

The Mexican Elections

Three Scenarios

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THE CONTEXT

As you probably know, the International Monetary Fund (IMF) warned in September 2011 that the world economy is in a dangerous new phase and lowered its overall growth forecast to 4 percent for emerging markets and 2 percent for advanced economies. Mexico should be in the middle, in other words at 3 percent, still a very weak number for an economy desperately needing job creation. It has been more than 10 years since Mexico has experienced vibrant economic growth, and, besides the social and economic impact of this sad performance, it has also strongly affected the national mood.

According to certain polls, Mexicans do not feel they are on the right path: roughly 65 percent of the population considers that we are not on the right track. Even if this enor-

mous chunk of the population may not have an idea about what the right path might be, the figure is still quite noteworthy and is probably the heaviest burden to carry for the candidate of the ruling party. Emboldened by the small growth rate, the Institutional Revolutionary Party (PRI) is betting on connecting with this social frustration.

In any case, a caveat must be established: economic stability is an asset the National Action Party (PAN) will use to the hilt, probably saying that mediocrity means mediocrity, but in no way does this imply a critical situation like the one that used to exist under PRI administrations. The responsible management of the macro-economic fundamentals is a bonus for the PAN.

In the field of security, according to the polls, we detect a peculiar situation, because President Calderón's strategy

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is supported by a majority, but at the same time, a majority is demanding changes. Obviously a dramatic increase—or decrease—of the murder rate will have a considerable effect on voters’ moods.

It goes without saying that a spectacular success such as the apprehension of drug kingpin “Chapo” Guzmán might have a broad impact on public opinion.

In the international arena, we must consider two main events: first, the Pope’s visit, and then the G-20 summit. Seemingly, they do not have the potential to shift electoral intentions, but clearly they are the two main points on the president’s agenda and he will use them as much as his competitors and the electoral authorities allow.

THE SCENARIOS

We know that the year 2012 will bring a huge contrast on the political playing field; on the one hand, it is going to be particularly boring. Radio and TV audiences will be chastised with an unprecedented number of spots: full speed ahead with more than 42 million spots claiming that parties and candidates know the way to improve the country. We will be forced to swallow their “breathtaking findings” and new proposals. The daily ordeal of slogans and marketing jingles—platitudes—is the toll we have to pay for having competitive elections. As you know, legislation has been passed banning political attacks—called in Mexico “black” campaigns—so communication will be very prudent, cautious...and boring.

On the other hand, however, we will have a very interesting year because of the healthy, democratic uncertainty. Even if in December the pollsters detected that the leading candidate by far was Enrique Peña Nieto, I assume that campaigns will make a difference, and so history has not already been written.

Allow me to share with you, for the sake of simplicity, three scenarios and discuss the probability of each. I will name each case after a local election that took place last year. I would like to stress that the name is just a label; I am not assuming that a local election can predict the result of a national election.

SCENARIO, STATE OF MEXICO:

10-PERCENT CHANCE

In this particular case, the leading party and its candidate are able to preserve their position by keeping all the parameters stable. A soft, light campaign is required to maintain the distance between the leader and the other candidates. This happened on the local level last year, but it is highly probable that in the national arena, parties will struggle to regain a sure footing after this disheartening political failure.

In the state of Mexico, the PRI’s huge victory was possible with the unconscious help of Andrés Manuel López Obrador, who blocked the possibility of a Party of the Democratic Revolution-National Action Party (PRD-PAN) alliance conceived with the sole purpose of beating the ruling party. Two bad candidates did the rest, and Eruviel Ávila, who began his campaign leading the polls by more than 30 points, won, beating the PRD by more than 40 points and PAN by nearly 50, an indisputable victory. The particular morphology of the political system in the state of Mexico and the prevailing civic culture explain this overwhelming hegemony, which, according to the evidence of opinion polls and the results of previous elections (1999 and 2005), cannot be extrapolated to the national level.

The 2011 electoral results were 61.9 percent for Eruviel Ávila (PRI-Green Party of México [PVEM]); 20.9 percent for Alejandro Encinas (PRD-Labor Party [PT]); and 12.2 percent for Luis Felipe Bravo Mena (PAN). The only chance for the PRI to see this scenario unfolding nationwide would be through a combination of political mistakes by the opposition (imposing a weak and unpopular candidate, inept tactics, and fumbled campaigns). And, last but not least, PRI candidate Enrique Peña Nieto will have to wage his campaign by the book and not ad lib.

SCENARIO, VERACRUZ: 50 PERCENT CHANCE

The second scenario could be like the Veracruz elections: 50 percent chance. In that state, at the beginning of the race,

the PRI was also leading in the polls, but the gap between first and second place was not that wide. The governor was not particularly popular and neither was the candidate. The PAN selected a very controversial candidate, Miguel Ángel Yunes, but who was very effective in restoring discipline in the party's electoral structures. And the left-wing parties for the third time nominated the same candidate, a former governor, who was very well known both for good and bad reasons.

The leftist campaign never took off, and made room for the voters who disliked PRI strongman Fidel Herrera's imposing his successor to support the right wing party's less unpopular candidate. To state the obvious: the election became a sort of referendum for independent voters, with a central question: to PRI or not to PRI? We know the story's denouement: the PRI won the election by a small majority and was forced to set up an alliance with a dissident branch of the PAN and to give a lot of power to the oil workers' union and even the teachers' union led by Elba Esther Gordillo (known as "la maestra"), who used to have a close relationship with Yunes.

The 2011 electoral results in the Veracruz elections gave Javier Duarte (PRI) 43.3 percent, Miguel Ángel Yunes (PAN) 40.9 percent, and Dante Delgado (PRD-MC-PT) 12.9 percent. In my view this could be a more likely scenario for this year's national elections. If the PAN is able to send the PRD to the non-competitive area, and manage the elusive possibility of establishing a dual system of choice ("me or the PRI"), the chances of increasing the right-wing candidate's odds will leave us a completely different campaign.

Some might say that the same scenario could be used the other way around, in which the leftist coalition reaches the competitive area and sends the PAN to a distant third, but according to the polls, the potential vote for the PAN is 25 percent, while the PRD's is 18 percent. The key will be the candidates' ability to become a credible and reliable second-best, and, honestly, the PAN's Josefina can do a better job than Andrés Manuel López Obrador in winning the independent vote.

SCENARIO, MICHOACÁN: 40-PERCENT CHANCE

The third scenario is close to the Michoacán election, the last of the local elections before the presidential race: I give it a 40-percent chance. As you certainly know, in Michoacán the ruling party was the PRD, so the burden of daily governance and public safety, which became a big deal in the campaigns, was mainly carried by the leftist party. Yet the PRD remained very popular and managed to keep the allegiance of a considerable chunk of voters despite an uncharismatic candidate.

The PAN, facing the *fait accompli* that the experiment of coalitions against the PRI faded away, was forced to run on its own. The president's sister, Luisa María Calderón, was nominated as candidate and, in addition to the support of her powerful brother, she ran a successful campaign. Her gender was a new component, but apparently that did not make the difference. In the last weeks of the campaign she shot up in the polls like a raising star. In the end, she did not make it, but she sent the PRD to third place.

2011 MICHOACÁN ELECTORAL RESULTS

For Fausto Vallejo (PRI-PVEM), 35.4 percent; Luisa María Calderón (PAN-Panal), 32 percent; and for Silvano Aureoles (PRD-PT-MC), 28 percent. The PRI had a popular candidate, Vallejo, and the ascent of Peña's popularity was tested once again. The PRI won the election by a small margin.

In the Michoacán example, the voters were divided evenly into thirds and it was the campaign that made the difference; so the outcome was radically the opposite of what happened in the state of Mexico. If this were the case nationwide, the campaign debates will be crucial. According to the polls, 20 percent of the population had not yet decided their vote.

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FINAL REMARKS

We Mexicans like rhetoric, so we often say that the elections will be a turning point for the country... But, seriously, it could be true on this occasion. What is at stake? If the PRI wins by a huge majority, in the short term, a great danger for the economic system could be averted: central bank autonomy and the laws for a responsible budget would shield the economy. Nevertheless, public finances will come under pressure for two main reasons: first, from interest groups clamoring for a piece of the public pie, and secondly, because of increased government spending to artificially foster economic growth.

A greater danger still lies in public and national security. In this field, in local PRI administrations, especially in the state ruled by Enrique Peña Nieto, change has been regrettably absent. With the exception of the State Security Agency (ASE), the police and the justice department are far from a source of pride for the former governor. The same must be said for almost all the other PRI governments. If they have a secret weapon to fight against criminal organizations, it has been very well concealed. For the foreseeable future, Calderón's strategy (the display of federal forces) will prevail until a new paradigm is found. In my opinion, law enforcement in both the local and state governments must be the priority.

In the political arena, the forecast is gloomier. A PRI with a huge majority is probably the greatest risk to Mexico's democratic progress over the last decade. The main obstacle to improving governance is not the lack of majorities as Enrique Peña Nieto states. Almost all the budgets since 1997 have been passed by a virtual consensus. It is true that no administration since Salinas has had a two-thirds majority to be able to change the Constitution and pass the so-called structural reforms, but a new tax law does not require such a majority, and the PRI has had a majority in the Congress and did not move forward. It is the same with other pieces of legislation.

The main problem of Mexico's democracy is a double-entry one. On the one hand, with the democratic race for power, we discovered that Mexico is a federation and must be ruled by three levels of government. As opposed to the U.S.

experience, Mexico has never had a strong local tradition of self-government. The driving force has been always the central government. So, in reality, the federal system is not as stable as it looks in the Constitution.

On the other hand, Mexico has been ruled during the last century by the so-called spoils system, so we are missing a professional administration, and this is particularly visible in sensitive areas like customs and immigration. The exception confirms the rule; the federal police force is a very recent achievement of the current administration. Mexico is still lacking professional agencies in many fields.

The new government's central project should be to reform public administration before stability suddenly turns to brittleness.

If the right-wing PAN wins, it will have a third opportunity to accomplish all the points that the PRI is not able to because of its very nature. And these are:

- 1) carrying out the administrative reform;
- 2) articulating the federation to improve the system's governability;
- 3) putting an end to union privileges; and
- 4) opening up the economy.

Are they going to do that? I am not sure, but it is obvious to me that this will be their last chance. As for the leftist coalition, it is interesting to see their new program focused on values and, mainly, love. Andrés Manuel López Obrador is trying to change his bad reputation for intolerance and disrespect for the rules and the rule of law. In the leftist discourse, the pursuit of happiness is becoming the right to love... or the compelling force of a Valentine. Seriously speaking, Andrés Manuel López Obrador is leaving behind his confrontational rhetoric in order to occupy the center and fight for the independent vote. I am not sure that he will succeed, but he is going to do his best, and even if he is not the favorite second best in the beginning of the race, he cannot simply be disregarded.

As I said, the healthy, democratic uncertainty of the election results is good news for a young democracy. **MM**