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The absence of an antihegemonic pre-electoral coalition in the State of Mexico's Governorship

La ausencia de alianza antihegemónica en la gubernatura del Estado de México

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Abstract: Literature on pre-electoral coalitions underlines political hegemony, erosion and electoral cycles as determinants for the creation of antihegemonic coalitions. However, in governor elections, the previous conditions appear without the expected results. What is impeding them? It is argued that the lack of local concurrence, few simultaneous elections and electoral nationalization inhibit the formation of this type of coalitions. In order to test the argument, we selected the State of Mexico as an example of a *negative case* and compared it transversally and longitudinally resorting to a *case study approach*. This paper aims to reveal the conditions that systematically inhibit the formation of antihegemonic pre-electoral coalitions. Findings include predominance of *officialist coalitions*, absence of positions for antihegemonic negotiation and greater dependence on national resources. It is concluded that the electoral cycle and the state's political dimension increase the nationalization of the election.

Key words: pre-electoral coalitions, case studies, negative case, governor elections, State of Mexico.

Resumen: Estudios sobre alianzas electorales subrayan a la hegemonía política, erosión y ciclo electoral como determinantes para la generación de alianzas antihegemónicas. No obstante, en elecciones para renovar las gubernaturas aparecen las condiciones enunciadas sin el resultado esperado. ¿Qué factores lo inhiben? Se argumenta que la no concurrencia local, escasas elecciones simultáneas y la nacionalización electoral impiden la formación de este tipo de alianzas. Para probarlo se seleccionó al Estado de México como un ejemplo de *caso negativo,* y desde un *enfoque de estudio de caso* se comparó transversal y longitudinalmente. El objetivo es revelar los condicionantes que de forma sistemática inhiben la formación de la alianza antihegemónica. Los hallazgos son el predominio de *alianzas oficialistas*, la ausencia de cargos para

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la negociación antihegemónica y mayor dependencia nacional de recursos. Se concluye que el ciclo electoral y la dimensión política de la entidad incrementan la nacionalización de la contienda.

Palabras clave: alianzas electorales, estudio de caso, caso negativo, elecciones de gobernador, Estado de México.

Introduction

Recent comparative research detected the presence of three conditions to forge antihegemonic or "against nature" alliances: hegemony and officialist erosion, electoral cycles and the fracture of elites, and available PRI (*Partido Revolucionario Institutional*; Institutional Revolutionary Party) members with subnational empirical evidence (Reynoso and Espinosa, 2017: 410-416). The enquiry acknowledges the challenge posed by the study of the state of Mexico because it seemingly met most of the conditions of the cases reviewed, though with results, at least, "unexpected" (Espinosa *et al*., 2020).

In this regard, the question is: what are the conditions and circumstances that inhibit the expected effect of independent variables about the concretion of an antihegemonic alliance? And specifically, what are the reasons in the state of Mexico not to forge PAN-PRD alliances? (*Partido Acción Nacional*; National Action Party, and *Partido de la Revolución Democrática*; Democratic Revolution Party, respectively). From the case study of the state of Mexico, it is argued that local nonconcurrence, few elections on the same day, as well as electoral nationalization inhibit the creation of antihegemonic alliances. The goal, in this regard, is to analyze the conditions and circumstances that inhibit the effect expected from independent variables on the result variable in the case of a negative outcome.

To do so, adding to the present introduction, the main affirmations of the theory as regards electoral alliances and negative cases will be outlined. Following, we will discuss the approach that focuses on case studies from a comparative perspective; later on, the case of the state of Mexico and its four governor elections will be revised presenting the limits for the standard explanation, and then disclose the factors that prevent the forging of antihegemonic alliances for such position. Finally, a balance of the findings as well as the main conclusions will be presented.

Theory on electoral alliances and negative cases

On the whole, pre-electoral coalitions or electoral alliances are understood as "the set of parties that do not compete independently in an election, either because they agree to coordinate their campaigns publicly, launch joint platforms or candidates, or else, govern collectively after the election" (Golder, 2005: 652); or also as "collective action strategies between parties that imply a negotiation process that defines costs and benefits obtained by each of the parties and which are, hypothetically speaking, willing to pay in order not to compete independently" (Méndez, 2012: 151).

The explanations offered by the literature distinguish the forging of alliances in democratic and authoritarian environments. In democratic environments, either parliamentary or presidential, the literature attributes the formation of alliances to institutional design, i.e., de-proportionality; or else, to the party system as the number of them in the election, and to the ideological profile of the contenders (Golder, 2005 and 2006). In like manner, there are works that recognize the joint incidence of electoral regulation, competitions and ideology in the forging of an alliance (Méndez, 2012); while others focus on more succinct explanations such as electoral regulation (Clerici and Scherlis, 2014), volatility, and margin of victory as signals for the next election (Kellam, 2015).

An additional side has emphasized the multilevel version, that is to say, the various strategy levels and negotiations that may foster or not, the forging of alliances. It retrieves restrictive normativity (Machado, 2009), territorial penetration (centralized decision) and dissemination (decentralized decision) of political parties (Cruz, 2019), the presence of a divided vertical government (president and governor of different parties) (Miño, 2014), the fragmentation and federalization of the party system (Mauro, 2020; Duque, 2020), and poor ideological profile of parties (Duque, 2020) as key factors to forge electoral alliances.

Conversely, in competitive authoritarian regimes, opposing alliances are forged to maintain minimum numbers, increase their vote turnout or else actually defeat the official parties. Due to the above, this sort of opposition alliances in scarcely democratic contexts are understood as "temporary and convenient "negative" alliances based on their common antipathy toward the government regime" (Howard and Roessler, 2006: 371), which is usually characterized by "inequality and asymmetry in terms of competence" (Reynoso and Miño, 2017: 57).[1]

1 For Wahman (2013: 19), an opposing electoral coalition "is present when all the main political opposition parties are comprised in a common pre-electoral coalition".

Wahman (2011) points at the proclivity of parties to forge opposition alliances when they perceive that a victory is likely and are capable of defining an antiregime joint agenda. Gandhi and Reuter (2013) find that official electoral coercion and certain permanence of the political opposition are the triggers to forge opposing alliances. They are created to add votes for the opposition supported on the material and political benefits that would be obtained from the defeat of the regime (Ong, 2022).

Studies on Mexico have proven their hypotheses on the basis of bibliography on presidential governments in democratic contexts (Reynoso, 2011; Méndez, 2012; Miño, 2014; Devoto and Olmeda, 2017; Spoon and Pulido-Gómez, 2017 and 2020; Bruhn, 2021), considering the volatility, margin of victory, regulations, competitiveness,[2] and ideology as crucial values to forge ideological alliances.

However, they offer little explanatory power where margins of victory are ample or when parties with opposing ideologies join, that is, when so-called antihegemonic alliances are forged.[3] These are better supported on research works produced in hegemonic or authoritarian contexts, characterized by clientelist practices in political doings (Hendrawan *et al.*, 2021) and/or where the surviving parties dominate in the context of formally democratic elections (Kavasoglu, 2022). Factors such as hegemony, officialist erosion and the electoral cycle are key configuration aspects in the Mexican subnational context (Reynoso and Espinosa, 2017). In spite of analytical advances, some cases complicate recent theorizations because the independent variables do not produce the expected effects. We have scenarios where, at first sight, we notice a hegemonic or dominant electoral presence, the officialist erosion is displayed in the heterogeneous margins of victory, electoral concurrence is experienced, and nevertheless, there is no antihegemonic alliance.

We believe that a thorough review of the negative cases may contribute to the development of theory on electoral alliances from a comparative standpoint. In the face of the historical national bias of a large part of

2 In the context of recent or new democracies, this means that large and small parties, respectively, intend to maximize their odds of success and ensure their survival (Reynoso, 2011); and, where the party-voter relation bases upon political support actions in return for goods of services (Spoon and Pulido-Gómez, 2017).

3 For example, Bruhn (2021) argues that confidence is a weighty element to forge alliances between ideologically distant parties; however, if we think of the subnational level, it does not answer why the parties themselves have not managed to articulate associative participation figures in certain federated states, while not in others.

the research on comparative politics and their blatant instrumental limitations to incorporate very particular realities, "studies on regional and local politics have an elective affinity with case studies"[4] (Suárez-Cao *et al.,* 2017: 19).

Even if the literature suggests avoiding the selection of cases on the basis of the dependent (King *et al.*, 2000: 150), researchers have to become involved in cases with and without interest (Gerring, 2008). In order to be valid and productive, Mahoney and Goertz's suggestion (2004: 654-655) is to select relevant negative cases (in function of the independent) which exhibit conditions similar to the positive.[5]

In this regard, negative cases are an important source of analytical thinking, as not only they suppress biases (Emigh, 1997) and increase general knowledge on the object of study, but enhance the comprehension necessary to be incorporated into theorization (Bazeley, 2009: 12). They are particularly useful because: a) as a consequence from missing backgrounds and divergent returns, they favor the construction of causal arguments; b) they allow distinguishing relevant elements, processes, structures and patterns from those which are not; and, c) they represent the necessary anomalies to rethink theoretical applications and broaden the scope of theory as a set (Emigh, 1997: 656-658).

The importance of a negative case is in the absence of the phenomenon as a result of interest, though, above all, it enables us to find the circumstance in which it differs with positive cases; in this regard, it produces a dichotomic sense in the dependent variable (Della Porta, 2008: 204). In reality, negative cases are conceived as such only because there is knowledge of the positive ones in relation with their configurations and observables (Della Porta, 2008); in any case, the bulk of positive cases is where, mainly, the available theories have been built upon (Emigh, 1997: 666). Therefore, the positive cases are also resorted to ascertain which of

4 The case study method considers the thorough analysis of an interpretable whole and intends to grasp complex units by means of similarities and differences (Vennesson, 2008: 204). For Gerring (2004 and 2008), it also includes definitions of cases in accordance with parameters of representativity; variation —either in independent (X), ort in some cases, of the dependent (Y)—; similarity or width of existing values between cases in a determinate set, among others.

5 That is to say —and in the contexts of what Suárez-Cao *et al.* (2017) define as multi-affinity identification—, there is need to select cases where in spite of the negligible registration of the phenomenon, its occurrence has been deemed plausible according to the configuration of the explanatory.

them —though particularly the negative ones— is more relevant for the analysis and as potentially challenging for the theory (Mahoney and Goertz, 2004: 654).

Case studios from a comparative standpoint

As it is the case in large N comparative studies, the standpoint focused on variables offers us reliability and external validity because evidence "travels" through various countries, states and years. In such manner that the relationship between X and Y is taken for granted from the measurement of the impact of the independents on the dependents based on the calculated odds, controlling by other variables and maintaining constant values. However, as recognized, statistical exercises demand explanations for the way X impacts Y, in such manner that it explicitly manifests the causal connection. To find out this relationship, it is necessary to leave the perspective centered on variables and enrich the analysis from a case study approach, in which theorized variables express, emphasizing stories, conflicts and processes in specific contexts.

Particularly, negative cases help us contrast the absence of issues present where the expected result is obtained. Also, they retrieve the presence of theorized variables and specific conditions that may inhibit it. The task is relevant because large *n* comparative studies usually omit those backgrounds, inhibitors or reducers in the causal relationship established in some cases.

The state of Mexico is one of the cases identified as challenging for comparative literature (Reynoso and Espinosa, 2017; Espinosa *et al*., 2020) for in spite of the record of variables and conditions studies, it does not present the antihegemonic alliance, as visualized in Chart 1.[6] Such state —in the group in row 1— presents neither antihegemonic alliances neither government alternance despite the favorable conditions for their concretion (Arzuaga *et al*., 2007; Espinosa, 2015). Thoroughly studying it may strengthen the theorizations on electoral alliances and alternance (Della Porta, 2008: 202-204).

In the text, case study is understood as: "the intensive study of a single case for the purpose —at least in part— of learning about a larger class of cases (a population)" (Gerring, 2008: 1138); while a *case* —strictly speaking—, "an example of a class of events" (George and Bennett, 2005: 17). In this regard, when the state of Mexico is analyzed as a *case*, we will apprehend an instance

6 All of the charts are in Annex, at the end of the present article.

of states with no risk of antihegemonic alliances; and the *case study* analysis allows a detailed or deep review on the relevant dimensions of the context.

Case studies are a suitable tool to outline and support, empirically, causal arguments in political science (Crasnow, 2012: 657). Historic and/or longitudinal research is fundamental for the present study for if a unit is observed in an isolated manner (at a single point in time), it would be hard to offer solid evidence for the construction of causal propositions (Gerring, 2004: 344), due to the absence of variation (between cases) and the impossibility to distinguish between systematic and conjunctural factors (Kaarbo and Beasley, 1999: 387). If it is considered that a sample is composed of units located at particular points in time (Gerring, 2004: 342), incorporating the analysis on the same spatial unit (state of Mexico) at various moments in time (1999, 2005, 2011, 2017) offers various methodological advantages. In particular, it favors the construction of hypotheses (Della Porta, 2008: 218) and increase the levels of "abstraction making justice to the context in which the cases develop" (Palmberger and Gingrich, 2014: 95); also, it allows for tracking important changes over time (Kaarbo and Beasley, 1999: 386); and, helps to define similarities in positive and negative cases (Mahoney and Goertz, 2004: 655).

In order to review the case study, we will proceed as follows: firstly, the three independent variables, disclosed in recent studies, will be revised in detail for the purpose of empirically demonstrating the conditions to generate an expected result; then, an explanation for the absence of effects will be given considering the specificities of the state in the set of positive and negative cases as well as the unique qualities of this state.

Hegemony, electoral cycle without vertical concurrence and fracture of elites as a background for antihegemonic alliances in the state of Mexico

The hegemony of PRI: absence of alternance, PRI alliances and margin of victory

The absence of alternance in government is a constant in the case study. The state of Mexico and Coahuila are the only two states that up to February 2023 have not experienced a political alternance in the state government. Part of the explanation offered has to do with the interaction between electoral alliance and opposition candidate, who in the case of being external (former PRI militant, entrepreneur or citizen) is propitious for alternance (Espinosa, 2015). In this state, where this combination has not occurred, it would seem impossible to change officialism, though Coahuila experienced

a PAN-PRD alliance in 1999, which in any case did not produce alternance. The state of Mexico is the only state which has neither had a PAN-PRD antihegemonic alliance nor experienced alternance in state government.[7]

Previous studies have identified this "anomaly" in the state of Mexico, given the segmentation of its local and federal legislative elections, in which there are usually high electoral competence levels and alternance, however, not in the state government (Arzuaga *et al*., 2007; Cedillo, 2012).

Other indicators of the officialist force are individual participation in elections and favorable conditions for adding political partners in the alliance when more competitive elections take place. The supposition is that forging alliances intends to increase their vote turnout. As noticed in Chart 2, with the exception of 1999, PRI has forged "PRI" electoral alliances, adding partners every electoral cycle.

Chart 3 shows increasing margins of victory for PRI, above 30% in the analyzed period. Between 1999 and 2005, it barely increases six percentage points, but has an increase of 14 points in the 2011 elections; these two figures show the consolidation of its electoral hegemony. It grows slightly more than 15 percentage points between 1999 and 2005, and the difference with its closest competitor reaches 15 points in 2011. In that year, electoral results and margin of victory exhibited the slim chances of PAN and PRD to compete on their own, or as an alliance with PAN or PRD ideology; only an antihegemonic alliance might work in such asymmetric electoral scenario.

It is not idle to bring to mind that with the ascension to power of MORENA, the 2017 election shows a clear breakage in the partisan dynamic in force for at least three decades, and was evinced in electoral registrations. Between 2011 and 2017, PRI lost 27.24 percentage points, and 38.14 points of margin of victory. The election was decided with a margin of victory of merely 2.87%.

The electoral records of the potential PAN-PRD alliance reveal that the hegemonic PRI in the state of Mexico would have been defeated in 1999 and 2005; however, data show it was not enough to win the state government in 2011 and 2017. Even if in the elections to renew governor it was never possible to forge an antihegemonic alliance opposing to PRI, the successful ascension of MORENA at national and local level triggered the forging of an officialist alliance composed of PRI, PAN and PRD to retain-defend the state government in the hands of PRI. Over time, only the

7 It is worth stating there is a "new" contranatural or antihegemonic alliance composed of PAN, PRI and PRD against the hegemonic force of MORENA as of 2018.

common enemy to defeat changed: PRI up to 2017, and now MORENA in the 2023 elections.

Electoral cycle and concurrence with presidential elections

The electoral cycle is expected to foster antihegemonic alliances whey they are nonconcurrent with presidential elections and when many elections take place the same day (Reynoso and Espinosa, 2017: 414-415). The state of Mexico meets this postulate for its elections to renew the local Executive took place in 1999, 2005, 2011 and 2017, that is to say, a year before the presidential elections in 2000, 2006, 2012 and 2018; although there is no full vertical concurrence, there is clear "closeness" between the election of state governor and president.

To enquire whether this distorts the hypothetic relationship, all the cases with such characteristic were examined. In 1999, the review of electoral calendars for governors produces seven states with this closeness to the presidential election: Baja California Sur, Guerrero, Quintana Roo, Hidalgo, state of Mexico, Nayarit and Coahuila. All lack vertical-presidential concurrence, but the thorough review shows the presence of local concurrence,[8] an aspect omitted in previous studies.

In the group three patterns are distinguishable: states with local concurrence (Baja California Sur, Quintana Roo, Nayarit, Coahuila); states with differed local concurrence[9] (Hidalgo and Guerrero); and, states with no local concurrence (state of Mexico).[10]

Out of those with local concurrence, Nayarit had an antihegemonic alliance and accomplished the first change in power in 1999, and in 2021, once again, there was an antihegemonic alliance;[11] Coahuila also tried a PAN-PRD alliance in 1999, and lost the election; Quintana Roo had a PAN-PRD alliance in 2016 —two years before the presidential in 2018— and accomplished the first alternance in state government; Hidalgo, one of the two states with differed concurrence, presented a PAN-PRD alliance

8 Understood as the simultaneous election of governor, local representatives and town halls.

9 Local elections held the same year, but in a different month.

10 The state of Mexico has never had local concurrence because the election of local representatives and town halls are still in the federal legislative calendar, but not in the months of March for local elections, and July for federal.

11 PAN-PRI-PRD alliance; it is worth mentioning that the first was as opposition to PRI hegemony; the second, officialist defensive against MORENA's national hegemony.

in 2010 —two years before the 2012 presidential election— and lost. That is to say, out of the seven states with no presidential concurrence, four that held simultaneous or differed elections at local level presented PAN-PRD alliances; this is a finding compatible with the hypothesis of no vertical concurrence and many elections on the voting day.

Baja California Sur and Guerrero did not have any PAN-PRD alliance in spite of sharing the same conditions of the previous four, though since they modified the electoral calendar to match it with the federal lost their inclusion in the analysis group after 2011.[12]

By 2017, only three states had governor elections a year before the presidential: state of Mexico, Coahuila and Nayarit. As noticed in Chart 4, the first is the only without vertical and local concurrence. In 1999, there was at least seven states with governor elections in a single year, a condition deemed a key factor for the concretion of PAN-PRD alliances, in this way it made sense to register them in Coahuila and Nayarit, as in addition to the vertical non-concurrence there were many elections (governor, local representatives and town halls[13]). By contrast, the state of Mexico has two conditions that hinder antihegemonic alliances: absence of local concurrence, and after 2011, few governor elections the same day as in other states.

Although closeness to presidential election is not exclusive of this state because it was shared it with six states in 1999 and with two in 2017, these had at least an antihegemonic alliance in the analyzed period. What is distinctive in the election of the state of Mexico is that it *systematically* combines the absence of vertical concurrence and the absence of local concurrence. This makes it difficult to negotiate an eventual opposition alliance in this state, since there is only the election of governor; none can offer the other payments or benefits attractive to join.

12 With the 2014 electoral reform, some states modified their electoral calendar to address the disposition of June for the local election to concur with the federal (Cámara de Diputados del H. Congreso de la Unión, 2014: 7-8), while some others adjusted the election year for governor so that it matched federal election. Due credit to Javier Arzuaga for the observation of multiple factors which made other states change their local electoral candidates, from organizational costs to problems related to organized-crime.

13 However, it is still pending to explain why Baja California Sur did not have a PAN-PRD alliance over the entire period, despite having the same conditions. In 2021, it registered the PRI-PAN-PRD antihegemonic.

Available elite and PRI alliances[14]

In the renewal of governor in 1999 and 2005, the state of Mexico registered the most competence inside officialism. It has been documented that selection processes of candidates are moments of division because the governor in office and his candidate compete with advantages against other candidates, who ask for impartial mechanisms to define the candidacies. By and large, it is almost impossible to counteract the candidate of the governor in office (Hernández, 2008: 66-67). When the contest closes and this candidate is imposed, some candidates left PRI and looked for a candidacy in the opposition, causing a triple effect: divide the local PRI, offer competitive candidacies for the opposition, and make the formation of PAN-PRD alliances easy, since it is an ideological neutral in the face of left and right stances of traditional opposers (Salazar, 2017).

In 1999, Arturo Montiel's candidacy provoked the renounce of Humberto Lira Mora (Hernández, 2005: 187-188), who joined the ranks of PRD in the state of Mexico, but was not the opposition candidate; this was also the case of Isidro Pastor —president of PRI in the state of Mexico— in 2005, who moved away from politics, but did not emigrate in the electoral conjuncture to the opposition to head an alliance. The main grudge in both cases came from the favoring of a certain candidate by the governor in office (Niño, 2017). This practice was repeated again in 2011, when the candidacy had to be chosen and Eruviel Ávila strongly intended to be, though he was not part of the group of by-then Governor Peña Nieto. Unlike Lira and Pastor, the governor gave up on his preferences in the face of the risk of division amidst a competitive campaign and Eruviel Ávila's extensive electoral base in Ecatepec, one of the most populated municipa-lities in the state (Vivero, 2017). By 2017, there is no record of renounces in the officialist campaign of Alfredo del Mazo Maza.

Revisiting the state of Mexico: conditions that inhibit PAN-PRD alliances

Even if the theorized variables do not generate their expected effect, it is the moment to revise what the explanatory conditions empirically registered in electoral processes are. This entails revising the policy alliance of political parties over time, the effects of the electoral cycle and the particular political conditions to renew governor.

14 Although this dimension was not verified in many cases, it is presented because it has been a recurrent explanation for the absence of antihegemonic alliance in the renewal of the state government.

Alliance policy in the state of Mexico, 1997-2023

Electoral alliances have been intensively used in elections in the state of Mexico. Out of 2133 registrations, the most have been ideological alliances (PRI, PAN and PRD and MORENA) with 84.32% (1,799), and to a lesser extent, antihegemonic alliances (PAN-PRD, PRI-PAN-PRD) with 15.65% (334); out of this group, PAN-PRD alliances account for 9.79% (209), a marginal option (see Chart 5). The party with the most alliances has been PRI with 48.61%; MORENA, 18.09%; PRD, 13.78%; and, PAN, barely 3.84%. The last two figures are key, they show the traditional opposition far from PAN-PRD alliances as instruments to defeat PRI. PAN militants in the state of Mexico have privileged their participation on their own and to a lesser extent, ideological alliances before joining with PRD. Partly, this makes sense due to the increase complexity of elections in the state of Mexico as of the 1990's and the facture of PAN between those dogmatic and the pragmatic in the party.

Three alliance tendencies are identified over the period under study. The first, the solitary participation of PRI, and ideological alliances of PAN and PRD (1997-2000). The second is PRI's exclusively alliance participation, PRD's ideological alliance and the poor forging of PAN ideological alliances (from 2000-2017). The third is a change stage: PRI presents its last ideological alliances, late PAN-PRD alliances in concurrent elections —though not for governor—, while MORENA alliances appear and for the first time an alliance between PAN, PRI and PRD (from 2018 to present).

For as long as PRI was in federal and local alliances between 2003 and 2018, political opposition displayed differenced patterns: PAN forged alliances for governor in 1999 and 2005, for the federal election in 2000, and for municipal presidencies in 2009 and 2015, though in the rest of elections competed on its own. For its part, PRD forged alliances in federal elections in 2000, but not in local elections in 2000 and 2003, and between 2005 and 2012 forged more federal than local alliances. PAN and PRD competed on their own between 2015 and 2017. The late forging of PAN-PRD antihegemonic opposition alliances took place in the concurrent 2018 elections, while antihegemonic PAN-PRI-PRD officialist alliances occurred in the concurrent in 2021.[15]

15 It is not idle to underscore the substantive change in antihegemonic alliances. Between 1991 and 2020, PAN-PRD alliances in governor elections configure as strictly opposition alliances with the intention to defeat the hegemonic or dominant PRI presence, which managed to receive more than 50% of the voting. PAN and PRD were the opposition

Electoral cycle, nationalization and candidacies

Even if it is expected that non-vertical concurrence and holding elections on the same day incentivize the formation of PAN-PRD alliances, in the thorough revision of the case, the state of Mexico verifies nonvertical concurrence, though unusually it records nonlocal concurrence and scarce elections on the same day. This seriously complicates local politicians because they do not have positions in return for an antihegemonic opposition alliance. The elections of local and federal representatives, municipal presidencies and senators are always held a year later. There were many elections on the same day in other states in 1999, nevertheless, as noticed over time, it reduces to three in 2017 and two by 2023. In this year, only Coahuila will be available for a possible national negotiation, in which PAN and PRD are opposition for in this state and those spaces serve as negotiation resources for local politicians. Opposition in the state of Mexico depends to a large extent on access to resources in other spheres, where they would have to negotiate and receive other sorts of interchange resources at the local level, interesting for national politicians. As displayed below, the state of Mexico has visible characteristics that promote sufficient incentives for multilevel negotiations.

Owing to its dimensions, the state of Mexico not only holds the largest population[16] and nominal listing,[17] accounts for the largest legislative contingent in the federal congress by state (64 legislators representing

historically built in the Mexican system, these forces, firstly from the right and later, from the left, competed in subnational electoral arenas, mostly with bipartisan systems to defeat PRI officialism. However, after 2021, antihegemonic alliances also appeared in order to renew governorships with different characteristics: PRI stopped being the common enemy to ally with PAN and PRD; the dominant position or electoral hegemony was taken by MORENA and its alliances, mainly in *federal* elections; and the new antihegemonic alliance was inaugurated as officialist in the sphere of governorships because the governor in office was a member of these new antihegemonic alliances. In this regard, they wanted to retain the governments (sot so much defeat MORENA as it was not in power in the state) and halt what they called the "erosion of democracy" (Salado, 2022). Without a doubt, MORENA's electoral advance altered the dynamic which the prevailing antihegemonic alliances had had for thirty years.

16 16,992,418 inhabitants, which accounts for 13.48%, regarding the total population of the country (Instituto Nacional de Estadística y Geografía, 2022).

17 It was 12,394,846 in 2021 election (Instituto Electoral del Estado de México, 2021); Mexico City had by June 30th, 7,764,204 (Instituto Electoral de la Ciudad de México, 2021).

12.8% out of 500 representatives)[18], and because of its closeness to Mexico City, the local politicians reach national noticeability, and usually venture as presidential candidates or members of the federal cabinet (Hernández, 2005 and 2015). In this way, the electoral cycle ends up nationalizing significant resources that may be controlled by controlling the government in the state of Mexico, with the clear goal of increasing their odds of succession in government and in the presidential election. In this context, by nationalization, we understand the centralization of decisions made by the dominant coalitions of political parties at national level regarding party and electoral strategies at various levels.

However, nationalization does not mean the arbitrary meddling of national elites, it refers the decisive influence of national partisan elites when political processes concur with presidential elections —called first-order— (Carreras, 2018: 543) and/or when highly-relevant particular spaces for national politics are detected (Battle and Puyana, 2011: 53).

The opportunity window for the local-national interchange of the opposition is provided by the national electoral calendar when presidential candidates are under definition. As we will expose following, evidence reveals that when the local opposing party was the same as the officialist president's party, the heavy influence of presidency was strengthened in the state; when the local opposition party was also national opposition, the influence of the national dominant coalition of the party on the local sphere increased.

PRI state officialism does not experience this situation because it never has lost its position of state incumbent[19] and has resources so that the governor and his party (Arzuaga *et al.*, 2007) may "add votes allotting seats" (Reynoso, 2010), hence, fulfilling agreements with other parties when candidacies are defined, or even conceding positions in public state administration.[20]

18 In descending order: Mexico City contributes with 52 representatives (10.4% of the total Representative chamber); Jalisco with 33 (6.6%); Veracruz, 31 (6.2%); Nuevo León, 22 (4.4%); Puebla, 20 (4%); and Guanajuato, 18 (3.6%) (Cámara de Diputados del H. Congreso de la Unión, 2021).

19 Indeed, PRI up to 2000 national and state officialism at once; from 2000 to 2012, it was national opposition and state officialism. During Peña Nieto's administration (2012-2018) doubly officialist; while at present, it is national opposition–state officialism.

20 The recent integration of the officialist (PRI-PAN-PRD) alliance seems to strengthen the interpretation that the governor candidate of such alliance will come from PRI; in turn, the presidential candidate of this alliance will come from PAN. This fact shows the multilevel interchange that takes place among parties.

By contrast, for the opposition this cycle acts against it for there are neither conditions for local and national negotiations nor interchanges with credible promises (Reynoso and Espinosa, 2017: 417). As previously observed, many elections increase the resources to be allotted to candidates and opposition parties to forge the alliance; in the absence of groups for interchange, the option is to reach out for national resources.

Since PAN was in power between 2000 and 2012, the elections to renew state governments may be grouped into those with no federal government influence (1999 and 2017), and those that experienced it (2005 and 2011).

In 1999, PAN's candidate José Luis Durán was a local politician with a traditional dogmatic profile, where the governmental experience was incipient, mainly as regards local representations and town halls —out of the influence from PAN federal government, with increased competitivity— and PAN's antiregime struggle took place at national level (Chart 6). For her part, 2017 Presidential Candidate Josefina Vázquez showed the dynamic and wear of PAN after being in power for two presidential terms; she did not have supporters in the state, neither had she developed her political or administrivia career there, nor had ever been a local representative.[21] Therefore, her candidacy for state governor made it clear the depletion of local PAN bases, the division of PAN in the state of Mexico (traditional vs. neo-PAN militants), ideological reinforcing, and mainly, the higher centralism of PAN national leaders. These two candidates, Durán Reveles and Vázquez Mota, evince the influence of PAN dynamic at two contrasting moments: the first, when the party was the main national and local opposition, and the second, national political electoral wear with no local competitive groups.

The influence of PAN federal government was noticed in the electoral processes in the state in 2005 and 2011. After an accidented process Rubén Mendoza Ayala won the state of Mexico PAN's internal elections, however, owing to an applicable inconformity by the losing candidate, José Luis Durán Reveles, the candidate was appointed by the National Executive Committee with a divided result: 17 in favor, 14 against, and 3 abstentions (Román, 2005).

The presidential and party insistence on ratifying Mendoza Ayala in spite of raising tensions and creating division between state party leaders could not be understood without the division that was taking place in the succession of PAN national leaders, headed by presidential couple Vicente

21 Her career essentially was at the federal level: a secretary in federal governments at two moments, federal representative and presidential candidate from PAN in 2012.

Fox-Martha Sahagún (2000-2006); Santiago Creel and Manuel Espino (PAN's Secretary General, 2002-2004) on one side; while on the other, Luis Felipe Bravo Mena (president of PAN's National Executive Committee from 1999 to 2005), Carlos Medina Plascencia, and Felipe Calderón. Rubén Mendoza Ayala was appointed as a candidate in November 2004, when Luis Felipe Bravo Mena was about to leave the direction of the national executive committee.[22] With the triumph of the national leaders, a PAN-PRD alliance was unthinkable due to the confrontation between Fox and López Obrador, the most likely PRD candidate.

Owing to the forging and cancelation of a national PAN-PRD anti-alliance agreement, which included the state of Mexico[23], the legislation that disincentivized the union of these parties was reformed and Luis Felipe Bravo Mena, former particular secretary of President Calderón[24], was registered as a candidate for governor. The 2011 election was somehow influenced by PAN federal government against the candidates and local leaders.

In their way, presidents from PAN subjected the party in the selection of candidates in the state of Mexico, and the governor elections were used as hard currency in national strategies. That is to say, despite the lack of vertical concurrence, inductively, history has taught us that presidential succession has indeed influenced the likely integration of an opposing alliance in the state of Mexico.

PRD in the state of Mexico experiences the same pressures, though extremely, because if has systematically been federal and local opposition. It wholly depends on the national party, particularly, in its dominant

22 A year later, in 2005, Manuel Espino defeated Medina Plascencia and became president of PAN.

23 According to the sources consulted, "*PAN y PRI se comprometieron a abstenerse de formar coaliciones electorales en el Estado de México con otros partidos, cuyos principios e ideología fueran contrarios a los que sostienen en sus respectivas declaraciones de principios*" [PAN and PRI committed to avoiding the forging of electoral coalitions in the state of Mexico with other parties, with principles and ideologies alien to those in its principle declarations] (Saldierna and Pérez, 2010: 3). In this way, the former would not forge an alliance with PRD in the 2011 elections for governor, while PRI undertook to voting in favor of the Law on Incomes 2010. The agreement was disclosed in Mark 2010, when PAN militants intended to forge PAN-PRD alliances that year (Durango, Hidalgo, Puebla, Oaxaca, and Sinaloa), where these were known as "antinatural" alliances. However, some argue that the main factor of the antihegemonic alliance was the absence of leadership to channel the efforts (Vivero, 2017: 400).

24 And irreconcilable adversary of PRD presidential candidate López Obrador.

coalition at national level. Higinio Martínez postulated when Andrés Manuel López Obrador was PRD president while its founder, Cuauhtémoc Cárdenas, was governor of Federal District, which for his part, was the presidential candidate of PRD. As PAN over the 1990's, PRD also resorted to the few local politicians trained as local representatives, municipal presidents, or local state leaders (Chart 8).

The information reveals a clear closeness between López Obrador and Yeidckol Polevnsky, candidate to governor in the state of Mexico in 2005. She had a notable entrepreneurial career, though she only started in politics hand in hand with the favorite in the surveys in 2005. Though López Obrador, as a PRD leader, promoted alliances in 1999, in 2005, his clash with Vicente Fox due to the impeachment process cancelled every approach to forge a PAN-PRD alliance.

The influence of the presidential candidate, López Obrador, is verified in the 2011 state elections, when a close collaborator in his government, Alejandro Encinas, was appointed as candidate to governor for the state of Mexico, who as a native of this state had made a career in Mexico City's government, where he was a direct subordinate of the head of government, López Obrador. Despite entering into antinatural agreements in a number of states in 2010, a year later, the national PRD leaders and López Obrador rejected this sort of coalition in the state of Mexico. Though PRD in the state of Mexico never witnessed the meddling of a president from PRD, it indeed experienced the influence of their main presidential candidates, Cárdenas in 2000, and López Obrador in 2005 and 2011.

In 2017, López Obrador was no longer the main character in PRD, its governor candidate Juan Zepeda —with a short political career— expressed his disapproval for the forging of a PAN-PRD alliance, albeit in 2018, he was the only competitor on behalf of his party. If in previous years, the addition of these oppositions was able to defeat the local PRI, by 2017, the uneven presence in relation with PRI or MORENA had been a sufficient reason to forge an alliance as a sort of antihegemonic contention.

Conclusions

Recent studies reveal the absence of antihegemonic alliances in contexts where there are coordination efforts between local opposition alliances. Despite the presence of a heavy officialist hegemony, nonvertical concurrence and conflicts in the renewal of governor, no PAN-PRD alliances were

forged for state governorship. The state of Mexico is an instance of this type of states with neither antihegemonic alliance nor alternation in power.

The negative case study shows aspects omitted by previous research works: the joint absence of vertical and local concurrence, few elections on the same day, and electoral nationalization as strong inhibitors of the antihegemonic opposition alliance.

The thorough review shows the marginal use of alliances in general from opposition in the state of Mexico and the late arrival of antihegemonic pre-electoral coalitions, the temporal inconsistency of PAN and PRD alliance policy, the absence of positions that enable the negotiation of an antihegemonic alliance, the heavier dependence on their reception of national resources and the nationalization of the government competition due to the large amount of political resources at stake.

Although the election of the local executive is by the end of the term, in this regard, by the end of an electoral cycle, truth is, in fact, it is the beginning of the following cycle.[25] The large amount of political resources —which, ironically, cannot be utilized by local political elites to forge the antihegemonic alliance in the election of governor— place this election at the national level as a part of the national strategies of political parties and the incumbent federal government.

Seemingly, in the case of the state of Mexico, the multilevel dimension becomes acuter because of the electoral cycle and nationalization: antihegemonic opposition alliances need the centralized decision of political parties and president of the republic in the case of the federal officialist party. Probably, the alliance research on negative cases will be enriched with greater analyzes of antihegemonic alliances from a multilevel standpoint in Mexico and Latin America (Clerici and Scherlis, 2014; Miño, 2014; Cruz, 2019), as there is recent evidence of the officalism/opposition dichotomy to explain alliance congruence Clerici, 2018); a similar distinction as the one presented in this case study.

A number of points compose the research agenda. Firstly, verify the external validity of the hypothesis produced in other cases: the absence of local concurrence and scarce elections on the same day produce a negative

25 Certainly, Coahuila is on the same position in the calendar, though it has local concurrence and at once, lighter political weight: the size of its nominal listing and positions to be voted —local and federal which are decided by the governor— is negligible in comparison with the state of Mexico.

effect on the formation of antihegemonic alliances.[26] Secondly, verify that in addition to the absence of vertical concurrence and many elections on the same day, local concurrence is considered to favor antihegemonic alliances in positive cases. Thirdly, enquire on whether the electoral cycle and the absence of resources for the negotiation of antihegemonic alliance also explains the "iron-clad" discipline displayed by officialist politicians, who unlike what occurs in other states, PRI militants in the state of Mexico do not lead a possible antihegemonic alliance; finally, to analyze other negative cases such as Tlaxcala, where there is absence of a PAN-PRD antihegemonic alliance, though recently there is a PAN-PRI-PRD[27] alliance.

This document has at least three limitations. There is no comparative enquire on the absence of PAN-PRD antihegemonic opposition alliances, regarding the absence of officialist antihegemonic alliances composed of PAN-PRI-PRD; we did not deepen into the case of Coahuila, which shares with the state of Mexico, its position in the electoral cycle, and hypothetically, also experiences the nationalization of elections, and the concretion of antihegemonic alliances.

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26 Which may explain the permanence of officialisms, opposition weakness to forge effective contesting opposition alliances in competitive authoritarian regimes (national or subnational).

27 The state of Tlaxcala is another of the negative cases that have escaped the general alliance premises; in this state, the absence of antihegemonic PAN-PRD alliances in 2010 and 2016, and the presence of a PAN-PRI-PRD coalition in 2021 are notable.

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Annex

Chart 1

Presence and absence of PAN-PRD antihegemonic alliances to renew governors from 1991 to 2022, by federated state

PAN-PRD antihegemonic alliances	States	Frequency (%)
No	Aguascalientes, Baja California Sur, Campeche, Mexico City, Guerrero, Jalisco, state of Mexico, Michoacán, Morelos, Nuevo León, Querétaro, Sonora, and Tlaxcala.	13 (40.6%)
Yes, but it did not win	San Luis Potosí (1991), Tamaulipas (1992), Coahuila (1999), Colima (2003), Chihuahua (2004), Oaxaca (2004), Durango (2010), Hidalgo (2010), Oaxaca (2016), Zacatecas (2016), Chiapas (2018), Tabasco (2018), Veracruz (2018), Puebla (2019), Quintana Roo (2022).	15 (46.8%)
Yes, it won	Nayarit (1999), Chiapas (2000), Yucatán (2001), Oaxaca (2010), Puebla (2010), Sinaloa (2010), Baja California (2013), Durango (2016), Quintana Roo (2016), Veracruz (2016), Nayarit (2017), Guanajuato (2018), Puebla (2018), Chihuahua (2021).	14 (43.7%)
Total		32

Source: Own elaboration based on Reynoso and Espinosa (2017), plus websites of *Organismos Públicos Locales Electorales* [Local Public Electoral Organisms] of Chiapas, Tabasco, Durango, Quintana Roo, Veracruz, Nayarit, Guanajuato, Puebla, and Chihuahua. NB: do not add 100% for there are states with more than one PAN-PRD alliance over the term.

Chart 2

Members of electoral alliances to renew the government in the state of Mexico, 1999-2017

Year	PRI alliance	PAN alliance	PRD alliance	Other	New party
1999	PRI	PAN-PVEM	PRD-PT		
2005	PRI-PVEM	PAN-Convergencia	PRD-PT		
2011	PRI-PVEM-NA	PAN	PRD-PT-Convergencia		
2017	PRI-PVEM-NA-PES	PAN	PRD	PT	MORENA; independent candidate
2022	PRI-PAN-PRD-NA			MORENA, PT and PVEM	

Source: Own elaboration with data from Instituto Electoral del Estado de México (2022a), Hernández (2023), and Martínez and Dávila (2023).

Chart 3

Electoral results and margin of victory in the state of Mexico, governor elections, 1999-2017

Year	Officialism (PRI or PRI alliance)	First opposition	Margin of victory	Electoral offer	Vote turnover PAN+PRD (balance)
1999	41.6%	PAN-PVEM = 34.31%	7.29%	3 candidates	55.58% (+13.98%)
2005	47.57%	PAN-Converg= 24.73%	22.84%	3 candidates	48.98% (+1.41%)
2011	61.97%	PRD-PT-Converg= 20.96%	41.01%	3 candidates	33.24% (-28.73)
2017	34.73%	MORENA= 31.86%	2.87%	6 candidates	30.08% (-4.65%)

Source: Own elaboration with data from *Instituto Electoral del Estado de México* (2022a). NB: in 2005, PRD-PT had 24.25%; in 2017, an independent candidate participated for the first time. In 2017, PAN received 11.62%, and PRD, 18.46%.

Chart 4

Vertical and local concurrence, governor elections in three states, 1999-2023

Year	State of Mexico VC, LC	Coahuila VC, LC	Nayarit VC, LC
1999	0,0	0,1	0,1
2005	0,0	0,1	0,1
2011	0,0	0,1*	0,1
2017	0,0	0,1**	0,1****
2021	-	-	0,1
2023	0,0	0,1***	-

Source: Own elaboration with data from *Instituto Electoral del Estado de México* (2022a), *Instituto Nacional Electoral* (2022a) and OPLES in Coahuila and Nayarit. NB: VC, vertical concurrence; LC, local concurrence, presence was coded as 1, absence, 0. Elections of representatives and town halls in the state of Mexico take place on federal legislative elections every three years. *Coahuila in 2011 only had concurrence of governor and local representatives; ** in 2017, there was local concurrence, though town halls were only elected for a term of one year, so there were town hall elections in 2018; in 2020, local representatives were elected and in 2021, town halls. *** in 2023, there will be local concurrence of governor and local representatives. **** in 2017, Nayarit elected governor and town halls for four years; in 2021, there was local concurrence with the elections for governor, local legislative and town halls.

Chart 5

Electoral alliances in the state of Mexico (1997-2022)

Year	Position sought	Ideological alliances				Antihegemonic alliances	
		PRI alliances	Pan alliances	PRD alliances	MORENA alliances	PAN-PRD alliances	PAN-PRI-PRD alliances
1997	Senators	-	-	-	-	-	-
	Federal representatives	-	-	-	-	-	-
1999	Governor	-	1	1	-	-	-
2000	President	-	1	1	-	-	-
	Senators	-	2	2	-	-	-
	Federal representatives	-	36	36	-	-	-
	Local representatives	-	-	-	-	-	-
	Municipal presidents	-	-	-	-	-	-
2003	Federal representatives	36	-	-	-	-	-
	Local representatives	45	-	-	-	-	-
	Municipal presidents	124	-	-	-	-	-
2005	Governor	1	1	1	-	-	-
2006	President	1	-	1	-	-	-
	Senators	2	-	2	-	-	-
	Federal representatives	40	-	40	-	-	-
	Local representatives	38	-	45	-	-	-
	Municipal presidents	125	3	36	-	3*	-

Year	Position sought	Ideological alliances				Antihegemonic alliances	
		PRI alliances	Pan alliances	PRD alliances	MORENA alliances	PAN-PRD alliances	PAN-PRI-PRD alliances
2009	Federal representatives	31	-	-	-	-	-
	Local representatives	40	-	15	-	-	-
	Municipal presidents	125	1	25	-	-	-
2011	Governor	1	-	1	-	-	-
2012	President	1	-	1	-	-	-
	Senators	2	-	2	-	-	-
	Federal representatives	40	-	40	-	-	-
	Local representatives	40	-	-	-	-	-
	Municipal presidents	125	-	45	-	-	-
2015	Federal representatives	40	-	-	-	-	-
	Local representatives	42	-	-	-	-	-
	Municipal presidents	93	37	-	-	-	-
2017	Governor	1	-	-	-	-	-
2018	President	1	-	-	1	1	-
	Senators	2	-	-	2	2	-
	Federal representatives	41	-	-	41	41	-
	Local representatives	-	-	-	44	44	-
	Municipal presidents	-	-	-	114	118	-

Year	Position sought	Ideological alliances				Antihegemonic alliances	
		PRI alliances	Pan alliances	PRD alliances	MORENA alliances	PAN-PRD alliances	PAN-PRI-PRD alliances
2021	Federal representatives	-	-	-	19	-	23
	Local representatives	-	-	-	44	-	28
	Municipal presidents	-	-	-	120	-	72
2022	Municipal presidents	-	-	-	-	-	1
2023	Governor	-	-	-	1	-	1
	Total 2133 (100%)	1037 (48.61%)	82 (3.84%)	294 (13.78%)	386 (18.09%)	209 (9.79%)	125 (5.86%)

Source: Own elaboration based on data from Instituto Electoral del Estado de México (2022b), and Instituto Nacional Electoral (2019 and 2022b). *NB: Municipalities of Acambay (defeat), Temascalcingo (victory), and Temoaya (victory). Only relative majority federal representatives are considered.

Chart 6

PAN candidates with no influence from a unified government

Year	Candidate(s)	Origin
1999	José Luis Durán Reveles (in alliance)	PAN, local representative (1987-1990); federal representative (1991-1994); President of Steering Committee State of Mexico (1991-1994); municipal president of Naucalpan (1997-2000).
2017	Josefina Vázquez Mota (no alliance)	PAN, federal representative, proportional representation (2000-2003); Secretary of Social Development (federal) (2003-2006); Secretary of Education (federal) (2006-2009); federal representative, proportional representation (2009-2012); presidential candidate, PAN (2012).

Source: Secretaría de Gobernación (2021).

Chart 7

PAN candidates with influence from a unified government

Year	Candidates	Origin
2005	Rubén Mendoza Ayala (in alliance)	A militant in PRI for 20 years; militant in PAN (1994-2005); federal representative federal (1997-2000); municipal president of Tlalnepantla (PAN) (2000-2003); federal representative (2003-2006).
2011	Luis Felipe Bravo Mena (no alliance)	PAN, candidate to governor, state of Mexico (1993); proportion representation senator (1994-2000); national president of PAN (1999-2005); Mexico ambassador to the Vatican City (2005-2008); particular secretary of President Felipe Calderón (PAN) (2008-2011).

Source: Secretaría de Gobernación (2021).

Chart 8

PAN candidates with no influence from a unified government

Year	Candidate(s)	Party origin
1999	Higinio Martínez Miranda (alliance)	PRD, local representative (1990-1993); president of CDE PRD State of Mexico (1995-1997); delegate to National Executive Committee in Yucatan (1997-1998), and senator (1997-2000).
2005	Yeidckol Polevnsky Gurwitz (no alliance)	Entrepreneur, president of Cámara Nacional de la Industria de la Transformación, Canacintra [National Chamber of Transformation Industry] (2002-2004).
2011	Alejandro Encinas Rodríguez (in alliance)	PRD, federal representative (alternate to Demetrio Vallejo) (1985-1988); proportional representation federal representative (1991-1994); candidate to governor, state of Mexico (1993); organization Secretary in PRD National Executive Committee; Environment Secretary (1997-1999); Economic Development Secretary (2000-2002); Secretary General of Mexico City Government (2004-2005); Mexico City Government Head (2005-2006); candidate to president of National Executive Committee of PRD (2008); Proportional representation federal representative (2009-2012).
2017	Juan Manuel Zepeda Hernández (no alliance)	PRD, municipal president of Nezahualcóyotl (2013-2015), Proportional representation local representative (2015-2018).

Source: Secretaría de Gobernación (2021).

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