1: thanks to the effect of López Obrador's presidential candidacy, the PRD still obtained 19.3% in the 2012 congressional elections. His break with the PRD leadership, after the latter joined Peña Nieto's *Pact for Mexico*, catalyzed the transformation of his faction into a new party in 2014 and resulted in a massive depletion of voters in 2015, when the PRD only retained 10.5% of the vote. The party was further reduced in 2018, obtaining only 5.5% of the legislative vote, after having joined the candidacy of Anaya of the PAN. The most notable decline occurred in 2015 (when it lost 8.8 points) but was accentuated in 2018 (with an additional 5 point drop). It is no mystery that many of those who vote for MORENA now come from these sectors.

But the composition of this new electorate is much more heterogeneous.[5] The decline of the PRI is less dramatic in relative terms, but it is crucial in substantive terms. Despite the corruption scandals, the flight of several PRI governors from the country, the "white house" scandal, and the mass protests over the disappearance of the students of Ayotzinapa, the strength of the PRI seemed to remain intact until 2015. Perceptions

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[5] The shifting sociological composition of MORENA has been mainly studied through public opinion polls (Aguilar 2019; Moreno 2019; Buendía & Márquez 2019). In this chapter, we focus on its socio-territorial transformations, through election results aggregated at the level of the 32 States and the 300 federal districts.

changed drastically in the second half of Peña Nieto's term and the PRI went from 33.5% to 17.2% of the vote in 2018, registering a loss of −16.3 percentage points, much greater than that of the PRD during the entire administration. Its results were even worse in the presidential elections, in which Meade drew 16.9% but the PRI barely obtained 14%. The alliances with the PVEM and the PANAL mitigated the defeat in the legislative elections but did not stem the debacle of their presidential candidate, who obtained eight points less than the legislative candidates.

The National Action Party withstood this transition a little better. After having obtained 27.3% in the legislative elections of 2012, it sustained two consecutive losses of four and a total decrease of 8.6 points over the presidential term of office. Its alliances with the PRD and the MC also cushioned its fall in the legislative elections of 2018, although Anaya turned out not to be an attractive option and registered 5.8 points less than the candidates for deputies in his coalition. As we will see, the PAN's split-ticket benefited Meade, "El Bronco" but especially AMLO, despite the discursive divergences of the campaigns and the presidential debates.

The transfers of votes between the rest of the parties were not disruptive. There were substantive changes in the regional composition of some of these forces, particularly in Chiapas (where the PVEM won the governorship with Manuel Velasco in 2012), in Nuevo León (governed since 2015 by Jaime Rodríguez who, after having broken with the PRI, ran as an independent candidate) and in Jalisco (where Enrique Alfaro won the governorship in 2018 under the acronym of the MC). We will revisit the growing importance of these parties for the formation of competitive subnational coalitions since their weight varies considerably throughout the country. For now, we emphasize that these parties obtained a combined total of 19.8% in the legislative elections of both 2012 and 2018 (Fig. 8.1).

In short, the exponential increase of MORENA is explained by the decline, fragmentation, and collapse of the three parties that had been structuring Mexican politics since 1991. Between 2012 and 2018, seven out of 10 PRD voters, five out of 10 PRI voters, and three out of 10 PAN voters broke with these parties to bet for alternative options. As the proportion of the other parties did not change, these votes went essentially to MORENA. In four years, AMLO's movement became the main national ruling party, with a force inferior to that of the party it displaced

but far superior to that of the party that gave rise to it. This structural reconfiguration arose from several subnational logics.[6]

8.4 The Reconfiguration of Partisan Forces: Coalitions and Presidential (Dis)Agreements

It is worth exploring the characteristics and effects of the main electoral alliances, starting from the strategies of the national leadership in the negotiation of the presidential coalitions but also considering the territorial weight of the different forces in a context of strong party fragmentation.

The most intuitive coalition emerged between the PRI, the PVEM and the PANAL, parties with well-known affinities in past elections. On this occasion, however, the successes of the *Verde* and *Nueva Alianza* in some entities led them to diversify their alliances. Initially, both even tried to negotiate their participation in a "Broad Opposition Front" promoted by the PAN, which failed to succeed. For its part, the PRI managed to avoid public ruptures in the selection of its presidential candidate. After modifying its statutes to allow the nomination of a citizen without formal party affiliation, Secretary of Finance José Antonio Meade was designated by a national convention of delegates and formally obtained the support of his most visible competitors. Finally, the PVEM and PANAL ended up joining his campaign and became part of the Todos por México coalition.

However, tensions persisted in the selection of the rest of the candidates and the coalition was fractured at the subnational level. In legislative elections, agreements were only reached in half of the states. In addition to fragmenting the vote and generating confusion among the electorate, this broke the unity of the official presidential campaign and would be reflected in distancing, dissent, readjustments, and ruptures, with critical consequences.

The ruptures were even more noticeable in the ranks of the coalition Por México al Frente. This was conceived, at first, as a broad citizen front to promote common candidacies among the PAN, the PRD and MC. Likewise, negotiations were opened with the PVEM and the
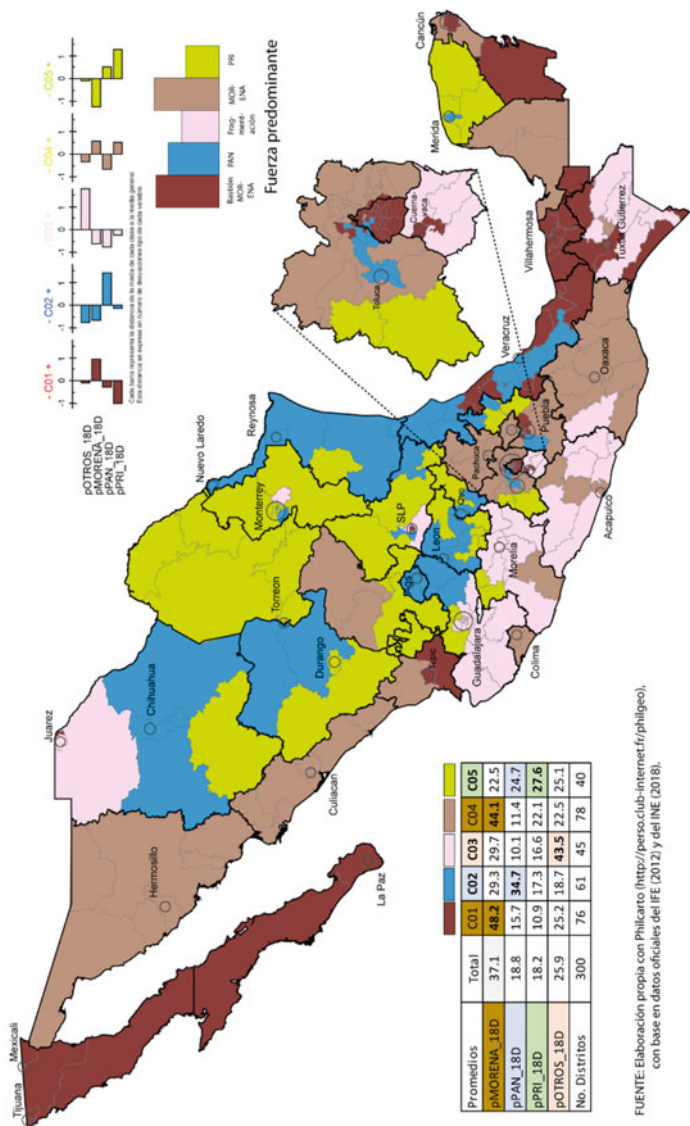
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[6] Electoral volatility and vote transfers are analyzed in further details in this chapter's online enhancements.

PANAL, which solely came to bear for some local races. The presidential candidacy became the bone of contention. In the absence of an agreement on a selection method, it was rejected by several contenders, among them the powerful PRD Mayor of Mexico City, Miguel Ángel Mancera. The tensions even split the PAN, whose party chair Ricardo Anaya managed to replace the primaries with a controversial collection of supports, dismissed as a *dedazo* [hand-picked nomination] in disguise by his opponents. The most glaring rupture translated into the resignation from the PAN by Margarita Zavala, who, after a long party affiliation and having been the first lady of Mexico during the mandate of Felipe Calderón (2006–2012), chose to compete as an independent candidate (Prud'homme 2020).

In contrast to these two residual, unstable and improvised coalitions, which lacked programmatic and ideological foundations, AMLO's unquestioned leadership galvanized a solid singular candidacy around MORENA. Since 2016, López Obrador had declared that his party would not seek alliances for the presidential elections. Without candidates of its own, the PT registered him for the third time as its external candidate in 2017, as it had done in 2006 and in 2012. The PES, on the other hand, was weighing different options, including its own national party chair, Hugo Eric Flores Cervantes, the former PAN member Margarita Zavala and the soccer player star-mayor of Cuernavaca, Cuauhtémoc Blanco. Only in December would this new evangelical party end up selecting AMLO as its candidate and joining the Juntos Haremos Historia coalition.

The importance of these coalitions may be observed in the federal legislative elections at the level of districts. Map 8.1 synthesizes the territorial correlation of forces in 2018. It displays confirms MORENA's advantageous position in 154 districts of the Northern Pacific Coast, Central Mexico, the Southeast, and the Yucatán Peninsula (in light and dark brown colors), with a majority presence in 76 of them (located in Baja California, Baja California Sur, Nayarit, Mexico City, Cuernavaca, and Puebla, as well as in Veracruz, Tabasco, Quintana Roo, and Chiapas).

The PAN, in contrast, still keeps an advantage in 61 districts of the Bajío (particularly in the industrial corridor that crosses Aguascalientes, Jalisco, Guanajuato, and Querétaro), in some regions of Chihuahua, Durango, Tamaulipas, Puebla, and Veracruz, as well as in the cities of Monterrey, San Luis Potosí, Toluca, and Mérida (in light blue). The PRI only maintains a competitive position in 40 districts of the North, the Bajío, Central Mexico, and Yucatán (in green), where the vote is disputed

Promedios	Total	C01	C02	C03	C04	C05
pMORENA_18D	37.1	48.2	29.3	29.7	44.1	22.5
pPAN_18D	18.8	15.7	34.7	10.1	11.4	24.7
pPRI_18D	18.2	10.9	17.3	16.6	22.1	27.6
pOTROS_18D	25.9	25.2	18.7	43.5	22.5	25.1
No. Distritos	300	76	61	45	78	40

FUENTE: Elaboración propia con Philcarto (http://persoclub-internet.fr/philgeo), con base en datos oficiales del IFE (2012) y del INE (2018).

Map 8.1   The new geography of Mexican parties (Federal Deputies 2018)

with MORENA and the PAN. The other parties also do play an important role, especially in the remaining 45 districts located in Chiapas, Morelos, Guerrero, Michoacán, and Jalisco (in pink) where, under different leaders and brands, they get 43.5% of valid ballots. The legislative vote of Mexicans disperses across more than five relevant forces, whose configuration varies throughout the national territory (Map 8.1).[7]

The primary beneficiary of this profound reconfiguration of political parties was AMLO, whose third presidential campaign was favoured by four decades of combat and experience, in government and from the opposition.

8.5   AMLO's Moment: Split Ticket and Strategic, "Useful" or "Negative" Voting

Although his adversaries stigmatize him as an *outsider*, Andrés Manuel López Obrador is one of the most genuine *insiders*, with the longest trajectory and expertise in traditional Mexican politics. Brought up from his youth in the ranks of the PRI, the Tabasco native made an extensive career in this party before resigning to compete as a candidate for governor of his home state in 1988, championed by the *Frente Democrático Nacional* (National Democratic Front) that nominated Cuauhtémoc Cárdenas for the presidency that year. After the local elections of 1991, he organized a protest march called *Exodus for Democracy*, competed again for the governorship of Tabasco in 1994, and led another *Caravan for Democracy*, making him one of the most popular politicians of the PRD and leading him to preside over the party between 1996 and 1999 (Proceso 2018).

In 2000, AMLO was elected Head of Government of the Federal District, a position that situated him as the central figure of the left and as a presidential candidate in 2006. After he lost by 243 934 votes (0.58%), he alleged fraud, refused to acknowledge Calderón, proclaimed himself

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[7] Map 8.1 was constructed using an Ascending Hierarchical Classification (AHC). This method groups the territorial units minimizing the internal variance of the averages of each category, while maximizing their differentiation with respect to the rest of the categories. This makes it possible to cluster the most similar and the most different cases, situating the primary logics of their territorial distribution and borders (Minvielle & Souiah 2003: 61–82). For further analysis of Mexico's new electoral geography, see the chapter's enhancement online.

"Legitimate President", and formed his own "Legitimate Government". In 2012, his second defeat in the presidential race led him to again disregard the results, to break with the PRD and to form his own party, taking the cadres and rank and file of his *Movimiento de Regeneración Nacional* with him. Despite all these defeats, López Obrador exerted important coattails effects and brought together a significantly higher proportion of votes than his supporters in the legislative elections.

But it was not until 2018 that his third presidential campaign catalyzed a true tsunami, a product of the massive rejection of the ruling elite that was reflected in a conclusive split-ticket vote.[8] While the candidates of Juntos Haremos Historia registered 45.4% of the vote for federal deputies, AMLO amassed 10 additional points in the presidential elections. Table 8.1 summarizes this "useful vote" [*voto útil*] at the national level. The split tickets come from voters who chose one of the parties of Todos por México or Por México al Frente in the legislative elections but did not vote for Meade (−7.9 points) or Anaya (−5.3 points) in the presidential race, as well as from citizens who abstained or annulled their ballots in the first but voted validly in the second. The most significant transfers occurred among the voters of the PRI and the PVEM (among whom Meade lost 3.2 million votes), while PAN sympathizers voted in a more disciplined manner (Anaya lost 1.4 million PRD voters and 1.5 million voters from the MC). Logically, "El Bronco" captured part of this split-ticket vote, since he did not even have allied candidates in the legislative elections.

There are different ways to interpret this type of electoral behaviour. From an optimistic perspective, these voters preferred López Obrador's candidacy because it was simply more attractive to them. On the other hand, in the light of rational choice theory, it is often argued that in a majoritarian electoral system with a single round, the best-informed voters anticipate the chances of victory of the main contenders and vote for the candidacy with the greatest chance of defeating that which they consider least desirable, thus exercising a strategic vote for their second choice

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[8] According to the series of pre-election polls conducted by Alejandro Moreno (2019) for the "Universal" newspaper and by Jorge Buendía's polling firm, AMLO's advantage was less than ten points until February 2018, and only grew when Ricardo Anaya was publicly accused of money laundering by the Federal Attorney General's Office on Februrary 21, 2018, reaching 18 points by the end of March (Buendía & Márquez 2019).

Table 8.1 Aggregated split-ticket vote between legislative and presidential elections (Mexico, 2018)

Votación	PAN	PRD	MC	PRI	PVEM	NA	MORENA	PT	ES	Indep. 1	Indep. 2	No Reg.	Nulos	TOTAL
PRESIDENTE	9,996,514	1,602,715	1,010,891	7,677,180	1,051,480	561,193	25,186,577	3,396,805	1,530,101	2,961,732		31,982	1,603,857	56,611,027
%Voto Total	17.7%	2.8%	1.8%	13.6%	1.9%	1.0%	44.5%	6.0%	2.7%	5.2%		0.1%	2.8%	
%Voto Válido	18.2%	2.9%	1.8%	14.0%	1.9%	1.0%	45.8%	6.2%	2.8%	5.4%		0.1%	2.9%	
Candidatos	Anaya	Anaya	Anaya	Meade	Meade	Meade	AMLO	AMLO	AMLO	Bronco				
(sumas y %Tot.yVál.)	12,610,120	22.3%	22.9%	9,289,853	16.4%	16.9%	30,113,483	53.2%	54.8%	5.4%				
DIPUTADOS	10,093,012	2,367,452	2,484,185	9,307,233	2,694,654	1,390,882	20,968,859	2,210,988	1,353,499	534,975	3,989	32,938	2,241,811	56,284,477
%Voto Total	17.9%	5.3%	4.4%	16.5%	4.8%	2.5%	37.3%	3.9%	2.4%	1.0%	0.0%	0.1%	4.0%	
%Voto Válido	18.7%	5.5%	4.6%	17.2%	5.0%	2.6%	38.8%	4.1%	2.5%	1.0%	0.0%	0.1%	4.2%	
Coaliciones	Por México al Frente (parcial)			Todos por México (parcial)			Juntos Haremos Historia							
(sumas y %Tot.yVál.)	15,544,649	27.6%	28.8%	13,392,769	23.8%	24.8%	24,533,346	43.6%	45.4%					
Voto cruzado	-96,498	-1,364,737	-1,473,294	-1,630,053	-1,643,174	-829,689	4,217,718	1,185,817	176,602	-2,426,757	-3,989	-956	-637,954	326,550
%Voto Total	-0.3%	-2.4%	-2.6%	-3.0%	-2.9%	-1.5%	7.2%	2.1%	0.3%	4.3%	0.0%	0.0%	-1.1%	0.58%
%Voto Válido	-0.5%	-2.6%	-2.8%	-3.3%	-3.1%	-1.6%	7.0%	2.1%	0.3%	4.4%	0.0%	0.0%	-1.2%	0.59%
Candidatos	Anaya	Anaya	Anaya	Meade	Meade	Meade	AMLO	AMLO	AMLO	Bronco			Nulos	Total
(sumas y %Tot.yVál.)	-2,934,529	-5.3%	-5.8%	-4,102,916	-7.4%	-7.9%	5,580,127	9.6%	9.4%	5.4%			-1.2%	0.59%

FUENTE: Elaboración propia con base en resultados electorales definitivos (INE 2018)

(Burden and Kimball 2002; Campbell and Miller 1957). Another "Madisonian" argument, recurrent in the literature on US elections, claims that these voters intentionally split their tickets to limit the power of the Executive by balancing the composition of the Legislature (Lewis-Beck and Nadau 2004; Fiorina 1996). It may also be argued that this reflects a "negative" vote, rejecting the candidacy of the party of choice, which is transferred to another option perceived as "less bad".

Citizen perceptions support this last interpretation: 42% of those surveyed by BERUMEN-IPSOS in June 2018 stated that they would "*never vote for the PRI*", while only 14% planned to vote for its candidates for Congress and 13% for the presidential contender. This survey also makes it possible to investigate the individual logic of split-ticket voting, which cannot be inferred from aggregate results. As illustrated in Table 8.2, Anaya retained 83% of those voting for the PAN in the legislative elections but only captured 48% and 34% of those voting for the PRD or the MC; Meade retained 82% of the PRI voters but only captured 42% and 32% of the PVEM and the PANAL. In contrast, AMLO not only retained 96% of MORENA, 87% of the PES and 84% of the PT voters; he was able to attract 55% of the voters of the MC, 40% of the PRD, 42% of the PANAL, 35% of the PVEM, and even 12% of the PAN and 10% of the PRI (see Table 8.2).

Despite the coalitions negotiated by the PAN and PRI leaderships, López Obrador's candidacy was more attractive than that of Meade for those of the PANAL and that of Anaya for voters from the MC, achieving to divide the electorates of the PRD and the PVEM. The composition of split ticket votes also varied according to territorial contexts. The same survey captures its sources in the nine entities that elected governors. With the sole exception of Guanajuato, AMLO always retained more than 94% of those who stated they wanted to vote for MORENA in the legislative elections; he captured more than half of the PRD voters in Mexico City and attracted at least two out of every three MC voters in Chiapas, Puebla, and Yucatán, as well as those of PANAL in Puebla, Chiapas, and Jalisco. He attracted four out of 10 PVEM voters in Jalisco and Puebla, as well as 23% of the PAN and 21% of the PRI in Chiapas (see Table 8.3).

Table 8.2 Individual split-ticket vote between legislative and presidential elections of 2018

P1_14 El primero de julio ¿por cuál partido va a votar usted para Diputado Federal	P1_5 Por quién va a votar el primero de julio para Presidente de la República									
	1 Ricardo Anaya Cortés		2 José Antonio Meade Kuribreña		3 Andrés Manuel López Obrador		5 Jaime Rodríguez Calderón -El Bronco-		Total	
	Recuento	% fila	Recuento	% fila	Recuento	% fila	Recuento	% fila	Recuento	% fila
1 PAN	1855	83%	78	3%	273	12%	27	1%	2233	100%
3 PRD	180	48%	34	9%	149	40%	10	3%	373	100%
6 Movimiento Ciudadano (MC)	88	34%	15	6%	143	55%	15	6%	261	100%
2 PRI	110	7%	1353	82%	166	10%	14	1%	1643	100%
4 Partido Verde (PVEM)	33	19%	72	42%	59	35%	6	4%	170	100%
7 Partido Nueva Alianza (PANAL)	16	23%	23	32%	30	42%	2	3%	71	100%
9 Partido Encuentro Social (PES)	6	7%	4	4%	79	87%	2	2%	91	100%
5 Partido del Trabajo (PT)	21	6%	27	7%	305	84%	8	2%	361	100%
8 Movimiento Regeneración Nacional (MORENA)	68	2%	38	1%	3604	96%	34	1%	3744	100%
Otros (otros partidos, no sabe, no responde, etc.)	245	20%	113	9%	742	60%	138	11%	1238	100%
Total de preferencias válidas para presidenciales	2622	26%	1757	17%	5550	54%	256	3%	10185	100%

FUENTE: Elaboración propia con base en los micro-datos de la Encuesta Berumen-Ipsos (2018)

Table 8.3 Percent of split-ticket vote cast for AMLO, nationally and in nine states (Mexico 2018)

Voto cruzado por partidos (en las legislativas) / por candidatos (en las presidenciales), por entidades con elecciones para gobernador										
P1_14 El primero de julio ¿por cuál partido va a votar usted para Diputado Federal?	%AMLO (NACIONAL)	%AMLO Chiapas	%AMLO Jalisco	%AMLO Morelos	%AMLO Puebla	%AMLO Tabasco	%AMLO Veracruz	%AMLO Yucatán	%AMLO CDMX	%AMLO Guanajuato
1 PAN	12	23	7	8	14	6	14	11	6	9
2 PRI	9	21	6	12	13	4	5	5	7	2
3 PRD	39	44	40	21	45	35	20	25	54	33
4 Partido Verde (PVEM)	33	24	43	39	40	25	37		33	6
5 Partido del Trabajo (PT)	81	93	91	30	54	100	83	82	77	82
6 Movimiento Ciudadano (MC)	52	68	37	16	81	44	56	100	40	42
7 Partido Nueva Alianza (PANAL)	42	67	100	17	60	31	38		43	
8 Movimiento Regeneración Nacional (MORENA)	96	94	98	95	96	96	95	96	97	89
9 Partido Encuentro Social (PES)	79	94		56	60	100	50	100	86	100
Total	**53**	**74**	**44**	**46**	**60**	**70**	**51**	**36**	**61**	**27**

FUENTE: Elaboración propia con base en los micro-datos de la Encuesta Berumen-Ipsos (2018)

8.6   AFTER THE TSUNAMI: RUPTURES
AND CONTINUITIES OF THE *Regeneración Nacional*

The energy of a tsunami—and its consequences—depends on the magnitude of the tectonic movement that determines its height, the number of peaks, its wavelength, and the size of its front. In Mexico, everybody knows the dimension of the wave that devastated the traditional parties in 2018. Now, the relevant question involves establishing the number of peaks and the length of the wave: When and where did it originate? What lasting effects will it have once its energy has been released and the tides have receded?

The tectonic movement that led AMLO to the Presidency was the product of a widespread rejection of the ruling parties, which resulted in a massive negative vote and alternation. Three processes with distinct temporalities converged and profoundly re-shaped the electoral map in 2018: the reconfiguration of political forces, produced by the erosion, fragmentation and collapse of the transitional party system; the renegotiation of presidential alliances and the redistribution of leaderships following the ruptures that led to the nomination of their candidates, both national and local; and the conclusive rejection of the outgoing governments, reflected in a decisive split-ticket vote to the detriment of Meade and Anaya, in benefit of López Obrador.

It is still early to assess whether MORENA will be able to consolidate itself as a new majority, dominant or hegemonic party, since this depends on how the internal struggles for AMLO's succession in 2024 are processed. What is clear is that the earthquake has transformed the foundations of the transitional party system which shows no signs of recovery. The crises opened by the defeats of Anaya in the PAN and Meade in the PRI have not been resolved and the internal ruptures continue to emerge, along with new dispersals of cadres, party members, and voters. As subsequent elections have demonstrated, *Regeneración Nacional* has taken hold as fragmentation and partisan disaffection have continued to prevail.

After having won the governorships of Chiapas, Morelos, Tabasco, Veracruz, and Mexico City in 2018, diverse coalitions led by MORENA won Puebla and Baja California in 2019, less by their own strength than thanks to high levels of abstention and the disintegration of traditional parties. Despite the crisis opened by the tragic death of the newly elected governor, turnout in Puebla plummeted from 65.8% to 33.4% and

the MORENA-PT-PVEM coalition won the governorship with 44.8% of the valid vote against a dispersed opposition. Luis Miguel Barbosa Huerta took the governorship with 687,000 suffrages (15% of registered voters), after having lost with 1,031,043 votes in 2018 (22.5%). MORENA barely captured 393,000 votes (8.6%), less than the PAN and the PRI could have obtained if they had competed together.[9] In Baja California, the MORENA-PT-PVEM-*Transformemos* coalition won the governorship with 50.6%. Its candidate Jaime Bonilla Valdez swept his rivals from the PAN (22.9%), the PRD (8.7%), the MC (6.6%), the PRI (4.7%) and the local PBC party (3.6%), which all competed separately. However, participation only reached 29.9%: MORENA obtained 43.3% of the valid vote but barely mobilized 12.6% of those registered.[10]

In 2020, the elections in Coahuila resulted in a comeback by the PRI, which obtained 49.3% of the vote and won 16 of the 25 seats of the local Congress, compared to 19.3% and five seats for MORENA.[11] Similarly, the elections for municipal governments in Hidalgo resulted in 32 victories for the PRI, 18 for the PAN-PRD and only 10 for MORENA (four of them in coalition with three other parties).[12] A year later, however, the midterm legislative elections coincided with 30 local elections and the renewal of 20,446 positions redistributed power. MORENA won 11 of the 15 governorships and obtained a majority in 19 of the 30 state legislatures at stake.

In 2022, this party won four of the six governorships and 37% of the contested legislative seats, allowing it to now control 20 governorships and 21 state legislatures. Nonetheless, when abstention rates are considered, the proportion of registered voters that MORENA mobilized was between 13.3% and 15.4% in Quintana Roo, Durango and Aguascalientes, and between 23.6% and 26.5% in Oaxaca, Hidalgo, and Tamaulipas. Far from corroborating the strength of *Regeneración Nacional*, these alternations are the result of the bankruptcy of the transitional party system, which revolves around a new pivotal coalition with a majority vocation facing a highly dispersed opposition.

[9] https://www.ieepuebla.org.mx/ (last consulted June 14, 2022).

[10] https://www.ieebcs.org.mx/ (last consulted June 14, 2022).

[11] http://www.iec.org.mx/ (last consulted June 14, 2022).

[12] http://www.ieehidalgo.org.mx/ (last consulted June 14, 2022).

MORENA's capacity for mobilization also reflects in two referendums promoted by AMLO. In August 2021, 6.6 million citizens (7.1% of those registered) went to the polls to answer a controversial question and 97.7% of them did in the way suggested by Lopez Obrador.[13] In April 2022 a second "recall" exercise, no less controversial, was promoted by his own partisans and 16.5 million citizens participated (17.7% of the nominal list), of whom 91.9% voted in favour of him "*continuing as President*".[14] Both *consultas* involved logic very different from competitive elections (with alternative options and uncertain results), since both were promoted by the ruling party to boost AMLO's legitimacy and boycotted by the opposition. In 2021, 6.9% of registered voters answered affirmatively to the presidential call, in contrast to the 17.8% who voted for MORENA two months earlier. In 2022, 16.3% of those registered mobilized to confirm AMLO, in contrast to the 33.7% who voted for him in the presidential elections and to the 24.5% who voted for MORENA in the legislative elections of 2018. The correlations in the territorial distribution of these five results vary between +0.621 and +0.871 (at the level of the 300 districts) and reveal an impressive geographical continuity.

On the other hand, the countless coalitions, conjunctural and partial, that the PAN, the PRI and the PRD have formed in recent years have not only gained votes. They have also contributed to the blurring of the programmatic proposals and partisan identities that have differentiated them in the past. What effects can an alliance with the PRI–whose rejection rates now exceed 70% of the electorate—have for the PANin conservative states such as Aguascalientes, San Luis Potosí, Jalisco, and Guanajuato, where Catholic voters already felt abandoned or orphaned? Without an opposition with differentiated programs and coherent proposals, there can be no consistent alternations, nor effective checks and balances, nor any efficient mechanisms of accountability.

In some respects, Mexico is currently undergoing a situation comparable to that experienced by Bolivia, Ecuador, and Venezuela during

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[13] Phrased as follows: *"Do you or do you not agree that the pertinent actions be carried out in accordance with the constitutional and legal framework to undertake a process of clarification of the political decisions made in recent years by political actors, aimed at guaranteeing justice and the rights of potential victims?"*.

[14] Phrased as follows: "*Do you agree that the mandate of Andrés Manuel López Obrador, President of the United Mexican States, should be revoked due to a loss of confidence or that he remains in the Presidency of the Republic until the end of his term?"*.

the first elections of Evo Morales, Rafael Correa, and Hugo Chávez in the late 1990s, when their party systems collapsed. However, there are fundamental differences. Like his Andean counterparts, López Obrador galvanized a massive coalition of discontents but, in contrast to them, he is not an *outsider*. With a long-standing affiliation that began in the PRI and matured in the PRD before creating his own party movement, AMLO acts as the last sincere *insider* of post-revolutionary politics. His government is pragmatic and heterogeneous, embodying and incorporating the ideals of the golden age of the PRI, when it promoted a national-popular State-centered development project. Neither his policies nor his projects are comparable to those of Morales, Correa, or Chávez in the Andean region.

What is similar, however, is the level of polarization and violence of the internal ruptures produced by this electoral tsunami-alternation among the elites, old and new, impassioned or terrified by the rhetoric of AMLO's *Fourth Transformation*. Without the traditional parties realizing it, Mexico endured a political earthquake of unprecedented force and weathered a perfect storm democratically. The time has come to call up the crews and repair the vessels, to weigh the magnitude of the change in its proper proportions and to rebuild a plural party system, to include the growing political diversity, and to represent the new correlation of forces.

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