# Vote Share in Mexican Presidential Elections, 2 June 2024, by State



BAJA CALIFORNIA NORTE

BAJA CALIFORNIA SUR

SONORA

CHIHUAHUA

Ciudad Juárez

COAHUILA

NUEVO LEÓN

SINALOA

DURANGO

ZACATECAS

TAMAULIPAS

SAN LUIS POTOSÍ

NAYARIT

JALISCO

COLIMA

MICHOACÁN

GUERRERO

VERACRUZ

OAXACA

Mexico City

PUEBLA

TABASCO

CHIAPAS

CAMPECHE

YUCATÁN

QUINTANA ROO

1
2
3
4
5
6
7
8

Sheinbaum win by more than 40%

Sheinbaum win by 20–40%

Sheinbaum win

Opposition win

Key to states in central Mexico:

1  AGUASCALIENTES
2  GUANAJUATO
3  QUERÉTARO
4  HIDALGO
5  MÉXICO
6  CIUDAD DE MÉXICO
7  MORELOS
8  TLAXCALA

0                    300 miles

TONY WOOD

# MEXICO IN FLUX

## *Birth of a New Party System*

WHILE THE OUTCOME of Mexico's presidential election on 2 June came as little surprise, the scale of it was startling.[1] Claudia Sheinbaum, the former governor of Mexico City, had been the frontrunner even before she was formally named the candidate of a coalition between the ruling National Regeneration Movement (Movimiento de Regeneración Nacional, Morena), the Green Party (Partido Verde Ecologista de México, PVEM) and the Worker's Party (Partido del Trabajo, PT). But while most polls in the lead-up to the vote projected her winning by a solid margin, there was little hint of the landslide to come. Sheinbaum scored 60 per cent, garnering just under 36 million votes, while her nearest rival, Xóchitl Gálvez, candidate of a three-party coalition between the National Action Party (Partido Acción Nacional, PAN), the Institutional Revolutionary Party (Partido Revolucionario Institucional, PRI), and the Party of the Democratic Revolution (Partido de la Revolución Democrática, PRD), scored 27 per cent; Jorge Álvarez Máynez of the Citizens' Movement (Movimiento Ciudadano, MC) came a distant third with 10 per cent.

Sheinbaum's victory is even more impressive when broken down geographically and sociologically. Mexico is a tremendously diverse country, with marked demographic, socio-economic and cultural differences between regions. Since the advent of competitive elections in the 1990s, these have tended to produce a variegated political map. But Sheinbaum not only won all of Mexico's 32 states except one (tiny Aguascalientes); she did so by more than 20 per cent in 25 cases, and by more than 40 per cent in 14.[2] She performed especially well in the country's poorer south, pulling in more than 70 per cent of the vote in Chiapas, Guerrero,

Oaxaca, Tabasco and Quintana Roo. But she also won Guanajuato and Jalisco, the heartland of Mexican conservatism, as well as Mexico State, long a crucial base for the PRI, and Nuevo León, bastion of the country's northern business elites. Exit polls suggest Sheinbaum's support also had a striking sociological breadth: she seems to have won a clear majority in every age cohort and of almost every level of education, and had a crushing 50-point lead among those who identified as 'lower class'. Even among the 'middle class', whom the opposition had clearly expected to rally to its side, Sheinbaum was ahead by 30 points.[3]

More than a victory, this was a political show of force. Yet it was not entirely unprecedented: in 2018, Sheinbaum's predecessor, Andrés Manuel López Obrador—universally known by the initials AMLO—won in similarly crushing fashion, by 53 per cent to his nearest rival's 22, and he likewise swept the map (the only state he didn't win was Guanajuato). At the time, the 2018 result was seen as a political earthquake, and it sent establishment pundits into a tailspin. Sheinbaum's victory confirms that the systemic shock López Obrador delivered six years ago was no fluke, but rather marked the start of a new period in Mexico's political history. It also poses once more an analytical challenge most commentary in the Anglosphere has been ill equipped to meet: how to explain the enduring popularity of AMLO himself and the sustained success of Morena as a national project for power?

The interpretative task is scarcely made easier by the polarization of views on López Obrador and the pervasive tendency for discussions to focus on his persona. According to his critics—massively over-represented both in the Mexican media and Anglo outlets—AMLO has taken the country to the brink of disaster, undermining its institutions, coarsening political discourse and spreading misinformation. For his supporters—far less visible in the Mexican media, and almost totally ignored outside it—he has mounted a long-overdue challenge to the privileges of a small elite, and has improved living standards for the majority of the population while beginning to tackle the scourge of corruption. To judge by most

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[2] Calculations based on the Instituto Nacional Electoral's Cómputos Distritales, computos2024.ine.mx.
[3] Data from Alejandro Moreno, 'Respaldo a "4T" y a AMLO apuntala triunfo de Sheinbaum: Encuesta EF', *El Financiero*, 4 June 2024.

coverage in Mexico and outside it, López Obrador leaves office under a cloud of unprecedented discontent. Yet he has consistently had the highest approval rating of any Mexican president since the return of competitive elections, and when those who voted for his successor were asked their reasons for doing so, huge majorities cited a desire to maintain his policies.[4]

If Sheinbaum's election represents a validation of AMLO's legacy, understanding what comes next for Mexico partly depends on what we take that legacy to be. López Obrador came to power in 2018 promising a 'Fourth Transformation', a period of national renewal comparable to three historic upheavals that remade the country: the struggle for independence from Spain in 1810–21; the mid-nineteenth-century liberal reforms under Benito Juárez; and the Mexican Revolution of 1910–20. Both López Obrador's supporters and his critics refer to this ambitious project as 'the 4T'—the difference lying in the tone with which they do so. Nothing quite so grandiose has taken place during his *sexenio*, but there can be little doubt that Mexico's political topography has shifted dramatically, nor that he and Morena have played an active role in that process. This makes it especially important to get a clearer picture of the nature of AMLO's and Morena's project, as well as of his administration's actual record, in order to then assess the likely trajectories open to his successor.

## Origins of the 4T

AMLO's path to power was long and contentious, but the ideas and commitments that came to underpin his '4T' have been remarkably consistent. He was born in the coastal state of Tabasco in 1953, to parents who had come from humble backgrounds to become petty traders. He studied political science at the Universidad Nacional Autónoma de México in the capital, strongly influenced by the radical ferment of the early 1970s, and like many of his peers stunned by the downfall of Allende in 1973.[5] He returned to Tabasco in 1976, entering politics through the national senate campaign of the poet Carlos Pellicer, who

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[4] Moreno, 'Respaldo a "4T"'.
[5] Héctor Quintanar Pérez, *Las raíces del Movimiento Regeneración Nacional: antecedentes, consolidación partidaria y definición ideológica de Morena*, Mexico City 2017, pp. 45–6.

ran as an external candidate under the PRI's flag. Rather than cruise to a rigged victory in the customary PRI manner, Pellicer mounted a serious populist campaign to try to actually win the vote—an on-the-ground experience from which AMLO clearly absorbed much.[6] A year later López Obrador was appointed to run Tabasco's branch of the Instituto Nacional Indigenista,  the Mexican government body tasked with 'incorporating' indigenous people into the national economy and the mestizo mainstream. Over the next few years he oversaw various INI programs designed to address the poverty and marginalization of Tabasco's Chontal Maya peoples—improvements to agricultural productivity, construction of housing and schools, establishment of a Chontal-language radio station. The success of these ventures drew the attention of the state-level PRI leadership, but in 1983 López Obrador turned down an administrative role in the party, already pessimistic about the possibilities for its democratization from within.[7] In the late 1970s and early 1980s, he also taught sociology at Tabasco's state university, and in 1987 he completed his degree at UNAM with a thesis on 'The Process of Formation of the National State in Mexico, 1821–67'. The period in question spans two of the three precedents he would draw on for the 4T; his choice of topic also signalled a desire to seek additional roots for a national-popular politics, at a moment when the PRI's self-serving mythology of the Mexican Revolution was reaching the point of exhaustion.

In November 1988, López Obrador gave an interview to the magazine *¡Por Esto!* in which he summed up his political philosophy: 'I am a *juarista* politically and a *cardenista* economically and socially.'[8] Benito Juárez, president from 1858–72, battled against entrenched conservative interests, especially the Catholic Church, as well as leading the resistance to France's imposition of Maximilian Habsburg as Emperor of Mexico. Lázaro Cárdenas, president from 1934–40, carried out a sweeping agrarian reform, redistributing 50 million hectares of land, and revived the progressive impulses of the Mexican Revolution. López Obrador was among those who supported the presidential candidacy of Lázaro's son, Cuauhtémoc Cárdenas. In 1988, the latter was put forward by the

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[6] Pellicer (1897–1977), a modernist poet and prominent cultural figure, died only a few months into his tenure as senator for Tabasco. On AMLO's connection with Pellicer see Quintanar, *Las raíces del Movimiento Regeneración Nacional*, pp. 43–4, 47–8.

[7] Quintanar, *Las raíces del Movimiento Regeneración Nacional*, pp. 48–53.

[8] 'Quién es Andrés Manuel López Obrador', *¡Por Esto!*, 9 November 1988.

National Democratic Front (Frente Democrático Nacional, FDN), which had emerged out of a confluence of civil society groups, the organized left, and dissident PRI members opposed to the ruling party's adoption of neoliberal policies. But the PRI's nominee, Carlos Salinas, won the presidency through a particularly brazen fraud, and then proceeded to accelerate the neoliberal programme of free-market reforms and privatizations, leading the country into NAFTA at the end of his term, and bequeathing his successor the peso crisis of 1994 and a deep recession.[9] In the wake of the 1988 fraud, meanwhile, Cárdenas formed the social-democratic PRD, and in 1997 he won the governorship of Mexico City, creating a platform for challenging the PRI at the national level.

But it was the right-wing PAN, not the PRD, that ousted the PRI from power in 2000. López Obrador, having served as head of the PRD from 1996–99, succeeded Cárdenas as Mexico City governor. Over the next five years, he ruled the capital with an eye to his own presidential bid. Many of his signature themes and policies were already present then: his vocal opposition to neoliberalism and the PRI's corruption; his implementation of redistributive measures, including universal old-age pensions; and his penchant for showy infrastructure projects, such as building a second storey on concrete stilts for the Periférico, the motorway that encircles Mexico City. In 2000, while campaigning for the governorship AMLO had laid out a programme featuring two of what would become his key slogans: 'for the good of all, putting the poor first'—itself an echo of Liberation Theology's 'preferential option for the poor'—and 'republican austerity', which harked back to the moral probity and patriotism of Juárez while signalling a commitment to fiscal responsibility (a rational move after the national traumas of the 1980s debt crisis and mid-1990s recession).[10] In 2004, he carried these themes over to a blueprint for national government, adding a promise to use the country's oil revenues as a 'lever for development'.[11] Another crucial part of his repertoire was added in 2005 thanks to President Vicente Fox: seeing that López Obrador was a serious contender for the presidency the following year, Fox tried to have him barred from the election on spurious grounds. The attempt failed, but AMLO got a first taste of how far Mexico's elites— whom he termed 'the power mafia'—would go to block his path.

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[9] Carlos Medeiros, 'Asset-Stripping the State', NLR 55 January–February 2009.
[10] Quintanar, *Las raíces del Movimiento Regeneración Nacional*, p. 86.
[11] Andrés Manuel López Obrador, *Un proyecto alternativo de nación: hacia un cambio verdadero*, Mexico City 2004.

What happened in 2006 would only have confirmed his suspicions. Amid a string of irregularities and with the margin between him and the PAN candidate Felipe Calderón at less than 0.5 per cent, the National Electoral Institute shrugged off demands for a partial recount and handed the win to Calderón.[12] López Obrador refused to recognize the result, and after hundreds of thousands of his supporters organized sit-in protests on Reforma Avenue in the heart of the capital, declared himself the 'legitimate president'. The clamour around the election subsided, but for AMLO it was clear that Mexico's electoral authorities— supposedly non-partisan since the end of PRI rule—had become another instrument in the Mexican establishment's arsenal.

In the meantime, Calderón had launched a 'war on drugs', deploying the armed forces against narco gangs and ushering in a drastic escalation of violence. The appalling death toll—there were some 121,613 homicides under Calderón—and the economic slump that followed the global financial crisis of 2008–09 fuelled growing disillusionment with the PAN.[13] Yet in 2012 Mexican voters turned not to AMLO, but back to the PRI, which had put forward a young, telegenic candidate in the form of Enrique Peña Nieto, and seemed to offer a reassuring combination of familiarity and renewal. As it turned out, the record of Peña Nieto and the PRI proved even worse than that of the PAN—more corrupt, less competent, and equally unable to stem the drug war casualties. Under Peña Nieto there were some 157,158 homicides all told, and the violence spread across more of the country than ever before.

By the time of the next presidential elections in 2018, both the PAN and the PRI had been discredited in the eyes of voters, while the PRD had lost its way amid constant infighting and sordid compromises. Mexico's political establishment was ripe for a fall—and it was López Obrador who pushed it over the edge, winning the presidency at the third attempt. The coalition led by his Morena party, which had been organized as a vehicle for his 2012 presidential bid and had only won its first congressional seats in 2015, now secured healthy majorities in both houses of the Mexican Congress. Morena's sudden rise meant an equally sudden slump for Mexico's established political forces. The PAN

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[12] See Al Giordano, 'Mexico's Presidential Swindle', NLR 41 September–October 2006.

[13] Homicide figures in this paragraph from 'Defunciones por homicidios', Instituto Nacional de Estadística, Geografía e Informática (INEGI), inegi.org.mx.

lost close to 40 seats in the two chambers in 2018, while the PRD lost 45. The PRI's collapse was still more dramatic: it lost more than 260 seats in total, and went from being Mexico's dominant force to just one piece of a fragmented opposition.

Much of the vehemence of the opposition to AMLO since 2018 can be traced back to the scale of this victory, from which the other parties show little sign of recovering. Electorally, the PAN, PRI and PRD were ultimately forced into an awkward alliance to present any kind of challenge to Morena, though so far, they have fallen short. For López Obrador's supporters, these parties simply represent different faces of a single political beast they refer to as the 'PRIAND'; with the convergence between the three, the term moved from the realm of caricature to the electoral arena. To little avail: Xóchitl Gálvez's score of 27 per cent this year was 11 points worse than that of the PAN and PRI candidates combined in 2018. Smashing the old order so thoroughly was, for the 53 per cent of the electorate who voted for AMLO, a great achievement; for Mexico's political establishment and mainstream media, it was an unforgivable sin. While his crushing victory gave López Obrador an undeniable democratic mandate, divergent reactions to 2018 still colour perceptions of what he did with it.

### AMLO *in the National Palace*

On taking office in December 2018, López Obrador moved quickly to implement 'republican austerity'. Early on this involved some highly symbolic moves, such as cutting his own salary by half, turning the presidential residence of Los Pinos into a public museum and selling off the presidential plane. More than money-saving gestures, these were designed to mark a break with the tradition of using high office for personal enrichment, as well as signalling Morena's class politics more broadly. This would be a government for the public good, now defined not as an abstract principle but as material improvement in the lives of the popular classes. Mexico is one of the five most unequal countries in the world, and the average income is around one-fifth that in the US, while around a sixth of the population lives in informal settlements, often lacking the most basic services.[14]

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[14] Christine Murray and Michael Stott, 'Mexico's Elite Struggles to Comprehend Left's Landslide Election Win', *Financial Times*, 8 June 2024; income figures from OECD Data, housing figure from CEPALSTAT.

On this front, López Obrador's tenure was clearly a success. He raised the minimum wage each year, tripling it across his term: it went from 88 pesos (around $5) a day in 2018 to 250 pesos ($15) in 2024. This meant that while four-fifths of Mexican households increased their labour income over his *sexenio*, the gains were especially concentrated among lower-income groups, whose earnings went up by 19 per cent.[15] Another crucial move was to universalize what had previously been Conditional Cash Transfers (CCTs), which meant that social programmes overall went from benefiting 13 million people to reaching 21 million by 2020. Spending on these programmes also went up significantly, trebling from $8 billion to $24 billion by 2023. These measures clearly had some effect, reducing the poverty rate from 43 to 38 per cent, though extreme poverty remained broadly the same, at 9 per cent.[16] Still, there can be little doubt that AMLO delivered at least in part on his promise to reduce Mexico's yawning economic disparities. He also enacted a series of pro-worker labour reforms, which included streamlining the process for forming unions, reducing outsourcing and recognizing the rights of domestic workers.[17] These measures fostered a new wave of unionization and labour militancy, including wildcat strikes at *maquiladoras* in the north that won impressive wage increases in 2019.[18]

The overall economic picture is also broadly positive. Since the sharp downturn caused by the Covid recession in 2020, annual GDP growth has averaged above 4 per cent, and inflation has remained relatively manageable at an annual average of 4 per cent. Formal unemployment is at a historic low of 2.7 per cent, though the size of the informal sector—estimates range as high as 55 per cent of the labour force—should qualify this achievement.[19] The wave of 'nearshoring' by US companies played its part in driving these trends, as corporations made use of *maquiladoras* to circumvent growing restrictions on direct imports to the US from China. But AMLO's investments in colossal infrastructure projects also played a crucial role. The Maya Train in the Yucatán Peninsula, some 1,500 km long and costing $28 billion; the Dos Bocas oil refinery in Tabasco;

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[15] Viri Ríos, 'How Did Mexico Reduce Income Inequality?', *El País*, 15 February 2024.
[16] Poverty figures from INEGI; see also Rafael López, 'Aumentan 65 per cent beneficiarios de planes sociales', *Milenio*, 23 October 2020 and Vanessa Rubio, 'AMLO's Big Fiscal Push Could Help Morena', *Americas Quarterly*, 24 October 2023.
[17] Edwin Ackerman, 'The AMLO Project', NLR–*Sidecar*, 5 June 2023.
[18] Paolo Marinaro and Dan DiMaggio, 'Strike Wave Wins Raises for Mexican Factory Workers', *Labour Notes*, 27 February 2019.
[19] Unemployment and informal sector figures from INEGI.

and the Interoceanic Corridor, an overland shipping route across the Isthmus of Tehuantepec, between them spurred strong growth in manufacturing and construction. Since 2020, real value added has risen by 6 per cent and 15 per cent in these two sectors respectively, with many of the gains coming in the poorer south of the country. Between 2020 and 2023, indeed, the south consistently grew faster than the north, reversing a historic trend.[20]

These material gains and López Obrador's explicit focus on inequality quickly helped consolidate Morena's base, as well as giving it a more marked class profile than before. As Edwin Ackerman has observed, in 2018 the working-class vote was spread across different parties, but by the 2021 midterm elections this had changed. Morena's support among those with only primary education had risen markedly, even as it had waned among university-educated voters. By 2023, AMLO's approval ratings were strongest among informal workers and peasants (69 per cent) and lowest among businessmen and professionals (41 and 34 per cent respectively).[21] The consolidation and increasingly working-class tilt of AMLO's base is one of the secrets of his popularity which, rather than crumbling over time, has sunk deeper roots.

This in turn also testifies to his success in constructing a new political consensus, winning adherents to the project of the 4T. 'Republican austerity' has been vital to that process, both as an ideological device and a budgetary tool. For López Obrador, slimming down the state apparatus was not a matter of reducing state capacity but rather intended to increase it, by eliminating corruption and wastage of funds and reducing the layers of mediation between the state and the people it should be designed to serve. In his first year, the Interior and Communications ministries cut expenditures by half, the tourism ministry by two-thirds, the National Electoral Institute by a third and the agricultural ministry by 13 per cent.[22] He also imposed 'voluntary' pay cuts of 25 per cent on public-sector workers and abolished several sub-secretariats. While AMLO's economic policies favoured lower-income groups, the initial

[20] Joseph Politano, 'Mexico's Investment Boom', *Apricitas Economics*, 11 March 2024; Rich Brown, 'AMLO's Bet on Mexico's South Is Paying Off—For Now', *Americas Quarterly*, 5 March 2024.
[21] Ackerman, 'The AMLO Project'; 'Aprobación presidencial promedio abril 2023', Mitofsky poll for *El Economista*, April 2023.
[22] Carlos Elizondo Mayer-Serra, *Y mi palabra es la ley: AMLO en Palacio Nacional*, Mexico City 2021, p. 218, Table 3.6.

burden of many of his cuts tended to fall on the middle or upper-middle classes. This clearly contributed to the shifting social profile of his support base, and at the same time reaffirmed the class nature of the Morena project.

## Oppositions

López Obrador's 'republican austerity' also involved a bid to bring an end to the pact of complicity between Mexico's ruling classes and its intellectual and cultural elites. Breaking with the previous practice of PRI and PAN governments alike, he removed state support from a number of private media and publishing ventures, prompting howls of protest. In 2019, he revealed the names of dozens of journalists whose outlets had benefited from the government's advertising budget under the previous two presidents, and in 2020, he did the same for the magazines *Nexos* and *Letras Libres*, the latter owned by liberal impresario and AMLO critic Enrique Krauze.[23] To these sums we could add the much more generous 'service contracts' and advertising spending previously allotted to private media conglomerates such as Televisa and TV Azteca. Though they still dominate the airwaves, media opposition to AMLO spread across a wider range of platforms, while political attacks were often orchestrated by figures such as the businessman Claudio X. González.

Budget cutbacks were in any case not the real reason for the aversion most of the country's cultural and intellectual elites felt towards López Obrador. Most of them viscerally rejected him from the outset, as the representative of a populism that had to be fended off at all costs. After the entire political establishment came crashing down in 2018, the majority of the intellectual and cultural elites adopted an oppositional discourse that fixated on AMLO's persona—his use of language, his apparently dictatorial whims and alleged thirst for ever more power—insistently accusing him of 'polarization' while distracting attention from his attempts to tackle inequality. The tenor of these critiques grew increasingly shrill over time, such that talkshows, newsstands and bookshops became filled with warnings of impending totalitarianism or societal collapse. The distance between these delusions and reality only served to

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[23] 'AMLO Leaked the Names of Journalists Benefited by His Predecessor, Unleashing a Major Scandal in Mexico', *La Política online*, 25 May 2019; Arturo Rodríguez García, 'López Obrador exhibe cuánto recibían *Nexos* y *Letras Libres* por publicidad', *Proceso*, 8 September 2020.

further discredit the opposition, and was itself a factor in consolidating AMLO's base: the welter of critical voices preaching from on high would have confirmed the idea that his project was making headway against entrenched privileges.

López Obrador's use of language did reaffirm the class complexion of his administration, as part of a wider media strategy designed to enable him to push back against heated opposition from privately owned newspapers and TV outlets. In his daily press conferences, held at 7 am and known as *mañaneras*, López Obrador actively set the national political agenda and consciously adopted a populist style and discourse. He travelled the country, and often his *mañaneras* would be held in rural areas few Mexican presidents would previously have visited. He would describe his opponents as *fifís*—an old slang term for wealthy elites—and *señoritingos*, 'little aristocrats', while peppering official speeches with colloquial terms and phrases such as '*fúchila*' (yuck) or '*me canso ganso*' (a nonsense rhyme meaning roughly 'you can be sure of it').

This populist idiom prompted waves of indignation in Mexico's commentariat. According to these critics, AMLO is 'conceptually primitive', he knows only 'fifteen phrases', his Spanish is 'impoverished, anachronistic', but also full of barbarous neologisms.[24] There's an obvious class disdain behind these reactions, all too often extended to AMLO's supporters. Starting in the 2000s, López Obrador was sometimes referred to as 'El Peje', after the Mexican word for the tropical gar, a species of fish found in Tabasco; his opponents have been known to describe his supporters as '*pejezombies*', presumably incapable of rational thought. Other labels the opposition uses include *chairos*, a pejorative word for pseudo-leftists, and more obviously class- and race-inflected terms such as *naco*, roughly translatable as 'lower-class', 'vulgar', 'uncivilized'. The sheer snobbery on display here betrays the privileged class positions of López Obrador's opponents, who for the same reason have access to many more media platforms than his supporters. That disproportion has warped perceptions of his administration outside Mexico, where establishment outlets tend to reproduce what circulates within the echo chamber of Mexico's commentariat. Nevertheless, as with any government, there are valid criticisms to be made of his tenure, and weighing

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[24] Cited in David Bak Geler, *Ternuritas: El linchamiento lingüístico de AMLO*, Mexico City 2023, p. 51.

these deficiencies alongside his achievements is essential to grasp the underlying character of the 4T.

## Gauging the 4T's shortcomings

Many of the more legitimate critiques of López Obrador centre on drawbacks that accompany several of his apparent achievements. The Maya Train, for example, sparked vocal opposition because of its damaging effects on local indigenous communities and the environment, not to mention the archaeological heritage to which it was designed to provide easier access. The Dos Bocas refinery has gone more than twice over budget, at a cost of $19 billion, and after many delays has barely begun to refine any oil, though AMLO ceremonially opened it in July 2022. This huge investment in refining capacity comes at a time when the national oil company, PEMEX, is in deep financial trouble, with debts totalling $102 billion, while its production has been steadily declining for over twenty years.[25]

AMLO funded these projects in large part through debt and sweeping cuts elsewhere. His version of austerity did involve efforts to improve tax collection, but there was no major tax reform. As a result, Mexico still gathers the equivalent of just 17 per cent of GDP from taxation, the lowest in the OECD, and less than half the average. (The figures for the US and UK are 27 and 34 per cent respectively.)[26] While poverty declined, Mexico's mega-rich continued to do very well under his rule, with the country's five wealthiest billionaires gaining $79 billion.[27] In the meantime, despite their streamlining intent, his cutbacks severely impacted the state's capacity to deliver basic public services. In 2020 López Obrador vowed that Mexico would soon have a health system as good as that of Denmark, but it has been left in poor shape, with badly organized changes to state insurance and procurement processes leaving hospitals short of supplies and millions waiting for treatment and medicines. Hospitals run by the Secretariat of Health suffered budget

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[25] 'Cost of Dos Bocas Refinery Hits US$18.9 Billion', *Mexico Business News*, 4 March 2024; 'Mexico's Pemex Reduces Financial Debt, Increases Refining but Production Falls', *Reuters*, 26 April 2024.

[26] OECD, *Revenue Statistics 2023: Tax Revenue Buoyancy in OECD Countries*, Paris 2023, Tables 4.49, 4.73 and 4.75.

[27] Michael O'Boyle, 'Mexico's Billionaires Piled Up Riches as AMLO Raged Against Them', *Bloomberg*, 9 April 2024.

cuts of 37 per cent, while according to official data, the number of unful-filled prescriptions rose more than eightfold from 2018 to 2022, and the number of children without basic vaccines more than tripled over the same period.[28]

The Covid pandemic hit Mexico especially hard: the death toll had reached 50,000 by July 2020, 200,000 by February 2021, and stood at over 300,000 when data collection tailed off in mid-2023, though the numbers are surely an undercount.[29] AMLO's handling of the pandemic made matters worse: he initially minimized the severity of the crisis and continued to travel around the country and hold public gatherings. Refusing to wear a mask himself, he vaunted the protective power of 'a clean conscience' (he then got Covid three times). His government did oversee an effective vaccination programme and, amid vaccine hoarding by wealthy countries, managed to source doses from China and Russia as well as the US and UK (and, later, from Cuba). But on the Covid front as elsewhere, when confronted with damning data he responded with what would become a characteristic phrase: '*yo tengo otros datos*'—'I have other figures.'

López Obrador's adversarial relationship to the press, and to his critics more broadly, became a signature feature of his tenure, and the news cycle in Mexico was often dominated by controversies his remarks created. Much of this, as noted above, was artificially driven by the oppositional media. But some of it stemmed from serious issues, such as his frequent misrepresentations or denials of facts, or his denunciations of one or another journalist—highly irresponsible in a country where journalists are killed with alarming regularity. More recently he described volunteers searching for the bodies of missing people as suffering from 'a delirium of necrophilia'. A certain prickliness or tone-deafness was also apparent in his administration's relation to a range of social movements. Starting in 2019, for example, feminist organizations led

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[28] 'No fuimos Dinamarca: gobierno de AMLO deja sin consulta médica a 46 por ciento de enfermos pobres y sin cirugía a 500 mil personas', *Animal Político*, 4 March 2024; 'No fuimos Dinamarca: gobierno de AMLO deja sin surtir 15 millones de recetas, cinco veces más que Peña Nieto', *Animal Político*, 5 March 2024; and 'Vacunación en México: Gobierno de AMLO dejó a 6 millones de niños sin vacuna; gastó más que Peña Nieto y compró menos', *Animal Político*, 6 February 2024.
[29] Figures from Consejo Nacional de Ciencia y Tecnología: available at datos.covid-19.conacyt.mx.

a series of marches to call for expanded reproductive rights and to protest against Mexico's high levels of gendered violence. On International Women's Day in 2021, they were met with tear gas and police batons, and the National Palace was surrounded by a metal barrier—as eloquent a symbol of AMLO's defensiveness and lack of openness to criticism as his opponents could wish for. He tended to characterize these and other mobilizations as moves to derail the 4T, lumping together a wide variety of people as defenders of the neoliberal status quo. Yet despite a certain personal conservatism, there were important advances in his *sexenio*: a 2019 constitutional reform enshrined the principle of gender parity across all state political roles, building on a 2014 law that had only applied to candidates for office.

But while AMLO's detractors and his supporters alike focus on the changes he has wrought on Mexico, his legacy will mainly be defined by three areas where he largely continued trends begun under his predecessors. On migration, he initially promised a more humane approach to the tens of thousands of people making their way through Mexico to the United States each month. But his government soon began implementing US policy at one remove, tightening the net at its southern border, busing migrants away from the Río Bravo in the north, and detaining migrants in appalling conditions.[30] On the 'drug war' front, López Obrador campaigned on a promise of '*abrazos, no balazos*'—'hugs not bullets'—vowing to provide employment and social programmes for the marginalized youth among whom the narcos recruit. But while the murder rate has declined from its 2020 peak, fatalities continue to rise. The persistent level of violence does not seem to have dented AMLO's popularity—seemingly because most Mexicans don't blame him for a systemic malaise that preceded his arrival in power—but with more than 180,000 homicides since 2018 according to official figures, his presidency has been the deadliest to date.[31]

The main reason for this is that López Obrador intensified the militarized approach taken by Calderón and Peña Nieto before him. In 2019,

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[30] In March 2023, 38 migrants died in a fire after a protest at conditions in a detention centre in Ciudad Juárez; thousands of migrants marched across southern Mexico in protest.
[31] David Saúl Vela, 'Gobierno admite 180 mil asesinatos en el actual sexenio', *El Financiero*, 2 May 2024.

he formed a new security agency, the National Guard, to lead the effort against the drug cartels. But the overwhelming majority of its personnel are former members of the Mexican army, and they essentially replicated its methods, to lethal effect. In 2022, AMLO transferred authority over the National Guard to the Secretariat of Defence, turning an implicit connection into a chain of command. Despite the grim toll, he not only expanded the use of the military for the drug war; he put the navy in charge of ports and customs and tasked the army with several of his infrastructure projects, including the construction of the Tren Maya, dozens of branches of the state-run Welfare Bank, and a new airport for Mexico City in a former military base at Santa Lucía. (This last move came after he cancelled the construction of a new airport at Texcoco, a contract that Peña Nieto had awarded to billionaire Carlos Slim.) López Obrador also doubled the military's budget, while allowing the army to bank handsome profits. Many of the proceeds from the Maya Train will go towards military pensions.[32]

This growing prominence of the military is the third area where AMLO leaves a troubling legacy. Mexico is far from alone in seeing its military acquire a larger role: across much of Latin America, the armed forces are taking over many of the basic functions of policing.[33] The difference is that in Mexico, an avowedly progressive president has actively promoted this trend. He may have done so in the belief that the army was less corrupt and more capable than other branches of the Mexican state. But he also sees the army as a key partner in his project of bolstering the state and defending national sovereignty. Against the left's view of it as an agent of repression, AMLO has more than once described the Mexican army as 'the people in uniform', noting that it 'was born with the Mexican Revolution', and that unlike the armed forces in other parts of the world, it 'does not belong to the oligarchy.'[34]

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[32] Will Freeman, 'Can Mexico's Next President Control the Military?', *Journal of Democracy*, March 2024; Dalila Escobar, 'Las utilidades del Tren Maya serán para pensiones del ISSSTE y Fuerzas Armadas: AMLO', *Proceso*, 18 January 2023.

[33] On this broader trend see Gustavo Flores-Macías and Jessica Zarkin, 'The Militarization of Law Enforcement: Evidence from Latin America', *Perspectives on Politics*, vol. 19, no. 2, June 2021.

[34] 'No militarizamos al país, soldados son pueblo uniformado: AMLO defiende a Fuerzas Armadas', *Animal Político*, 1 December 2021; Dalila Escobar, 'Protejo al Ejército porque es fundamental para el Estado y no es represor: AMLO', *Proceso*, 10 April 2023.

The historical record is, of course, more uneven. Even in its revolutionary origins the Mexican army was both a popular force and a collection of regional fiefdoms; after that it gave rise to progressive figures such as Lázaro Cárdenas but also became a bulwark of Cold War anti-communism, carrying out a counter-insurgency against the left. Today it has a poor and largely indigenous rank-and-file surmounted by a bloated officer class, some of whom are plausibly suspected of involvement in drug trafficking and organized crime. The clear erosion of civilian control over this entity, among other things, bodes ill for anyone the army finds inconvenient. The revelations in 2022 that the Mexican army spied on journalists and legislators using Pegasus software might be just a taste of things to come; likewise the stalling of the investigation into the disappearance of 43 students from Ayotzinapa in 2014, in which army involvement is widely suspected.[35] The army's ability to obstruct justice may extend further back into the past. AMLO came to power promising a truth commission for those forcibly disappeared by the Mexican military from the 1960s to the 1980s, but its independence and remit were quickly curtailed, and while there have been some initiatives to gather testimony and commemorate the victims, the prospect of holding anyone to account still seems remote.

### Situating obradorismo

López Obrador's elevation of the military is just one of the many contradictions of his administration, which have sown confusion among analysts both within Mexico and outside it. On the one hand, he raised incomes among the poorest and assailed the privileges of the wealthy few; on the other he came to power in 2018 having made electoral alliances with former figures from the PRI and with the Social Encounter Party (Partido Encuentro Social, PES), a small right-wing outfit linked to evangelicals that opposed abortion.[36] The combination of social and/or religious conservatism with progressive economic views is not unusual in Latin America, and in that respect AMLO's government is not

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[35] Georgina Zerega, 'El Ejército mexicano investigó a diputados, senadores y gobernadores', *El País*, 4 October 2022 and Mathieu Tourliere, 'Documentos hackeados de Sedena revelan intromisión del general Sandoval en el caso Ayotzinapa', *Proceso*, 3 October 2022.

[36] The PES dropped out of the Morena coalition in 2019, and is scarcely visible as a national force, though from 2018–2024 it retained the governorship of Morelos under former footballer Cuauhtémoc Blanco.

dissimilar to many of the Pink Tide regimes. 'La Morena' is one of the names for the Virgin of Guadalupe, Mexico's national patron saint, and while López Obrador has maintained a deliberate ambiguity about his religious beliefs, he regularly gestures towards Christian moral values—perhaps trying to court Catholic and evangelical voters at the same time, though the former are overwhelmingly greater in number, and clearly a more significant part of his base.

AMLO also invited into his party figures from the PRI *ancien régime* whom the left and most liberals would deem toxic. The most obvious example is Manuel Bartlett, who as interior minister oversaw the 1988 fraud that deprived Cuauhtémoc Cárdenas of victory. In 2018, López Obrador appointed him head of the state-run Federal Electricity Commission, which many saw as a particularly dark joke: thirty years earlier, a power outage had conveniently taken down the vote-tallying computers while Cárdenas was ahead, and when they were switched back on, Salinas was winning. Part of the explanation for why such bargains were struck is simple opportunism on the part of the ex-*priístas*, many of whom saw which way the winds were blowing and jumped across the aisle to join Morena (and were hence labelled *chapulines*, grasshoppers). But it's also the case that the AMLO phenomenon inaugurated a recomposition of the Mexican political landscape, reshuffling previous boundaries and creating new lines of division, and this too is part of what makes the 4T hard to define.

Where exactly on the political map should AMLO be placed? Should his programme and ideology—referred to in Spanish as *obradorismo*—be considered part of the Pink Tide, or as an instance of a more amorphous and ideologically indeterminate 'populist' trend? Does he draw on Mexico's own radical traditions or stand apart from them? López Obrador describes himself as being on the left, and most of his supporters would agree. Thanks in large part to the Mexican media's highly unrepresentative class profile, pro-AMLO voices are considerably fewer in number than those opposed to him, but he does have some prominent and articulate supporters. For figures such as the historian Lorenzo Meyer and the writers Elena Poniatowska and Paco Ignacio Taibo—the latter tapped by AMLO to run the Fondo de Cultura Económica publishing house—López Obrador is Mexico's first democratically elected leftist leader, and represents a historic breakthrough for progressive politics. Columnists Hernán Gómez Bruera, Jorge Zepeda Patterson and the

writers associated with *Sin Embargo* [*However*], the digital news platform Zepeda founded in 2011, are among the few outlets regularly to offer critical support from the left, alongside the Mexican left's mainstay, *La Jornada*, where columnists such as Enrique Galván Ochoa and Pedro Miguel are also broadly supportive of AMLO.

Yet many on the Mexican left see López Obrador as foreign to their cause. The Zapatista movement has been sceptical of him from the outset. In 2006, rather than back his presidential bid, they mounted 'The Other Campaign', an attempt to rally popular forces around a non-electoral agenda. In 2017, the Zapatistas switched tack and backed a presidential run by María de Jesús Patricio Martínez (Marichuy), candidate of the National Indigenous Congress; though the campaign fell afoul of the National Electoral Institute's rules, for a segment of the Mexican left Marichuy, rather than AMLO, was the left's standard bearer. These currents of opinion, ranging from autonomists to Marxists of various stripes, remained critical of López Obrador once he was in power. Carlos Illades, a historian of Mexican socialism and communism, sees AMLO as a conservative figure, and the 4T as no more than an 'imaginary revolution'; López Obrador 'had the chance to make a substantive change in the country and he wasted it.'[37] For Marxist political theorist Massimo Modonesi, the 4T was built not on an intensification, but a dampening down of social struggles, and its conservative elements and centralizing tendencies make it comparable to other instances of Gramscian 'passive revolution'.[38]

But the vast majority of the anti-AMLO consensus, stretching from left-liberals to conservatives, stands to the right of the government. Many of its foundational tropes—his supposed megalomania, his irresponsible brand of leftism, his backward-looking provincialism—were laid down by Enrique Krauze in a 2006 essay that characterized López Obrador as a dangerous leftist demagogue in the mould of Hugo Chávez, and warned against electing this 'tropical messiah'.[39] Since then, the crises of liberal

[37] Carlos Illades, *La revolución imaginaria: El obradorismo y el futuro de la izquierda en México*, Mexico City 2023.

[38] Massimo Modonesi, 'La hegemonía del centro obradorista (centralidad, centrismo, centralismo)', *Revista Común*, 15 March 2023; and Modonesi, 'La pax obradorista', *Jacobin América Latina*, 1 June 2024.

[39] Enrique Krauze, 'El mesías tropical', *Letras Libres*, 30 June 2006.

democracy in the global North have equipped Mexico's commentariat with additional tropes, such as the 'strongman' and a hazily defined 'populism'. Political scientist and talking head Denise Dresser, for example, describes AMLO as an 'authoritarian populist' along the lines of Trump, Orbán and the like, who has 'undermined democracy'; in the run-up to the 2024 election she described Sheinbaum's likely win as amounting to a 'vote for autocracy'.[40]

For many of López Obrador's critics, Morena's rise to power is not a historic novelty but a baleful recurrence of the PRI's one-party system. In May 2024, some 200 intellectuals and cultural figures signed an open letter announcing their support for the PAN/PRI/PRD candidate Xóchitl Gálvez, on the grounds that she represented the best means of defending 'democracy' against an 'authoritarian regression'.[41] Among the signatories was Roger Bartra, a self-professed social democrat, who views AMLO as a 'retropopulist' who has done no more than give a progressive sheen to a familiar brand of statist nationalism. In 2021 Bartra, the author of a 1987 book on Mexican national identity titled *The Cage of Melancholy*, published a critique of López Obrador called *Return to the Cage*, in which he decried his ascent as part of a lingering authoritarian inheritance.[42] Others have looked still further back for precedents, labelling AMLO a '*tlatoani*', the Nahuatl word for 'sovereign'.

It's true that many of López Obrador's policies seem drawn from an earlier epoch. Big projects such as the Dos Bocas refinery or the Interoceanic Corridor are reminiscent of the PRI in its mid-twentieth-century developmentalist phase, and his insistence on oil as the 'lever of development' echoes any number of petro-nationalist governments, but particularly that of Lázaro Cárdenas, who faced down US oil companies and nationalized their assets in 1938. AMLO's populist idiom and some of his presidential habits also recall those of Cárdenas, who was famous

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[40] Denise Dresser, 'Mexico's Vote for Autocracy', *Foreign Affairs*, 17 May 2024; see also Dresser, *¿Qué sigue? 20 lecciones para ser ciudadano ante un país en riesgo*, Mexico City 2023.

[41] 'Integrantes de la comunidad cultural a favor de Xóchitl Gálvez', *Letras Libres*, 20 May 2024. Other signatories included liberal pundits Enrique Krauze, Gabriel Zaid and Héctor Aguilar Camín, and Jorge Castañeda, foreign secretary under Vicente Fox.

[42] Roger Bartra, *Regreso a la jaula: El fracaso de López Obrador*, Mexico City 2021.

for touring the country and for his popular touch. The historical parallels AMLO himself draws go further back, and have nothing to do with the PRI—as we've seen, the 4T is set alongside Mexican independence, Juárez's Reforms and the Revolution.

Yet if these analogies tell us anything, it's that López Obrador represents something entirely different. The main distinction between the 4T and its chosen precursors, for example, is that the latter coincided with cataclysmic upheavals—civil wars, foreign invasions, revolutions—and involved vast popular mobilizations, as well as heavy casualties and severe economic dislocations. In each case, the country that emerged was renewed, but also in ruins. AMLO's ascent was nothing like this: he and his party were democratically elected, and for all the vociferous complaints of their opponents, have acted within the constitutional system. He has regularly spoken of a 'revolution of consciences', but that's about as far as his calls for insurgency go. The most obvious difference between Morena and the PRI, meanwhile, is that where the PRI spent decades rigging elections within a system it had itself constructed, Morena has won free and fair elections under rules established by its opponents. That success is crucial to understanding *obradorismo*, and it is all too often overlooked amid the contention over AMLO himself. Six years on from the shocking breakthrough that carried it to power, Morena seems likely to remain the dominant political force in Mexico for some time to come. How did a movement that was only established in 2011, and only became a registered party in 2014, achieve that status so quickly, and how does its success help us place the 4T in comparative context?

## Morena in perspective

While Mexico's commentariat and most foreign coverage tend to dismiss Morena as a vehicle for AMLO's personal ambitions, Sheinbaum's thumping win and the party's continued grip on congress and two-thirds of Mexico's state governments show it is far more than that.[43] Organizationally, the foundations for the movement were laid as early as the late 2000s. Between 2007 and 2009, López Obrador held meetings in 2,456 municipalities to rally support for his 'Legitimate Government',

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[43] There is an astonishing lack of literature on Morena. The one serious book-length study, Quintanar's *Las raíces del Movimiento Regeneración Nacional*, was published in 2017—i.e. before it came to power—and focuses on its origins and formation.

and the local committees created in their wake laid the basis for Morena's territorial structure when it was formed in 2011.[44] Ideologically, its core precepts likewise coalesced during the Calderón administration, as a variety of progressive intellectuals worked with AMLO to develop an 'Alternative National Project' in the run-up to the 2012 elections. This was an ambitious anti-neoliberal agenda premised on a recovery of state capacity, anti-corruption and use of the energy sector to drive national development. The movement's name, meanwhile, came from the newspaper *Regeneración*, founded in 2010 as the organ of a still-embryonic organization—its title a nod to the anarchist publication put out clandestinely by the Flores Magón brothers in the early 1900s, signalling an affinity with Mexico's revolutionary traditions.[45]

Though López Obrador and other candidates affiliated with Morena ran under the PRD's banner in 2012, the PRD's own rightward drift and willingness to make deals with the PAN and PRI meant that a split was inevitable. In November of that year, after delegates were elected from local committees across the country, Morena held a national congress at which it officially became a party, obtaining the INE's registration in 2014.[46] The nationwide infrastructure it built over the preceding years gave Morena a formidable electoral base, but its mechanisms for internal debate and policymaking have remained ungainly and often opaque, leading to recurrent tensions between the rank-and-file and the leadership.[47] Nevertheless, its growth has been impressive: according to the INE's official data, Morena now has some 2.3 million registered members, almost a million more than the PRI and close to ten times more than the PAN. (Interestingly, in all the parties except the PAN women significantly outnumber men.) In absolute terms, Morena is more than six times the size of the UK Labour Party or Germany's SPD, and three

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[44] Quintanar, *Las raíces del Movimiento Regeneración Nacional*, pp. 245, 269.

[45] Quintanar, *Las raíces del Movimiento Regeneración Nacional*, pp. 250–7.

[46] Quintanar, *Las raíces del Movimiento Regeneración Nacional*, pp. 316–39.

[47] In 2022, for example, one militant's analysis of the party's National Convention complained that the leadership had not allowed informed discussion or dialogue in formulating policies. 'Democracy in Morena cannot be the same as that generated by neoliberalism's structures. Form is content, and if the content isn't transformed, the same vices that destroyed the PRD will eat away the foundations if action is not taken soon.' Teodoro Rodríguez Aguirre, 'Convención Nacional Morenista: una ruta hacía la democratización', *La Voz de las bases morenistas*, morenademocracia. mx, 24 August 2022.

or four times bigger if we adjust for the size of these countries' voting populations. In relative terms, it is twice the size of Brazil's PT.[48]

In regional perspective, Morena could be seen as a belated version of the Pink Tide phenomenon that swept across much of Latin America in the 2000s. Like many of those progressive governments—Chávez, Morales, Correa—López Obrador was able to construct a viable electoral project that explicitly aimed to overthrow the reigning neoliberal consensus. Like Chávez and Correa, he came to power amid the ruins of the established party system, the sharp decline of the PAN, PRI and PRD comparable to the implosion of the Punto Fijo Pact between Venezuela's three main parties. AMLO's project, too, was founded on a convergence of the left with other social and political strands, at once broadening the left's electoral reach and pluralizing its ideological lineage. Like the Pink Tide leaders, López Obrador has also been the target of a ferocious, personalized media barrage—though here the similarity is properly between the all-out strategies of the Mexican and Venezuelan oppositions, the real architects of the 'polarization' they decry, rather than between the progressive leaders themselves. Yet AMLO and Morena stand out from these regional peers in other ways. Brazil's PT emerged out of labour's struggles against the dictatorship in the 1970s and 80s, while in Bolivia the MAS similarly developed out of a longer arc of indigenous resistance and *cocalero* militancy before attaining power in the 2000s.[49] Yet while it lacks the historic depth of those movements, Morena is more institutionalized and less personalized than *chavismo*'s Fifth Republic Movement (MVR) or its successor, the United Socialist Party of Venezuela (PSUV), and it has dominated within its own coalition far more than Rafael Correa's Alianza País managed to do.

Indeed, the speed and scale of Morena's growth mark it out from the Pink Tide governments. These features in turn are symptoms of the profound

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[48] Calculations based on figures from 'Padrón de Afiliados a partidos políticos', INE (Mexico, 2023 data); Toby Helm, 'Labour Membership Falls by 23,000 over Gaza and Green Policies', *Guardian*, 30 March 2024; Philipp Richter, 'Sozialdemokratische Partei Deutschlands', Bundeszentrale für politische Bildung, 7 May 2024; 'Filiação partidária da eleição', Tribunal Superior Eleitoral, tse.jus.br (Brazil, 2022 data).

[49] On the early PT see Emir Sader and Ken Silverstein, *Without Fear of Being Happy: Lula, the Workers Party and Brazil,* London and New York 1991; on the MAS see Forrest Hylton and Sinclair Thomson, *Revolutionary Horizons: Past and Present in Bolivian Politics,* London and New York 2007.

crisis of the neoliberal order over which the other parties in Mexico presided, as well as of its belated character—as if the long build-up of discontents contributed to the abruptness of the neoliberal implosion. The collapse of Mexico's established parties is the other side of the same coin, handing Morena a hegemonic position for which it scarcely had time to prepare. The suddenness of the other parties' decline accounts for the lack of serious explanations for Morena's popularity among so many of AMLO's critics: their entire framework for understanding Mexican politics was dismantled overnight, and they have largely been unable to develop new ways of seeing such a radically altered landscape. This is also why their commentary so often tends to take an apocalyptic tone: from where they stand, the end of their world looks like the end of everything.

That crisis of neoliberalism is ongoing, and in Mexico as elsewhere, there is little clarity about what might come next. AMLO's ambiguities reflect that wider disorientation: his political eclecticism—his combination of left-wing policies and conservative cultural stances—is to some extent an expression of this confused interregnum, as new parties such as Morena try to cobble together unlikely electoral coalitions across a shattered social terrain. Mapping a government like this one onto a left–right spectrum, or checking its policies off against a predetermined list of 'left' characteristics, contributes little to an understanding of its project. The centrality of anti-corruption to the 4T is a good example of this: while it often targets the powerful, it's more of a moral agenda than a political one, and it has been ideologically polyvalent (as witness the effects of the Lava Jato case in Brazil). It's also a kind of evasion, designed to rally support for redistribution while avoiding outright class war. AMLO has certainly begun to address inequality, but he hasn't used his mandate to raise taxes on the wealthy, for example.

In that sense, López Obrador is attempting to square the same circle as many of the Pink Tide governments, elected with a popular mandate to reverse deep inequalities but confronting the massed defences of entrenched and well-resourced elites.[50] But the macroeconomic context in which AMLO was elected was much less propitious than it was for most of the Pink Tide administrations, who benefited from the 2000s super-cycle of commodity prices. In terms of the material constraints

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[50] For a view of this problem through the lens of theories of state power, see Juan Carlos Monedero, 'Snipers in the Kitchen', NLR 120 November–December 2019.

under which it has had to operate, López Obrador's government is perhaps more comparable to those of the 'Pink Tide 2.0', for example Lula's current administration, which from the outset adopted an orthodox fiscal framework to appease capital. But as André Singer and Fernando Rugitsky have noted, politically AMLO enjoyed much more room for manoeuvre, thanks to Morena's much greater weight in the Mexican congress compared to the PT.[51] The same factor distinguishes López Obrador from the governments of Gustavo Petro in Colombia or Gabriel Boric in Chile, both of whom arrived in power with slim governing majorities and immediately found themselves politically embattled. The 4T has elicited noisy opposition, to be sure, but that has not been matched by any sustained electoral challenge, and the congressional leeway AMLO possessed has even been enhanced under Sheinbaum.

Summing up *obradorismo*'s core commitments, we might stress its rehabilitation of the state as agent of development, its willingness to tackle inequality, its moral framing of corruption as an attack on the public good, and a commitment to fiscal responsibility. The common principles through which these have been conjugated are sovereignty and improving the well-being of the popular classes. That such an agenda will generate contradictions should go without saying; but that it amounts to a broadly coherent project with mass appeal cannot be gainsaid. Viewed from another comparative angle, the 4T could be taken as another iteration of the 'national-popular' regimes that arose in Latin America in the 1930s to the 1950s, from Cárdenas in Mexico to the MNR in Bolivia, which combined an anti-imperialist emphasis on sovereignty with redistributive measures and moves to challenge the hold of oligarchic elites.[52] These regimes too were ideologically heteroclite, and mixed top-down or centralizing impulses with genuine mass participation (and were often rejected by parts of the left at the time, only to be recuperated later).[53] Their ambiguity, indeed, stemmed in part from the fact that they

[51] André Singer and Fernando Rugitsky, 'Slow Motion Lulismo', NLR–*Sidecar*, 8 January 2024.
[52] For a brief comparison of 'national-popular' regimes and the Pink Tide, see Carlos Vilas, 'La izquierda latinoamericana y el surgimiento de regímenes nacional-populares', *Nueva Sociedad*, no. 197, May–June 2005. The classic theorization of this Gramscian concept for Latin America remains René Zavaleta, *Towards a History of the National-Popular in Bolivia, 1879–1980*, Kolkata 2018 [1986].
[53] For a positive reading of Cárdenas, see Adolfo Gilly, *El cardenismo. Una utopía mexicana*, Mexico City 1994.

ushered in simultaneous processes of, on the one hand, 'nationalization and democratization of the state' and, on the other, 'reconstruction of its oligarchic core.'[54]

With the caveats that all cross-temporal comparisons demand, both the 4T's successes to date and its deficiencies might be traced to similar structural features, which in its case derive from the incomplete unravelling of the neoliberal order. For much the same reason, AMLO has been rather less ambitious than Latin American populist regimes have historically tended to be—hence there has been no confrontation with foreign or domestic capital on the scale of Cárdenas's or the MNR's nationalizations. While he and Morena claim to have undone neoliberalism, in practice they have made a virtue out of many of the constraints it left behind, and the motley framework that has resulted looks set to persist under his successor.

### *'It's Claudia'*

Where López Obrador's political trajectory took him from dissidence within the PRI to struggle against it, Claudia Sheinbaum was formed more squarely within the left. Her grandfather, Chone Sheinbaum, emigrated from Lithuania to Mexico via Cuba in 1928 and was a member of the Mexican Communist Party, while her father Carlos was in Mexico's Communist Youth. He and Claudia's mother, Annie Pardo, were both closely involved in student activism in the 1960s at UNAM, which culminated in a student strike that the PRI government brutally repressed in October 1968.[55] When Sheinbaum, who was born in 1962, describes herself as a 'daughter of 68', she is placing herself within this radical tradition.

In the early 1980s Sheinbaum joined the presidential campaign of Rosario Ibarra de Piedra, whose son had been forcibly disappeared by the Mexican military in 1974, and in 1986–87 she took part in another important strike at UNAM in defence of tuition-free education. After a

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[54] Anne Freeland, 'Translator's Afterword', in Zavaleta, *Towards a History of the National-Popular*, pp. 295–6.

[55] Cecilia González, 'La "hija del 68" que quiere gobernar México', *Nueva Sociedad*, March 2024; Noah Mazer, 'Claudia Sheinbaum's Radical Jewish Heritage', *Jacobin*, 10 June 2024; and Víctor Jeifets and Lazar Jeifets, *América Latina en la Internacional Comunista, 1919–1943: Diccionario biográfico*, Santiago de Chile 2015, pp. 572–3.

doctorate in environmental engineering, she began a career in academia in the 1990s, but in 2000 AMLO invited her to work alongside him as environment secretary for Mexico City's government. While her main tasks were to reduce emissions and improve air quality in the choking metropolis, López Obrador entrusted her with his key infrastructure project, the second storey on the Periférico. She has been one of his closest lieutenants since then, acting as his spokesperson in the 2006 presidential campaign, leading his challenge against the results, and even serving in his parallel 'legitimate' cabinet. She still found time to work for the Intergovernmental Panel on Climate Change, contributing to its 2007 and 2013 reports.

A member of the PRD from its launch in 1989, Sheinbaum was among the founders of Morena in 2011, and has been a key figure in its construction of a project for national power. She first won elected office in 2015 as its candidate for the mayoralty of Tlalpan, a borough in the south of Mexico City. Three years later, in 2018, she ascended from there to the governorship of the capital as a whole, a position that then served as her springboard for the presidency, as it had done for AMLO before her. Her time in charge of Mexico City was quietly competent: she handled the pandemic notably better than the president did, set up several new educational institutions and community centres across the city, and made some infrastructural improvements as well as increasing the use of sustainable energy for public transport.

Although presidential campaigning was not supposed to begin until March of this year, Morena's primary process, held in June 2023, enabled Sheinbaum to raise her profile nationwide. López Obrador did not publicly endorse her as such, but his preference was an open secret—leading to accusations that he was bringing back the PRI's *dedazo*, the 'pointing of the finger', whereby the incumbent named his successor. Her two main rivals for the Morena nomination were former foreign secretary Marcelo Ebrard, also governor of Mexico City from 2006–2012, and Adán Augusto López Hernández, formerly interior minister. While either would have represented forms of continuity for the 4T, Sheinbaum is both personally and ideologically closer to AMLO. Even as her rivals complained that the playing field wasn't level, ads consisting simply of the words 'It's Claudia' began to appear on walls and billboards across the country, adding to the sense of inevitability about her journey to the National Palace.

With Sheinbaum's victory on 2 June—her vote tally of just under 36 million surpassing AMLO's 2018 score by almost 5 million—Mexico has its first woman president, more than seventy years after female suffrage was finally introduced. Her administration, due to take office in October, will have more room for manoeuvre than AMLO's did, with the elections delivering Morena and its allies a super-majority in the Chamber of Deputies and close to the same in the Senate. Final results will not shake out till August, but Morena alone will likely have 247 of 500 deputies, while its coalition partners, the PT and PVEM—the latter, previously a longstanding appendage of the PRI, gives opportunism a bad name—add another 50 and 75 deputies respectively, for a total of 372. This compares to only 102 for the PAN, PRI and PRD combined—the PRI down to 33 deputies and the PRD reduced to a single deputy. These are staggering denouements for the former ruling party and the one-time standard bearer for democratization; the PRD did so poorly that it lost its deposit and faces extinction as a national party. In the Senate, Morena has 60 of the total 128 seats, with the PVEM and PT adding another 23. Morena also won 7 of the 9 state governorships being contested, crucially including that of Mexico City. Morena aside, the other party to make relative gains was the Third Way-ish Citizen's Movement, which wisely steered clear of the PRIAND alliance and improved its vote share and seat tally markedly, though it remains small, with 23 deputies and 4 senate seats. Across the country, a total of close to 21,000 posts were in play on 2 June, with seats in state-level congresses and local and municipal governments also being contested. Morena gained majorities or even supermajorities in many of these chambers, too.

For the opposition, the shock administered in 2024 was if anything more traumatic than that of 2018. While few expected Gálvez to win, the scale of Sheinbaum's win prompted stupefied denials and bouts of classist fury from much of the commentariat. Liberal pundit Héctor Aguilar Camín referred to those who voted for Morena as 'low-intensity citizens' and could not comprehend how they could have been seduced by mere material interests; one talk-show guest, inspired by the post-apocalyptic *Planet of the Apes* films, said those voting for Morena had 'given a rifle to a monkey'. The country's well-off vowed to punish Morena's supporters by no longer tipping in restaurants.[56] Denise Dresser, in a masterpiece of

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[56] Murray and Stott, 'Mexico's Elite Struggles to Comprehend Left's Landslide Election Win'.

self-aggrandizement, professed herself 'saddened because the majority of my compatriots have put back on the chains we had taken off them'. In giving Morena such an emphatic win, the people, it seems, had failed to understand the real nature of democracy.[57] Perhaps the most brazenly disingenuous response of all came when the PRI, seemingly forgetting its own lengthy record, complained that AMLO had made improper use of state power to influence the elections.

What will Sheinbaum do with her resounding mandate? On the campaign trail she vowed to 'build the second storey' of the 4T, and her platform promised the continuation of 'republican austerity' and fiscal discipline, as well as further increases in the minimum wage and an annual GDP growth target of 3 per cent.[58] Keeping a tight lid on debt appears to be a key goal, and with the markets initially panicking at the scale of her win, Sheinbaum was quick to announce that AMLO's finance minister, Rogelio Ramírez de la O, would continue in his post. The president-elect also plans to extend to the national level policies she enacted in Mexico City, including scholarship programmes and investment in sustainable energy. This last is likely to clash most with the petro-developmentalist preferences of her predecessor, and with her own plans to build more road and rail infrastructure to drive growth. Overall, she is likely to be less culturally conservative than López Obrador, and more internationally oriented. On that front, her victory may well bolster the region's left in the face of the wider right-wing upsurge.[59] Domestically, she will stick to the main planks of *obradorismo*, and though the simple fact she is not AMLO may ease tensions, for Morena's critics to moderate their stances would require a degree of reflection and self-awareness they have yet to display.

In the short run, the most contentious item on Sheinbaum's agenda is a set of constitutional reforms previously mooted by AMLO. These include making Supreme Court judges and key electoral authorities elected offices. The prospect of these key institutional bulwarks being

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[57] As one astute comment noted, the opposition were 'not prepared . . . for the abstract people to be composed, in reality, of concrete voters.' Ariadna Acevedo-Rodrigo, 'Ciudadanos inesperados. El voto y la igualdad', *Revista Común*, 13 June 2024.

[58] 'Presenta Sheinbaum 100 compromisos de su Proyecto de Nación', *La Jornada*, 1 March 2024.

[59] A point well made by Daniel Kent Carrasco, Diego Bautista Páez, Diana Fuentes and Francisco Quijano in 'The Mexico of Claudia Sheinbaum', NACLA, 10 June 2024.

reshaped by popular consent was what prompted many of the opposition's warnings of impending 'autocracy'; López Obrador is keen to push these through before he leaves office—he will have a few months with the new congressional supermajority—but Sheinbaum may try to stall in order to smooth her first months in power.

The major constraints on Sheinbaum remain those that have hampered her predecessors: a lack of fiscal breathing space, an uncertain macro-economic environment and an upward curve of drug war violence. This election was the most violent in the country's history, with 95 candidates or campaign staffers from all parties killed and dozens more threatened by criminal actors.[60] Then there is the question of AMLO himself: will he really retire from public life, or will he pull strings from behind the scenes? As so often in Mexico's history, though, the forces that will most strongly shape its future derive from its proximity to the US, destination for the northward movement of drugs and people, source of a southward flood of weapons and cash. Several Republicans have called for armed intervention in Mexico to combat drug gangs, and it's possible a second Trump administration would opt for such a deranged scenario. But whichever of Biden or Trump wins in November, Mexico is already a battleground. On 21 April, while Sheinbaum was campaigning in rural Chiapas near the border with Guatemala, her car was stopped on the road by a group of masked men. It could have been one of any number of groups competing for control of local smuggling or migration routes. As it turned out, they were people from the nearby town of Motozintla who had set up roadblocks to combat the influence of the gangs. They asked Sheinbaum to 'clear the road' to nearby Frontera Comalapa, since at present they get 'torn to pieces' by criminal bands if they use it, and to 'remember the highlands, remember the poor' when she became president. They then apologized, thanked her for her time and sent her on her way.

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[60] 'Violencia Electoral 2023–24', LaboratorioElectoral.mx.