

# PLEBISCITARIANISM AND STATE CAPACITY EROSION IN MEXICO

## *Plebiscitarianismo y Erosión de la Capacidad Estatal en México*

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### ABSTRACT

Mexico's political system is currently facing two strong stress tests: first, the arrival to power in 2018 of Andrés Manuel López Obrador (AMLO), a populist leader who frequently pushes the limits of conventional democratic norms, has opened questions about the resilience of horizontal mechanisms of accountability and separation of powers. This is a democratic backsliding challenge. Second, the country is facing a long-term security crisis that has created concerns about the ability of the Mexican state to effectively control its territory and has brought an encroachment of the armed forces on civilian affairs, extending well beyond security matters. This is primarily a state capacity challenge. While the two of them respond to different causes, in this paper I suggest that they have become intertwined: the relative resilience of democratic checks and balances seems to have pushed AMLO and the ruling party (MORENA) to seek new strategies to consolidate their power that are likely eroding state capacity. Analyzing several events of political significance that occurred in 2022, I show that the risks of significant democratic backsliding are relatively contained in present day Mexico and have perhaps been overestimated, but the challenges besieging state capacity and civilian control of the military are likely deeper and their imprint will be long-lasting.

**Keywords:** state capacity, democratic backsliding, populism, militarization

### RESUMEN

*El sistema político de México actualmente se enfrenta a dos fuertes pruebas de estrés: en primer lugar, la llegada al poder en 2018 de Andrés Manuel López Obrador (AMLO), un líder populista que frecuentemente desafía los límites de las normas democráticas convencionales, ha planteado preguntas sobre la resiliencia de los mecanismos horizontales de rendición de cuentas y separación de poderes. Esto supone un desafío de retroceso democrático. En segundo lugar, el país enfrenta una crisis de seguridad a largo plazo que ha generado preocupaciones sobre la capacidad del estado mexicano para controlar efectivamente su territorio y ha llevado a una incursión de las fuerzas armadas en asuntos civiles, que se extienden más allá de los temas de seguridad. Esto es principalmente un desafío de capacidad estatal. Aunque ambos responden a causas diferentes, en este documento sugiero que se han entrelazado: la relativa resiliencia de los controles y equilibrios democráticos parece haber llevado a AMLO y al partido gobernante (MORENA) a buscar nuevas estrategias para consolidar su poder que probablemente estén erosionando la capacidad estatal. Analizando*



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*varios eventos de importancia política ocurridos en 2022, muestro que los riesgos de un retroceso democrático significativo están relativamente contenidos en el México actual y tal vez se han sobreestimado, pero los desafíos que acosan a la capacidad estatal y al control civil de la milicia probablemente son más profundos y dejarán una huella duradera.*

*Palabras clave:* capacidad estatal, erosión democrática, populismo, militarización

## I. INTRODUCTION

On April 22, 2022, around 16.5 million Mexicans, or 18% of all eligible voters, went out to the polls on the first Presidential recall vote in the country's history. About 92% of them voted "*Que siga*", that is, for Andrés Manuel López Obrador (AMLO) to continue his mandate until 2024, the full term for which he was elected in the summer of 2018. This was an unusual event not only for Mexico, but almost for any presidential democracy: currently only three other countries with that system of government have rules allowing it, and it had only been previously activated in two.<sup>1</sup> Making the episode even more peculiar, the recall vote was not demanded by the president's political opponents—most of whom called voters to boycott it—but primarily by members of his party (MORENA-left)<sup>2</sup> and his sympathizers. Yet, in spite of their apparent enthusiasm, MORENA legislators and their allies in Congress provided only half of the funding that the National Electoral Institute had requested to finance the recall vote. With a reduced number of polling places and turnout well below the mark of 40% that would have made the results binding, the president and his allies accused the Electoral Institute of attempting to sabotage the whole participatory exercise (El Universal.)

These events aptly encapsulate the main tensions that have characterized Mexican politics since 2018, when AMLO came to power: a popular president that is constantly seeking ways to receive unmediated support from the public, an institutional framework that has struggled to accommodate his plebiscitarian impulses, and a citizenry that appears to be generally sympathetic towards the president's stated goals of ending corruption and improving the living conditions of the poor, but has reacted lukewarmly to his attempts to antagonize or weaken other powers.

Against the backdrop of these relatively novel tensions, which can be situated at the level of the regime, longer lasting trends that can be traced back to 2006,

<sup>1</sup> Venezuela and Bolivia celebrated presidential recall referendums in 2004 and 2008, respectively (Eberhardt 2016). Ecuador's constitution also contemplates the provision, but it has never been activated. For an overview of where recall referendums exist and their history as mechanisms of vertical accountability, see Welp (2018).

<sup>2</sup> The *Movimiento de Regeneración Nacional* was founded in 2012 as a civil association to support AMLO's 2012 presidential campaign. It became a political party in 2014, as a splinter of the *Partido de la Revolución Democrática* (PRD).

when the administration of Felipe Calderón Hinojosa (PAN-right)<sup>3</sup> started an all-out war against organized crime, continued to consolidate during 2022: while some indicators of violence seem to have marginally decreased this year, they remain at historically high levels. The homicide rate was 24.5 per 100,000 inhabitants, roughly four times that of the US for the same year and three times larger than Mexico's historic low of 8.1, registered in 2007. Nine of the ten most violent cities in the world in 2022 were located in Mexico, and the number of *desaparecidos*, or missing persons, reached an all-time high of 109,0516 people by the end of the year. According to the United Nations High Commissioner's office for human rights, only 35 recorded disappearances have led to the conviction of the perpetrators. No sector of Mexican society has been spared from this crisis, as evidenced by the degree to which actors critical to democracy have also been victimized by it: seventeen journalists were killed in Mexico in 2022, making it the deadliest country for journalists that year. Similarly, human rights organizations located in Mexico documented the killing of 72 activists, most of them involved in the defense of indigenous communities, land rights, and the environment.<sup>4</sup>

These colossal levels of impunity signal a deeper problem, as the Mexican state seems to have lost its ability to enforce order and guarantee basic protections to life and property in portions of its territory. Ever since this crisis started in 2006, both right-wing and left-wing administrations have heavily relied on the military to try to address the problems of public security, under the rationale that only the armed forces have the training, discipline, and integrity to face the formidable threat posed by organized crime. Sixteen years later, evidence in support of this reasoning is still lacking, but the trend towards militarization has continued unabated. In October 2022, a constitutional reform to extend the presence of the armed forces in public security tasks until 2028 was approved, and the policy areas where the military has direct participation have also increased considerably, including the command and staffing of the National Guard, the construction of large infrastructure projects like the new airport serving Mexico City, and the handling of custom offices throughout the country.

While the empowerment of the military is a trend that precedes the current administration, there are reasons to believe that AMLO's overreliance on the military is qualitatively distinct, and partially responds to a mismatch between his ambitious political goals and the actual power that he has at his disposal

<sup>3</sup> The *Partido Acción Nacional* (PAN) was founded in 1939 to oppose the rising hegemony of the PRI, and it is the historical party of the right in Mexico.

<sup>4</sup> The data on homicides comes from the *Secretaría de Seguridad y Protección Ciudadana* (SSPC). The city comparison comes from a report of the Citizen's Council for Public Security and Criminal Justice (*Consejo Ciudadano para la Seguridad Pública y la Justicia Penal*), a Mexican NGO (Infobae 2023). Their ranking criteria is homicide rate. Data on disappearances is from Mexico's National Registry of Missing Persons (*Registro Nacional de Personas Desaparecidas y No Localizadas*), administered by the Interior Ministry (SEGOB). For journalists and activists, the data is from the NGO *Article 19* and the *Centro Nacional de Comunicación Social* (CENCOS).

to achieve them. The same mismatch is also behind other efforts currently underway to weaken or capture bureaucratic agencies that may limit or pose a threat to those objectives. Thus, the argument that animates this paper is based on the tentative hypothesis that the limited success of plebiscitarian charges against checks and balances, with AMLO and the ruling party constantly bending—though not breaking—critical mechanisms of democratic accountability, is motivating them to seek other strategies of power centralization that are likely contributing to the erosion of state capacity and the deterioration of civilian control of the military. Through a careful examination of crucial events that occurred in Mexico in 2022, in this paper I aim to show that AMLO's aggressive maneuvers against independent bureaucratic actors and his almost blind reliance on the armed forces is partially explained by the resilience of institutional constraints on his power. Ironically, it is likely that Mexico's future will be marked much more deeply by the legacies of the erosion of state authority and militarization than by the threats to democratic rule that this administration has brought about.

The paper proceeds as follows: in the next section, I analyze two episodes where the president and the ruling party directly attacked horizontal checks on their power and explore some of their consequences. The analysis suggests that, while worrisome, this strategy has had only limited success. Section III analyzes instances where AMLO has used his authority over the bureaucracy and the military as a means to overcome the limits of his legislative coalition, actions that are representative of a broader pattern to centralize power in the hands of the president via the undermining of autonomous agencies and the empowering of the armed forces. This particular mode of strengthening the presidency, however, has come at the cost of institutional capabilities of the Mexican state. Section IV analyzes expert commentary and commonly used comparative indicators to argue that observers of Mexican politics may be overestimating the threat of democratic backsliding, while underestimating state capacity erosion. Finally, section V offers some concluding remarks.

## II. THE LIMITS OF BELLIGERENT PLEBISCITARIANISM

The recall vote episode described at the start of the previous section is one among several recent instances in which the president and the ruling party have flexed their plebiscitarian muscle, attempting to equate their political positions with those of “the people” and, in so doing, delegitimize those of actors that may oppose them, including electoral adversaries and institutional actors, such as courts or independent agencies. Two other prominent examples occurred in 2022, both of them after failed attempts to introduce constitutional reforms in Congress: first, a project to overhaul the legal framework of energy production and distribution in Mexico, and, second, an ambitious electoral reform that would have significantly changed the electoral system in the country. In both cases, both the president and members of his party engaged in acts

of harassment and intimidation of individual members of the legislature and the judiciary in an attempt to cower support for the reforms and stifle opposition to their legislative initiatives. These instances are reminiscent of other recent episodes in the region where populist leaders and their political parties have attempted to use the power of the office to erode horizontal constraints on it (Mazzuca 2013), but thus far this strategy has had only limited success in effectively thwarting the strength and independence of actors that have been targeted by it.

The proposed constitutional reform on energy had the goal of overturning some of the changes introduced in this sector during the administration of Enrique Peña Nieto (PRI-center right, 2012-2018),<sup>5</sup> which opened up parts of the energy production chain to private and foreign investment. As a prominent member of the political opposition at the time, AMLO vigorously fought against those changes when they were introduced in 2013, and later in the 2018 campaign trail vowed to overturn them if he was elected president. A first step in this direction occurred with the approval of a new Electric Industry Law in March of 2021, which gave preferential treatment to state-owned companies in the sector, at the expense of private actors.<sup>6</sup> The constitutional reform initiative was considerably more ambitious, aiming to disappear the main regulatory bodies of the sector and place the Energy Ministry at its helm, with state-owned companies PEMEX and CFE dominating the production chain.<sup>7</sup>

In the days leading up to the vote on the constitutional reform in the Chamber of Deputies, the Supreme Court picked up an unconstitutionality action that had been promoted by the Senate against the Electric Industry Law approved in 2021. The president publicly admonished the judges not to declare the law unconstitutional and warned them that doing so would show that they were “*abogados patronales*” or business lawyers, rather than protectors of the public interest. While there is ample evidence that previous presidents also attempted to influence Supreme Court votes, this type of open pressure from the executive on the highest court was a first since the country transitioned to democracy in the late 1990s. The vote in the Court resulted in a peculiar outcome: 7 out of 11 judges deemed the law to be unconstitutional, but the Mexican Constitution establishes a supermajority requirement of 8 votes in order for a law to be struck

<sup>5</sup> The *Partido Revolucionario Institucional* (PRI) was founded in 1929 and was the basis of the authoritarian regime that ruled Mexico during most of the 20th century. After losing power in 2000, it won the presidential election of 2012 and was in office for one more *sexenio* (or six-year period).

<sup>6</sup> Several of the firms that would be affected quickly challenged the law in the courts and a group of senators sponsored an unconstitutionality action before the Supreme Court. See Ibarra-Choul and Sieff (2023)

<sup>7</sup> The details of the changes introduced by the constitutional reform of 2013, the new law of 2021, and the failed constitutional reform of 2022 are complex and escape the scope of this paper. A good overview of the 2013 changes can be found in Wood (2018). Ibarra-Choul and Sieff (2023) wrote for the Washington Post a well-rounded analysis of events leading to the constitutional reform vote on April, 2022.

down. Thus, in spite of a majority of judges objecting to its constitutionality, the law prevailed.<sup>8</sup>

The constitutional reform proposal was finally voted on in the Chamber of Deputies in mid-April, failing to receive two thirds of the votes in the Chamber of Deputies, which is the threshold required to approve constitutional reforms. The vote followed close party lines, with representatives from the parties of the current governing coalition (MORENA, PT, and PVEM)<sup>9</sup> voting in favor, and all others (PAN, PRI, PRD, MC)<sup>10</sup> voting against it. In the immediate aftermath of the vote, the President called it an act of “high-treason.” This started off a massive campaign, orchestrated by MORENA, to individually designate representatives who voted against the reform as “Traidores a la Patria” (*Traitors to the Motherland*). Photos of congressmen featuring this legend were plastered in major cities throughout the country, and MORENA’s leadership publicly delivered to the Attorney General’s office a formal accusation of high crimes against the legislators that opposed the reform. In turn, some of the targeted representatives brought a complaint before the Electoral Tribunal, for alleged violations to electoral law by this campaign. The court ruled against two high-ranking members of MORENA and the party itself, all of whom had to pay symbolic monetary fines (Expansión 2022), bringing this acrimonious saga to an end.

A second instance where these dynamics were at play was the attempt to overhaul the electoral system through another constitutional reform sent by the President to Congress in late April 2022. If approved, the legislative initiative would have transformed the electoral system in Mexico, doing away with the mixed member proportional system that has existed since the 1980s and replace it with a pure proportional system, with each state working as a multi-member district. But the most important change had little to do with the electoral system and was centered on the disappearance of the National Electoral Institute and the Electoral Tribunal, which were the cornerstone of Mexico’s transition to democracy in the 1990s.<sup>11</sup> The proposed constitutional reform would substitute them with new bodies whose leadership would be popularly elected. Additionally, electoral law would be unified throughout the country—instead of

<sup>8</sup> Ironically, it seems like this opened the gate to more litigation, as the constitutionality of the law was not firmly settled by the Supreme Court decision, and several actors affected by it continued to seek the protection of lower courts.

<sup>9</sup> The *Partido del Trabajo* (PT) and the *Partido Verde Ecologista de México* (PVEM) are the junior partners in this coalition. The former is a relatively long lived, programmatically-oriented party of the left, while the latter is an opportunistic clientelistic party.

<sup>10</sup> The *Partido de la Revolución Democrática* (PRD) is a center-left party founded in 1989 by Cuauhtémoc Cárdenas, son of the mythic president of the 1930s, Lázaro Cárdenas, and several other members of the PRI who left the party denouncing its ideological shift after embracing market reforms and economic liberalization in the early 1980s. *Movimiento Ciudadano* (MC) is a center-left, self-proclaimed social democratic party founded in 1999.

<sup>11</sup> The creation of an independent electoral commission was key for ending the uneven playing field that characterized elections during the long reign of the PRI during the 20<sup>th</sup> century. See Eisendstadt (2003), Greene (2003), Magaloni (2006). AMLO has held a grudge against INE and the electoral court since the controversial election of 2006, when he lost the presidency against Felipe Calderón by a 0.6% margin, or a mere 200,000 votes.

having 32 independent electoral regimes—and there would be a single national authority in charge of organizing elections in all the territory.

Several actors involved in the creation of these electoral institutions in the 1990s, many of whom are academics, public intellectuals, and social activists, publicly voiced their opposition to the proposed reforms, arguing that they would do away with the safeguards of political neutrality that have characterized Mexico's current electoral framework since its inception. Some of these actors publicly called the citizenry to mobilize in defense of these institutions, a call that was also heeded by opposition parties. On November 13, 2022, a large number of people marched through Mexico City's *Paseo de la Reforma* and then gathered at the *Monumento a la Revolución*, where José Woldenberg, a professor at the National University who served as the first president of the Electoral Institute from 1996 to 2003, delivered the main speech.

These expressions of discontent were met, once again, with a virulent reaction from the presidential palace: in a press conference the day after the protest, AMLO declared that those who attended did not actually care about defending electoral institutions, but were rather opponents of his project of national transformation, and accused them of defending "corruption, racism, classism, and discrimination." The president also called for a counterprotest to defend *La Cuarta Transformación*, or "The Fourth Transformation" as he has dubbed his political project.<sup>12</sup> Two weeks later, the "March of the People," as AMLO himself called it, filled Mexico City's main plaza (the *Zócalo*), allowing AMLO to counter the mobilization in defense of electoral institutions with a show of force of his own.

The constitutional reform proposal was voted in early December of 2022 and, as it happened with the energy initiative, the ruling coalition failed to get enough votes for it to pass. In the Chamber of Deputies, where it was originally presented, the measure received 269 votes in favor, 65 votes short of the two thirds threshold, in a vote that once again followed closely party lines. This time, however, the Executive had prepared a "B" plan: a legislative initiative that left aside the changes to the electoral system that were central to the constitutional reform and focused instead on the gutting of the Electoral Institute's administrative core. The reform was presented under the guise of austerity measures and was based exclusively on ordinary legislation, without proposing any constitutional changes. Several experts pointed out that, if fully implemented, the law could gravely affect the ability of the National Electoral Institute to organize the electoral process.<sup>13</sup> Also important is the fact that this is the first time since Mexico transitioned to democracy in the 1990s that a change to electoral legislation was approved without the consensus of all major political parties. The law was submitted to the Chamber of Deputies the day after

<sup>12</sup> The Fourth Transformation is supposed to be the fourth major political change in Mexican history, after Independence (1810), the Reform Laws (1860), and the Revolution (1910).

<sup>13</sup> The best analysis of the reform published to date is the edited volume by Marván-Laborde and Reyes (2023)

the constitutional reform was rejected and the parties of the ruling coalition approved a measure to dispense all parliamentary procedures and hold a direct vote. The law was approved by both chambers of Congress, but its enforcement was temporally stayed, awaiting a ruling from the Supreme Court. On May 8th 2023, the Supreme Court struck down the law due to violations to the legislative process.

Altogether, these two episodes underscore at least two ways in which the president and the ruling party engaged in actions that are incompatible with separation of powers principles: first, the pressure to exert undue influence on a Supreme Court decision and, second, the slander and harassment of members of Congress who were in the process of discussing a legislative initiative sent by the Executive. The attacks on civil society by the President also seem at odds with basic democratic principles, given their potential to undermine civic participation and to foment hostility towards actors that are critical of the government. Less clear as to its actual incompatibility with these principles was the willingness of the ruling coalition to dispense parliamentary procedures in order to “fast-track” a presidential legislative initiative, but at the very least it is an action that seems to be in tension with them.

As grave and ominous as these actions were, however, it is noteworthy that both the legislative and judicial outcomes were not those that the president desired: both constitutional reforms were defeated in Congress, a majority of judges in the Supreme Court sided with the opinion that the Electric Industry Law approved in 2021 is, in fact, unconstitutional, even if the law was not struck down, and it is still to be seen whether or not the greatly diminished electoral reform survives judicial review. Not only did these outcomes effectively limit the ambitious political and policy goals of the AMLO administration, but they also suggest that institutional constraints on executive power are working effectively. Finally, there is also evidence that the attempts to portray members of the opposition as *traidores de la patria* were not well received by the public: a poll taken to gauge public opinion in this regard showed that only 33% of respondents supported the label, while 60% rejected it (Moreno 2022.)

This, of course, does not necessarily mean that democratic backsliding has been altogether avoided. The latter is a process that unfolds over time, and there is no doubt that the episodes described in this section constitute serious efforts to thwart formal checks on the power of the president, but it is significant that they have thus far proven to have only limited success, indicating that the scale of backsliding appears to be contained for now. Importantly, as it will be shown in the next section, the very resilience of horizontal checks on presidential power seems to be motivating other power centralizing strategies that are cause of concern, but for different reasons.



### III. THE HOLLOWING OUT OF THE STATE AND ITS MILITARIZATION

The way in which the Executive dealt with its latest legislative defeat (the constitutional electoral reform), attempting to bring narrower, yet still consequential changes is representative of a broader pattern. When he came to power in 2018, AMLO had an incredibly ambitious agenda, but he has found his ability to deliver on it significantly constrained by a myriad of formal and informal actors. Determined to move his agenda forward, but lacking sufficient legislative support and unable to exert control over the judiciary, AMLO has sought other ways to achieve his goals. The means that he has found are fundamentally three: more modest legislative changes, the use of budgetary measures and appointments to weaken or more effectively control independent bureaucratic agencies,<sup>14</sup> and an overreliance on the military.

The “B” plan to reform the electoral law, which was earlier discussed, is particularly significant because, even though it was more modest than the constitutional reforms sought by the Executive, the proposed legislation seemed to purposefully go beyond constitutional limits in the hopes that it would be difficult for the Supreme Court to muster the supermajority needed to strike it down, especially considering that four out of eleven of its judges were appointed by the current President. But beyond its constitutionality problems, there is another troublesome aspect of this legislation, which is representative of a pattern that has become common during AMLO’s administration: it deprives the Electoral Institute of crucial resources to perform its tasks. An analysis performed by INE itself indicates that the reform would cut approximately one third its monetary and human resources, and the law would force it to close a large number of its field offices (Secretaría Ejecutiva 2023.)

While the changes to INE are concerning due to their potential effects on keeping a level electoral playing field, they are even more worrisome because of their effects on state capacity. To understand this, it is important to situate this agency in the broader context of institutional building in Mexico in the last thirty years. Starting in the early 1990s, with a series of legal reforms that granted full autonomy to the central bank, a new “model” of institutional design emerged in Mexico with the creation of a number of bureaucratic agencies devised to conduct technically complex tasks such as collecting statistical information, enforcing government transparency legislation, regulating markets, investigating human rights abuses, measuring poverty, organizing and managing elections, among others. Known as “Constitutionally Autonomous

<sup>14</sup> Some efforts to control or disband independent agencies predate the legislative setbacks and judicial rulings that have thwarted AMLO’s political agenda. Examples of this are the reform that disappeared the National Institute for Educational Evaluation (INEE), or the appointment of Rosario Piedra Ibarra, a close presidential ally, at the helm of the National Commission for Human Rights (CNDH). However, as the examples analyzed here indicate, this is a strategy that has become much more prevalent during the second half of AMLO’s presidency, after his party’s position in Congress significantly deteriorated, making important legislative changes increasingly unlikely.

Organizations” (OCAs, for their acronym in Spanish), they share the common characteristics of political neutrality, administrative autonomy, and collegiate mechanisms of decision-making (Ballinas-Valdes 2011, Ruiz 2017.) Several legal safeguards protect these features, including appointing procedures that require certification of credentials and congressional approval.<sup>15</sup>

The assault on INE was particularly severe, but it was by no means an isolated case. These autonomous agencies have been a prime target of AMLO’s populist discourse, as he has argued that they constitute a “golden bureaucracy” (*burocracia dorada*), a reference to the better salaries and working conditions that they enjoy compared to other public sector agencies, and that they were created either for pretense, or to defend private interests. From the start of his presidency, AMLO’s stated goal has been their disappearance and to have several ministries absorb their functions, something that his congressional coalition has not been able to deliver on. Therefore, an alternative way in which AMLO has successfully weakened these agencies, has been to make them targets of austerity measures<sup>16</sup> and to delay or suspend appointments to their governance bodies, which in some cases has paralyzed their decision-making procedures. Towards the end of 2022, six of these agencies had pending appointments to leadership positions, with the situation becoming particularly precarious for the anti-trust Commission (COFECE), the Public Information Access Institute (INAI), and the Telecommunications Institute (IFETEL), all of which faced the possibility of their decisions not being legally binding because of a shortage of board/council members.

On February 2022, during a press conference where he was asked about delayed appointments to the boards/councils of these agencies, AMLO declared: “...we are working on it... but the truth is that these agencies should disappear. In the case of COFECE and IFETEL, these are structures that were created to enable privatization and the pillaging of national goods. The problem is that I will not have enough time to do away with them, and I have to work with conservative parties in Congress that do not want to approve a thing...” (Reforma) This was a rare admission that the delayed appointments were a deliberate response to the difficulties that he has faced when trying to pass legislation to disband these autonomous bureaucratic agencies. The leadership of COFECE, INAI, and IFETEL have sought assistance from the judiciary in order to force the president and Congress to move forward with the appointment process,

<sup>15</sup> Petersen and Somuano (2021) argue that the tensions of the AMLO administration with INE and INAI are evidence of the expansion of informal presidential powers and the erosion of checks and balances in Mexico. While I agree with their assessment that the conflict between AMLO and several OCA’s are part of ongoing power centralizing efforts, I do not think it is conceptually appropriate to think of these organizations as part of the system of checks and balances of a presidential democracy.

<sup>16</sup> Governmental austerity measures were a campaign promise of AMLO that have been widely implemented throughout the public sector. They have included salary reductions, hire freezes, reduction of non-essential expenses, and the firing of around 400,000 public employees (Dussauge and Aguilar 2021). I focus here specifically on OCAs not only because of their outsized importance to critical tasks of the Mexican state, but also because they have been singled out by AMLO as particularly nefarious elements of it, and have therefore been subject to very specific maneuvers to weaken their independence.

thus far with mixed results. Whether or not the judiciary orders the Executive and Congress to complete the appointment process, some of the damage may be already done, as the austerity measures and lack of leadership have already caused resignations in several of these agencies, created uncertainty among the actors that are subject to their regulations, and weakened their ability to discipline powerful actors, both in the public and private realms.

Finally, we come to the third strategy that AMLO has employed to move his agenda forward, and which constitutes one of the most concerning developments during his administration: the reliance on the military not only to assist in public security matters, but on a broad range of issues, ranging from building infrastructure projects to administering custom offices throughout the country.<sup>17</sup> The trend towards militarization certainly precedes AMLO, and started at least since 2006, when then president Felipe Calderón ordered the military to confront criminal organizations and help state and municipal law enforcement agencies with patrolling and surveillance duties. Yet, in spite of the fact that one of AMLO's campaign promises was to send the soldiers back to the barracks, once he assumed power he doubled down on the militarization strategy, not only pushing for legal reforms to regularize their participation in these activities, but also delegating on them a number of civilian responsibilities. Of particular note have been two of his insignia projects: Mexico City's new airport, which was inaugurated on March 2022, and the *Tren Maya*, a controversial touristic rail transportation system that will cut across the rainforest to connect several cities of Mexico's south-east. Not only is the military in charge of the construction of these projects, but it will also be in charge of operating them through a new state-owned enterprise under their control. Leaked internal documents from the Secretary of Defense, which came to light in October of 2022 show that there are also plans for the military to run a new airline.

Illustrative of how this strategy responds to AMLO's position of political weakness is the justification that he has provided for having the armed forces play this role. Shortly after the plans for the military-run airline were revealed, he defended the idea, arguing that it had to be done that way "...to make sure it will be in good custody, because it will make it harder for them (political rivals) if they come back, god forbid, because it is not the same to try to privatize it if it is in the hands of the Communications Ministry than if it is in the hands of the Defense Ministry..." (Latinus.) A couple of months later, in one of his daily press conferences, he offered a similar rationale for having the *Tren Maya* also administered by SEDENA, suggesting that if the Ministry of Tourism were in charge instead, there would be corruption involved and the project could end up in private hands (Aristegui Noticias.) These candid revelations

<sup>17</sup> The empowerment of the military is an issue that naturally can have important implications for democratic erosion in the future. While this is a legitimate concern in its own right, here I wish to call attention to the fact that the use of the military to sidestep the bureaucratic apparatus undermines state capabilities. See Flores Macías (2018) for evidence of the deleterious effects of militarization of anti-drug efforts on the capacity to provide public order and fiscal extraction.

illustrate well why placing the military in charge of these projects constitute a challenge for state capacity, as the bypassing and circumventing of already existing bureaucratic structures fundamentally weakens them, both politically and administratively.

The same trove of leaked documents showed that it is likely that the military has been spying on journalists, human rights activists, and political candidates through an intelligence center of its own, which is not under civilian control or supervision. AMLO's reaction to these revelations shows that the symbiotic relationship that he has developed with the military has crossed an ominous threshold: he denied the allegations and instead accused the news outlets that found the information of being paid by his political opponents to damage his government (*Animal Político*.) A final piece of information that seems to confirm this conclusion comes from the course that the investigation into the disappearance of 43 students in Ayotzinapa, Guerrero, took towards the end of last year. Solving this horrific case, which shook the country in 2014, and bringing the perpetrators to justice, was another one of AMLO's campaign promises. A special prosecutor was appointed and an investigative commission was created in 2018, and an international committee of experts, created originally in 2014 by the Inter-American Commission on Human rights,<sup>18</sup> was reactivated in 2020 (OAS). Yet, after the prosecution issued arrest warrants against eighty people in September 2022, including more than twenty members of the military, AMLO publicly opposed this decision, saying that the evidence pointed to the involvement of no more than five members of the military, and that the move by the prosecution was an attempt to cause an army rebellion. The investigation is currently in an impasse following the resignation of the special prosecutor and the freezing of the arrest warrants. The latest reports issued by the GIEI (CIDH 2022) indicate that the armed forces are still not fully cooperating. This extraordinary turn of events can only be understood in the context of AMLO's relative political weakness and his newfound strategy to rely on the military to advance his political project.

#### IV. ASSESSING BACKSLIDING AND STATE CAPACITY EROSION

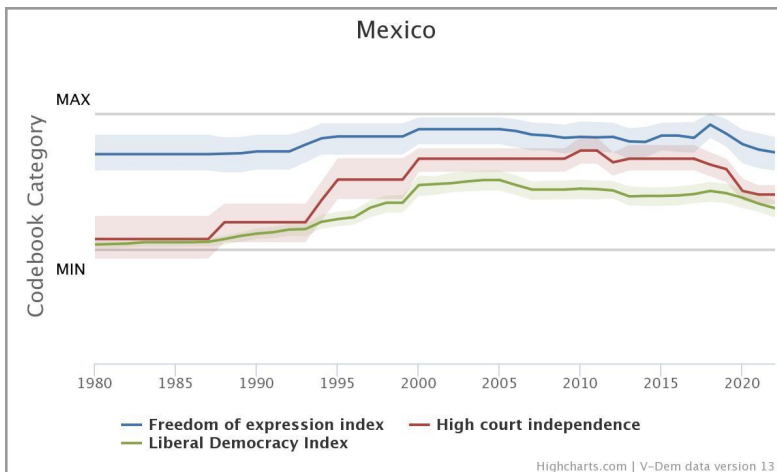
Several analysts have warned about democratic backsliding occurring in Mexico since AMLO took power, and some have even gone farther to argue that authoritarian restoration has perhaps already taken place. The President's constant verbal attacks on the press, his open hostility towards independent agencies and courts, and the not infrequent slandering of members of civil society critical of his government, have set off the "autocratization" alarms among a number of experts. Examples of particularly stark assessments are those offered by Petersen and Somuano (2021), Aguilar-Rivera (2022), Merino (2021), and

<sup>18</sup> Known as the *Grupo Interdisciplinario de Expertos Independientes* (GIEI), the committee included criminal law experts and human rights advocates from Colombia, Guatemala, Chile, and Spain.

López-Guerra (2023), all of which concur that a process of democratic reversion is taking place in Mexico.<sup>19</sup>

This assessment seems to be at least partially shared by a broader number of independent observers, as represented by changes registered in commonly used measures of democracy. Figure 1, for example, shows the evolution of three different indicators of democracy and democratic quality taken from the V-Dem project, which are based on expert evaluations: freedom of expression, high-court independence, and liberal democracy.<sup>20</sup> I specifically selected measures that would reflect changes typically associated with democratic backsliding, like the erosion of checks on executive power or challenges to electoral integrity (Bermeo 2016), and which can be meaningfully connected to the events analyzed in section two of this article. It is quite remarkable to note that all three measures have registered a significant dip since 2018, after the electoral victory of AMLO and MORENA in July of that year.<sup>21</sup> The figure plots values going back to 1980, when the long-standing hegemonic-party authoritarian regime started to open up. Most students of Mexican politics situate the “turning-point” of Mexico’s transition in 1997, the first year when elections were organized by a fully independent electoral commission and, incidentally, the year when the PRI lost the absolute majority in Congress for the first time since its foundation in 1929. The question that the changes registered in these indicators rise is whether their magnitude is justified in light of recent events in Mexico.

Figure 1. Indicators of Democratic Governance



<sup>19</sup> A more optimistic evaluation with some similarities to the one that I offer here can be found in Sánchez-Talanquer and Greene (2021). Whereas the latter authors argue that low state capacity might prevent further autocratization, I suggest the inverse relationship: democratic resilience is motivating AMLO’s efforts to weaken bureaucratic autonomy and his overreliance on the military.

<sup>20</sup> See Marquardt (2022) for a description of the V-Dem project’s methodology.

<sup>21</sup> Similarly, Freedom House recorded a significant decrease in Mexico’s freedom index score, going down from 65 to 60 during AMLO’s tenure, with its Civil Liberties rating going back to pre-2000 levels.

There is no question that the arrival of AMLO and MORENA to power has brought new challenges to Mexican democracy, but there is reason to be skeptical of estimates that would lead us to believe that it has eroded to pre-1997 levels. The freedom of expression index, measuring the extent to which governments respect press and media freedom, appropriately illustrates this point: the indicator indicates that conditions in Mexico in this regard are similar to those present in 1987, when the PRI still held strong media controls and there was only one major TV company, closely associated with the regime. The indicator on high court independence, which evaluates the degree to which the highest court makes decisions autonomously or following the dictates of the Executive, is now lower than at any point since 1994, and the liberal democracy index, a composite measure that is meant to capture both electoral and liberal aspects of democracy, currently sits at the same level as it was in 1997, the year the PRI lost its Congressional majority for the first time in more than sixty years. While the events analyzed in this paper are temporally circumscribed and are limited in number, it is hard to find others that would constitute enough evidence to consider that the country has experienced such a dramatic shift.

An alternative way to assess the significance of backsliding in Mexico is through a comparison of the case with others where the literature has identified the occurrence of significant democratic setbacks. In her pioneering analysis of democratic backsliding, Bermeo (2016) identifies three varieties that have registered an increased prevalence in recent times: promissory coups, executive aggrandizement, and strategic manipulation of elections. The first category, which refers to a coup d'état brought about "in the name of democracy," is not applicable to the Mexican case, but, given recent events, it is reasonable to consider the extent to which the other two have been part of recent regime dynamics. Aggrandizement refers to instances where "...elected executives weaken checks on executive power one by one, undertaking a series of institutional changes that hamper the power of opposition forces to challenge executive preferences..." (Bermeo 2016, 10.) This definition is not entirely unambiguous, but the reference to institutional changes offers a relatively straightforward criteria for including or excluding cases. The examples of executive aggrandizement that she provides come from Turkey under Tayyip Erdoğan, and Ecuador under Rafael Correa, cases where the parties supporting these rulers were able to pass legislation that significantly curtailed media freedoms and judicial autonomy. Journalists critical of the government were prosecuted and convicted (Amnesty International 2011; 2017), and, in the case of Turkey, content deemed politically controversial was censored in radio, TV, and the internet. In both countries there was an overhaul of the judiciary, allowing Erdogan to appoint 14 of 17 Constitutional Court judges, and Correa to remove a large number of regular and constitutional judges (Human Rights Watch 2018.) In the Mexican case, no legislative change of this sort has occurred, and the gravest incident of judicial interference seems to have been the case of the resignation of a Supreme Court judge, who resigned to his position after it was revealed that there was an open investigation against him.

Strategic manipulation of elections “...include hampering media access, using government funds for incumbent campaigns, keeping opposition candidates off the ballot, hampering voter registration, packing electoral commissions, changing electoral rules to favor incumbents, and harassing opponents—but all done in such a way that the elections themselves do not appear fraudulent...” (Bermeo 2016, 13). Labeled elsewhere as electoral or competitive authoritarianism (Levitsky and Way 2010; Schedler 2013), this variant of backsliding also requires a significant institutional overhaul, changing campaign finance, voting rights, and media access laws, and the ability to appoint partisans in electoral commissions. While the electoral reform passed in 2022 in Mexico is concerning in this regard because it weakens the National Electoral Institute, the legislation would certainly affect its logistical and administrative capacities, but it would leave the thrust of norms and procedures designed to ensure electoral integrity largely intact. Also, it would not entail any change to its leadership or to its decision-making mechanisms.

Perhaps one factor that has skewed perceptions of democratic backsliding in Mexico has been the changes that the party-system experienced in the aftermath of the 2018 election. Several studies of earlier episodes of democratic erosion in the Latin American region have pointed to the collapse of the party system as a major contributing factor (Mazzuca 2013; Corrales and Penfold-Becerra 2015; Mainwaring 2018.) The party system that emerged after the transition to democracy in Mexico in 1997 was characterized by the presence of three large parties (PRD-center left, PRI-center, and PAN-right), and a few additional “satellite” parties at both sides of the ideological spectrum. In 2018, a veritable “tsunami” of MORENA votes displaced these parties and reconfigured the nature of political competition, substituting the tripolar system of the Mexican transition, with a highly asymmetrical bipolar one. The current ruling party and the smaller PVEM and PT at one pole, and the rest of the parties on the opposite side. To some extent, AMLO’s populist pulsion and the hegemonic pretensions of MORENA have realigned the cleavage structure of the system from one based on the traditional left-right spectrum, to one based on a populist/anti-populist one. These changes are also visible in the rapid takeover of governorships by MORENA, which now controls the executive office in 21 of 32 Mexican states (see Figure 2.) This is particularly impressive, considering that the party’s electoral debut occurred very recently, in the intermediate federal election of 2015.

While the changes experienced by the party system since 2018 in Mexico are profound, it is hard to argue that they amount to its collapse. Following the criteria proposed by Morgan (2011), which requires that there be both decay of traditional major parties and a change in the effective number of parties represented in the legislature,<sup>22</sup> the Mexican case does not seem to be a good

<sup>22</sup> The effective number of parties is a weighted count of the parties that have representation in the legislature originally developed by Laakso and Taagepera (1979)

Figure 2. Mexican states by party controlling the Governor's office



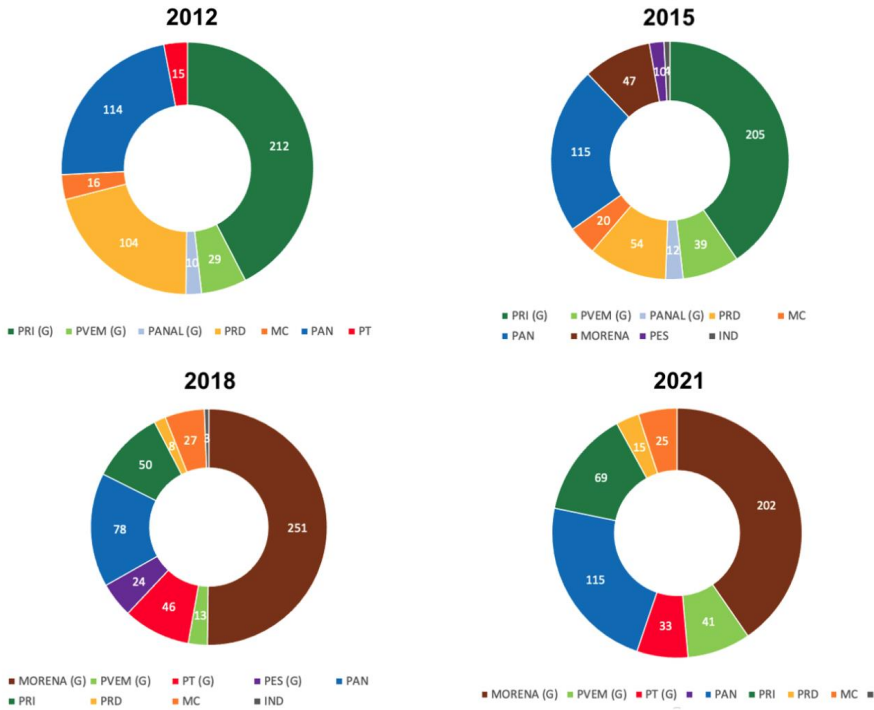
Source: Author with data from Instituto Nacional Electoral

fit. The traditional parties are diminished, but continue to be political forces of significant weight in Congress. Figure 3 shows the political composition of the lower house of the Mexican Congress after the last four federal elections. In addition to the rise of MORENA, two other significant changes stand out: first, the virtual extinction of the PRD, the strongest center-left party from 1997 to the 2018 election. Second, the significant weakening of the PRI, which went from commanding the governing coalition from 2012-2018 to the relatively modest position of third political force in Congress, after MORENA and PAN. An important element of continuity, however, is the persistent strength of the latter as the strongest opposition force both under PRI and MORENA governments. The effective number of parties represented in the legislature has remained relatively stable, hovering around the three and a half mark: 3.56 in 2012, 4.08 in 2015, 3.22 in 2018, and 4.00 in 2021.

In their study on the causes of democratic backsliding, Haggard and Kaufman suggest that a critical factor is the weakening of the legislature, which usually occurs after the party that is threatening democratic norms achieves a large legislative majority, allowing it to make institutional changes that significantly impinge on fundamental rights and tilt the electoral playing field in their favor. The data analyzed to understand the changes to the party system also provides a relatively comforting note for the Mexican case, as MORENA failed to consolidate a strong legislative majority in the intermediate elections of 2021 and its position in Congress looks somewhat similar to the one enjoyed by governing parties in the past. This is, of course, the main factor behind the recent legislative defeats of AMLO's initiatives in Congress, a major sign of the strength of horizontal checks on his power.



Figure 3. Party Composition of the Lower House 2012 – 2021\*



Source: Author with data from Instituto Nacional Electoral.  
 \*The G in parenthesis denotes that the party is part of the governing coalition.

In light of this evidence, it is difficult not to conclude that the extent of democratic backsliding currently occurring in Mexico seems to have been overestimated both by Mexican analysts and independent observers. As mentioned before, this is an ongoing process, and it is not unconceivable that the situation could take a turn for the worse if, for example, MORENA were to obtain a resounding victory in the 2024 elections and tried to bring about significant constitutional changes.<sup>23</sup> But the fact of the matter is that, up until now, elections continue to be organized and sanctioned by independent bodies that are capable of ensuring that they remain free and fair, whereas civil society, media, opposition parties, and the judiciary all remain robust actors that have effectively checked the power of the president.

In contrast, experts’ perceptions of state capacity and militarization have barely registered any changes. While this analysis is not visually presented here, the picture that emerges from looking at measures from both the V-Dem project

<sup>23</sup> AMLO has publicly announced that he will attempt to do so before leaving office and just after a new Congress is inaugurated in September of 2024, in the expectation that his party will be able to obtain a two thirds majority of seats.

and the World Bank's World Governance Indicators (WGI) shows as much<sup>24</sup>: only one out of nine indicators showed a marked decline since 2018 (regulatory quality) while other three experienced improvements (executive corruption and electoral management body autonomy and capacity). The rest show no significant movement in either direction. All of this in spite of the significant inroads made by MORENA and AMLO to colonize the bureaucratic apparatus and the increasing role that the armed forces are playing both in new administrative roles and as a political actor, which would suggest that these are drastic and more profound changes.<sup>25</sup>

The point of calling attention to these discrepancies is to argue for a shift in analytical focus that can help us further scrutinize the challenges to state capacity brought about by AMLO and MORENA<sup>26</sup> and explore other avenues to test the tentative hypothesis that animates this paper, namely that it is the resilience of democratic checks and balances which has pushed them to new power centralizing strategies that are significantly eroding it.<sup>27</sup>

## V. CONCLUDING REMARKS

During 2022, critical components of democratic governance in Mexico showed remarkable resilience in the face of continued attempts from the Executive to concentrate power and erode mechanisms of horizontal accountability. Two particularly ambitious constitutional reforms initiated by the current President, which would have expanded his policy making powers and significantly compromise the integrity of elections, were swiftly defeated in Congress. The Judiciary also proved to retain independence from the Executive, and continued to issue rulings that are at odds with the preferences of the latter. Civil society actors showed vibrancy and robustness, particularly as they vigorously opposed, through large scale mobilizations, the attempts by the ruling coalition to alter the electoral playing field. A more modest electoral reform, with the potential of affecting the logistical ability of the National Electoral Institute to properly organize elections was approved by MORENA and their allies in Congress. While concerning, the reform would not affect the governance structure

<sup>24</sup> The indicators from the V-Dem project are: criteria for appointment decisions in the state administration, autonomy and capacity of the electoral management body, neopatrimonial rule index, executive corruption index, and military dimension index. The indicators from the WGI are: government effectiveness, regulatory quality, rule of law, and control of corruption.

<sup>25</sup> Interestingly, a few public administration experts have been calling attention to these issues, but they also do so under the light of democratic backsliding, rather than in its own right. See for example Dussauge and Aguilar (2021) and González-Vázquez et al (2023).

<sup>26</sup> The work of Sánchez-Talanquer (2020) is a notable effort in this direction. The author is one of the few who recognized early on the potential consequences of AMLO's power centralizing strategies on Mexico's state capabilities.

<sup>27</sup> Naturally, this hypothesis could also be relevant in other contexts where institutional constraints have effectively limited the power of populist leaders, but exploring it in a comparative context escapes the purposes of this paper.

of the Institute, change its leadership positions, or alter the rules regulating electoral competition in Mexico. This significantly less ambitious reform was extensively challenged in the court system and has been recently struck down by the Supreme Court. This description of events defies common perceptions of extensive democratic backsliding currently occurring in Mexico.

Facing the limits imposed by robust constraints to his power, AMLO has tried to achieve his ambitious political goals through means that do not require the acquiescence or cooperation of other powers, but which have contributed to the erosion of state capabilities and a growing imbalance in civil-military relations. Austerity measures and delayed appointments have weakened the autonomy of bureaucratic agencies that perform critical tasks, while an increased reliance on the military not only for public security, but also for a large range of governmental matters usually in the hands of civilians have placed the armed forces in a position of political influence that they had not occupied since the first decades of the 20<sup>th</sup> century. Both the revelation that they perform intelligence duties on a dubious legal basis, including the espionage of Mexican citizens, without the direction or supervision of civilian authorities, and the difficulties that the justice system has encountered to ensure their cooperation with active criminal investigations reinforce this point. Thus, the very reasons explaining the effective containment of AMLO's plebiscitarian push and MORENA's hegemonic pretensions may be fueling the deterioration of bureaucratic capabilities and the enlarged administrative and political role of the armed forces.

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