

Gubernaturas Cortas: Will Concurrence Change Mexican State Elections?

by

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ABSTRACT

One clause added to the Mexican constitution on February 10, 2014, set off a sea change in the way Mexican elections are conducted. By requiring states to hold at least one local election concurrent with federal contests, the timing of entire races changed, most notably with regard to a number of gubernatorial races, and Mexico embarked on an adventure of creating concurrence. The result is a wave of governors serving terms of two, four or five years instead of the customary six, creating so-called gubernaturas cortas (short governorships). This phenomenon has potential implications for the relationship of state and federal elections and voter turnout in state races. This work analyzes the potential impacts of concurrence by looking at four previous cases of states that have moved to concurrent elections: Yucatán, which moved its gubernatorial elections forward a year to coincide with the presidential elections beginning in 2012; Guerrero and Baja California Sur, which brought their gubernatorial elections two years forward beginning in 2015 to coincide with midterm elections for the Chamber of Deputies; and Michoacán, which pushed its elections two years back and split the elongated term in two, in order to line up with the federal calendar in 2015. It argues that concurrent elections reduce the disparity between gubernatorial and proportional representation deputy performance, particularly when the election is concurrent with the federal midterm, but that variation continues to exist due to strategic voting effects and the attractiveness of individual candidates.

DEDICATION

To the memory of Will H. Moore III, one of the brightest and most thoughtful people I ever knew.

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CHAPTER 1

INTRODUCTION: HOW DID WE GET HERE?

Voters in Veracruz and Puebla in the summer of 2018 may find themselves feeling *deja vu* at the ballot box. Two years ago, these two states elected governors, and they will do so yet again in 2018, a highly unusual occurrence in a country where gubernatorial terms of six years—*sexenios*—are the norm. While the cases of Veracruz and Puebla in 2018, and eventually Baja California in 2021, attract the most attention, a number of Mexican states have recently moved to bring their gubernatorial elections in line with federal presidential or midterm elections, whether enticed by the prospect of cost savings or (more recently) obligated to do so as a result of changes in federal electoral law.

For voters in the states where this transition is becoming a reality, the nature of the voting experience is changing. Previously, governors in half of Mexico's 32 federative entities were elected in state elections, held in separate years from the elections for president and Congress. Other state-level elections followed the same cycle: the local legislators, and sometimes mayors and municipal councils, were also elected at this time. This meant that in a given six-year period, a state would experience four elections: two to fill state and local offices (given that local deputies have three-year terms like their federal counterparts) and the two federal elections. In states like Veracruz, where municipal elections did not run on the same cycle, there might have been an election in even more calendar years; Veracruz voters went or will go to the polls in 2015, 2016, 2017 and 2018.

This work seeks to ask three major questions that spring from this outbreak of concurrence:

- What does making state gubernatorial elections concurrent mean for variation between federal and state election results?
- Do states that already have concurrent elections have less variation in election results?
- Do concurrent elections drive increased turnout from the perspective of the state election? the federal election?

In order to understand just why this is a salient question at this time, it is important to review the existing Mexican state-level electoral landscape and how a major reform in 2014 set off all of these changes.

The Catalyst: The Electoral Reform of 2014

Mexico has engaged in two comprehensive national electoral reforms in the last decade, in 2007 and 2014. However, it is primarily the latter that has resulted in a dramatic increase in concurrent elections. The 2014 electoral reforms, part of a series of reform packages put out in the early years of Enrique Peña Nieto's presidency and promulgated on February 10 of that year, were filled with major changes to the structure of electoral administration in Mexico. These changes can generally be described in several categories.

The first and most notable change on the landscape was the upgrade of the Federal Electoral Institute (IFE) to the National Electoral Institute (INE). With this name change came a substantial new role for the federal body in state elections. Not only does the INE now work collaboratively with the 32 state-level electoral bodies, the INE can

take over the organization of state elections when necessary to ensure public order, impartiality, or freedom from governmental intervention (known as the power of attraction); previously, this required the state electoral agencies (legally known as OPLEs, Organismos Públicos Locales Electorales) to petition the matter to be brought forth to the federal body. The INE also now controls the disbursement of federal funds to the state electoral agencies, giving it the power of the purse over the OPLEs, as well as the training of poll workers.

Another change spurred by the electoral reform that affects state-federal relations is the institution of the *casilla única* (unified polling place) model in all states, whereas previously it was only used in a handful. In many states with concurrent elections (but not those that had signed agreements with the IFE), it was necessary for voters to go to one place to cast their federal ballot and another to participate in the local elections. Beginning in 2015, all states with concurrent elections now have unified polling places for the federal and state elections; previously, this was not always the case. According to Lorenzo Córdova Vianello, who was the president of the INE at the time the 2015 *casilla única* plan was approved, the primary goal of the model is to standardize processes between the federal and state elections, and thusly between the INE and the OPLEs. Another objective is that by reducing the number of polling places, cost savings are generated by not requiring two sets of markers, tables, and other basic equipment, or of personnel required to man the polling places.

The homologation of process matters has been a primary objective of the INE since the 2014 electoral reform. In August 2017, for instance, the INE used the power of attraction in order to take over the process of setting the electoral calendar for the 30

states with local elections in 2018, which otherwise would have depended on each state's unique electoral legislation, collapsing 31 calendars into one.

Other important aspects of the 2014 electoral reform that were not explicitly about changing the relationship between state and federal election administration included the legalization of independent candidacies for all offices, including president; the ability for the INE to administer internal elections on behalf of political parties when the parties so desire; the increasing of the gender quota for women to 50 percent; provision for reelection of federal deputies and senators; and a system for challenging elections that allows the Electoral Tribunal (TEPJF) to annul elections under certain circumstances.

Of course, all of this activity in Mexico City required states to bring their local laws in line with the new federal legislation. Much as was the case with other federal reforms undertaken in policy areas such as criminal justice and human rights, the central government urged states to undertake the task without delay. In mid-June 2014, for instance, Miguel Ángel Osorio Chong, the Secretary of the Interior, urged states to pass the appropriate local legislation by the June 30 deadline.

In an era of general decentralization, and particularly in a country like Mexico where political centralization has long been the name of the game, the move away from decentralization would raise eyebrows in many policy areas. The move to a “semicentralized” model that strips some powers from the OPLEs and further gives the INE the ability to take on many matters that once were in the exclusive domain of the state electoral agencies, however, falls in line with the trends in electoral administration. In 2007, Germán Pérez Fernández del Castillo traced the changing practices of Mexican electoral administration. Prior to 1946, the elaboration of the voting rolls was done at the

municipal level, and the lone federal electoral authority was an electoral college that was constituted to approve the election of deputies and president. Important centralizations took place in 1946, with the creation of a national council to oversee the creation of the voting rolls for federal elections and the exclusion of municipal authority from the process, and in 1996, when reforms were passed which established public financing and equal media access for political parties; additionally, the Electoral Tribunal was given the power to revise new state electoral laws. The 2007 electoral reform further consolidated the federal government's monopoly on controlling access to broadcast media airtime during campaigns, preventing parties from buying airtime on their own, and allowing states to hand over the organization of their local elections to the IFE. Seen in this light, the centralizing reforms of 2014 continue the long-term trend. In fact, even former INE commissioners and presidents have proposed a total centralization of the electoral system in 2019.

One Small Clause, One Giant Leap

Despite all of the changes that accompanied the 2014 electoral reform, it was one additional element, a clause added to the Constitution, that set off an entire phenomenon with far larger impacts beyond a power of attraction, INE-run party elections and consolidated polling places. In Article 116 of the Constitution, clause N, section IV was added. This section reads as follows: "According to the guidelines in this Constitution and the general laws in this area, state constitutions and laws pertaining to elections shall guarantee that at least one local election is held on the same day as a federal election."

(See Appendix A for the original Spanish text.)

Not only would states need to build legal frameworks for independent candidacies, prepare for *casillas únicas* or force parties to run even numbers of women and men, many of them would also have to change the core rhythm of their political calendars by bringing forward elections to coincide with federal contests. Beyond process changes, this was the largest material change forced on states, and it is hard to overstate the sea change represented by this move. Between 1997 and 2012, only 34.8 percent of federal elections in each state featured a local race. In 2018 alone, all states except Baja California and Nayarit will have at least one local contest coinciding with the federal presidential election, and even those states will have concurrent elections in 2021.

Now, the ball was in the court of the state legislatures. While some states, like Nuevo León and Jalisco, were already conducting all of their local elections in the same years as federal elections, there were many more who were not.

Electoral Cohorts

To understand descriptively the scope of states affected, I must introduce an important concept: the idea of electoral cohorts, or groups of states that have typically elected their governors in the same year. Since both governors and presidents typically have six-year terms, two cohorts always line up with the federal elections that take place every three years. Table 1 shows the electoral cohorts in effect for 2012-17 and for 2018-23. The states in bold are holding their first elections in a new electoral cohort; this is the universe of cases of interest (both existing and eventual).

The electoral cohorts are labeled +0 through +5, representing the number of years after a presidential election in which a state's gubernatorial election is held. +0 is the year

of a presidential election, at which all federal offices are filled (President, Senate and Chamber of Deputies). +3 is the year of a midterm election, in which voters only elect federal deputies.

Table 1. Mexican Electoral Cohorts, 2012-17 and 2018-23

+0 <i>Pres.</i>	+1	+2	+3 <i>Midterm</i>	+4	+5
2012	2013	2014	2015	2016	2017
Chiapas	Baja		Baja	Aguascalientes	Coahuila
Distrito	California		California	Chihuahua	México
Federal			Sur	Durango	Nayarit
Guanajuato			Campeche	Hidalgo	
Jalisco			Colima	Oaxaca	
Morelos			Guerrero	Puebla	
Tabasco			Michoacán	Quintana Roo	
Yucatán			Nuevo León	Sinaloa	
			Querétaro	Tamaulipas	
			San Luis	Tlaxcala	
			Potosí	Veracruz	
			Sonora	Zacatecas	
2018	2019	2020	2021	2022	2023
Chiapas	Baja		Baja	Aguascalientes	Coahuila
Ciudad de México	California		California	Durango	México
Guanajuato			Baja	Hidalgo	
Jalisco			California Sur	Oaxaca	
Morelos			Chihuahua	Quintana Roo	
Puebla			Campeche	Tamaulipas	
Tabasco			Colima		
Veracruz			Guerrero		
Yucatán			Michoacán		
			Nayarit		
			Nuevo León		
			Querétaro		
			San Luis		
			Potosí		
			Sinaloa		
			Sonora		
			Tlaxcala		
			Zacatecas		

Note: Bolded states are holding their first election in a new cohort. The Distrito Federal became the Ciudad de México in 2016.

In the 2012-17 cycle, 16 of the 32 states held their gubernatorial elections in federal election years. Four of these were newly concurrent states thanks to actions taken at the state level: Yucatán, which had been +1 with its last gubernatorial race in 2007; and Baja California Sur, Guerrero and Michoacán, which had all elected governors in 2011, a +5 year. However, the year with the most gubernatorial contests was not a federal election year, 2016. For the next six-year period, that figure ascends to 24 states—including Baja California, which will go to the polls twice over three years—with eight newly concurrent states, and nearly half of those governors (15) will be elected in 2021.

State-Level Decisions, National Consequences?

It is also noteworthy that of the twelve newly concurrent states in this time period, nine opted to make their elections concurrent with the midterm races, while three decided to move their gubernatorial electoral cycle to correspond with the presidential elections.

There are several considerations, some of them related to rates of citizen participation and others dealing with the relative importance of local issues, the interaction of state and national political preferences.

Arguments for midterm concurrence. The normative consideration has to do with the differentiated effect of stacking additional elections on turnout. Since 2000, presidential elections have averaged a turnout of 61.8 percent, while the three midterm elections averaged 44.6 percent. Eggleton (2016) finds that the effect of concurrent races on turnout is more pronounced in midterm than in presidential years. Thus, a state wishing to stimulate citizen participation with concurrent elections is better served by making its gubernatorial (or more important) elections concurrent with the federal midterm races,

which benefit more from such a boost. In part, this is because midterms consistently lag the presidential election in turnout. Figure 2 shows the national turnout for federal elections between 1991 and 2015, separating midterm and presidential years from each other. Comparing the 2003 and 2009 midterms to the 2006 and 2012 presidential elections that succeeded them, the average turnout increase into the presidential races is greater than 17 percentage points. An example of this reasoning is Baja California; the PRI-PVEM coalition that proposed the state's move to +3 in 2021 did so saying that moving the gubernatorial race to the midterms would increase participation in those elections (Pringle 2014). Of course, either option is likely to increase turnout from the standpoint of the local contest. In Baja California, turnout for the 2010 midterm election was a paltry 32.77 percent, increasing to 40.08 percent for the 2013 gubernatorial race and sliding back down to 33 percent in 2016. After this current cycle, presidential years will serve as state midterm years; the national turnout figure of 63 percent in the 2012 presidential election nearly doubles the number of voters in the state midterm race in 2016. Similarly, moving the gubernatorial race to the midterm would result in an increase, albeit more modest, based on 2015 turnout figures.

Some considerations have to deal with the weight given to local issues. Cuauhtémoc Cardona Benavides, who was a PAN deputy in Baja California at the time electoral reform was adopted in that state, mentioned another reason to opt for midterm over presidential concurrence. In presidential years, according to Cardona Benavides, national issues determine the political game and drive media coverage, which would leave matters of local importance with a diminished role; additionally, in a northern border state like Baja California, “we see that national issues like the IVA [value-added

tax] are of little relevance to the reality on the border” (Pringle 2014). From this perspective, a midterm election allows local issues to be the protagonists without being overwhelmed in the national presidential campaign environment.

Another, equally political consideration comes from Nayarit, where one columnist noted that for the PRI, the incumbent party in the state at the time of passing electoral reform, tying the gubernatorial election to the presidential race was not convenient for the party as it would have been dragged down by its national reputation; additionally, he pointed to the 2006 election, where Andrés Manuel López Obrador carried Nayarit despite there being very few *perredistas* in the state (Martínez Sánchez 2016).

Arguments for and against presidential concurrence. Arguments in favor of presidential-coinciding gubernatorial terms include the ability to develop closer relationships with a coterminous federal government, as one state legislator pointed out with his unusual proposal to move Nuevo León from midterm to presidential concurrence (García 2017). However, these have largely been outweighed by arguments against such a move. One reason has to do with the situation many nonconcurrent states were in: a +4 cohort requiring a two-year *gubernatura corta* to achieve presidential concurrence versus a more conventionally sized five-year term and midterm concurrence. Arteaga (2016) points out that the ability of governors to fulfill campaign promises in just two years varies. As an example, she looked at campaign promises made by the previous six-year governors of Veracruz (Javier Duarte) and Puebla (Rafael Moreno Valle). Duarte was able to get immunity for legislators and public officials removed within seven months, but it took him four years to get around to abolishing Veracruz’s land tax; Moreno Valle was able to build a new building for Puebla’s attorney general’s office in just 14 months after the

previous one was condemned, but an unfinished health center project inherited from the last administration lingered for five years.

No short-changing incumbents. Another concern is that no state has modified the term of office of an incumbent governor, state legislature, or municipal president in order to achieve concurrence. This can result in unnecessarily long lead times between the approval of an electoral reform and the first concurrent election. The term of office of the incumbents is treated as a given, and when a reform is passed early in the term of a new state administration, for instance, it can sometimes be up to a decade. In Michoacán, the electoral reform that gave the state concurrent gubernatorial elections only took effect in the latter regard in 2015, eight years after it was approved by the legislature. Of the eight states that will remain non-concurrent with their governors in the next presidential *sexenio*, two of them have laws on the docket to move their elections. These are Aguascalientes and Quintana Roo, which both will hold their first concurrent gubernatorial elections in 2027. Had these states opted to modify the term of office of the incumbent governor, they could have been concurrent six years sooner, but since they sought to move to a midterm year and the incumbent's term of office ends in 2022, they will not have a governor with a shorter term of office until then, and the effects of concurrence are still nearly a decade away. Puebla's 2018 gubernatorial concurrence also is worth mentioning as being years in the making. It was approved in July 2011, before the passage of the electoral reforms of 2014.

Not Always the Governor

A close reading of Clause N, Section IV serves as a reminder that states did not need to necessarily move their *gubernatorial* elections: indeed, it was sufficient to move one local election to the federal election cycle. In total, eight states will not have gone to concurrent gubernatorial elections by 2024. These states either already had another election concurrent with the federal cycle or moved another contest; for instance, in Tamaulipas, Coahuila and Quintana Roo, the mayoral elections were chosen to be made concurrent, while the state legislatures in Aguascalientes, Durango and Hidalgo will come up for election in 2018 instead of 2016. Oaxaca opted to make both mayors and the legislature concurrent, but not the governor. Tamaulipas ultimately opted to take the Puebla and Veracruz route and institute a *gubernatura corta* that will run from 2022 to 2024. The eighth and final state with a nonconcurrent gubernatorial race, the State of Mexico (+5), already concurrently elects its mayors and legislature and thus did not need to take action. When Tamaulipas considered a *gubernatura corta* from 2016 to 2018, deputies from across the party system said that a 21-month term “wouldn’t give [the new governor] enough time to form a cabinet” and that the state was best served not having an interruption in *sexenios* (Rosas H. 2015).

Now with an understanding of the state-level electoral context in Mexico, it is now possible to move forward to discussing what happens when elections become concurrent.

CHAPTER 2

LITERATURE REVIEW AND HYPOTHESES

The literature on concurrent election is surprisingly scarce with regard to cases like this one that *create* concurrence, but it offers a few clues as to the phenomena that have occurred with concurrent elections. There is little work to date on the timing of elections in Mexico, despite the existence of multiple electoral cohorts and the recent shift toward concurrence with the federal midterm or presidential elections.

There are several intuitive reasons why concurrent elections might be expected to display different behavior than nonconcurrent races. The first is the effect of time: concurrence eliminates the one- or two-year period between the last federal election and the gubernatorial contest, and all of these elections are required to happen on the same day (not just in the same year) as the federal race. This logically eliminates the political events, system shocks, or other changes that can affect a voter's choice in the interim period by eliminating it altogether. Additionally, the *casilla única* is in use in all states, ensuring that voters do not need to travel between polling places to vote at multiple levels of elections.

Sea change. Over time, or after a particularly disastrous state administration, voters can switch their gubernatorial allegiance en masse, even in a short time span from supporting the same party in other elections. As attested in the data set, Héctor Yunes Landa, the gubernatorial candidate for the PRI in Veracruz in 2016, lagged his coalition partners' deputies' performance from just a year ago by a whopping eight percentage points. However, for anyone familiar with mid-2010s Veracruz government, this should not be surprising. The PRI had a no good, horrible, very bad year there, which was capped by

Governor Javier Duarte becoming a fugitive, his resignation, and the appointment of an interim governor to serve the final 48 days of his term in office. The following state administration was the first to introduce *alternancia* to Veracruz in the modern era. As will be mentioned later, this was far from the largest swing experienced in the last three years.

Sometimes, aspiring candidates shunned by their state party's leadership also can switch parties, and one candidate's change of banner has so far proven decisive in the political history of one state. That candidate is Marcos Covarrubias Villaseñor, who jumped from the PRD to the PAN upon the former's rejection of him as its gubernatorial candidate in 2011. The PRD controlled all five of the state's municipalities, the governor's palace and 14 of the 16 district seats in the state legislature entering that election. On election night, it only managed to win two mayoral races and three proportional representation posts. In the gubernatorial race, the PAN won on the back of a tremendous 24-percentage-point vote swing, proving that Covarrubias was able to take many of the PRD's former voters with him; the party went on to win gubernatorial reelection four years later, while Baja California Sur went for the PAN slate of PR deputies in 2012 and 2015.

These sorts of sea change events should be expected to appear far less in a concurrent context. Any major shift should register both on the federal level and on the state level, and not merely on one.

Nationalized party environment, local party machine? Mexico's political party system is highly structured at the national level. State parties do exist in many of Mexico's 32 federative entities, but they largely offer little additional weight, especially when the

winner-take-all gubernatorial race is considered. In many cases in the expanded sample, they backed candidates run by the larger federal parties, and when they did not, they often drew very small percentages of the gubernatorial vote.

This is not news to scholars of Mexican politics, but it is an important consideration in that Mexico departs in this way from countries that have typically driven studies of congruence voting in the literature. Studies like Jeffrey and Hough (2009) on elections in Scotland and Wales, Johnston's pioneering work in the differentiated arenas of Canadian politics, or Pallarés and Keating (2003) in Spain's autonomous communities, serve to bring into comparative perspective the nationalized nature of the field of contenders in Mexico. Mexican multi-level electoral competition is not about fundamentally different actors at each level. Partisan cues, therefore, can and will be shared by voters across multiple races when they are being decided at the same time.

By reducing the intervening period between these elections, when sea change and political shocks can occur, and by holding them on the same date in the same place, fewer environmental variables come to bear on the gap between federal and state electoral results.

H1. The similarity of federal and state electoral results should increase with concurrence.

One of the few works that has analyzed transitions to or from concurrent elections is Nikolenyi (2010), which addresses a situation in which national- and state-level legislative elections came unmoored from each other in India in 1971. Nikolenyi argues

that the creation of separate legislative cycles for these elections not only caused regional and state parties to become viable but also reduced turnout for state elections in those cases where elections were not concurrent, because voters had less incentive to vote when second-order contests were unbundled from first-order ones. The process Nikolenyi describes is in many ways the inverse of what is happening in Mexico; in the Indian case, most state legislative elections became nonconcurrent but a few continue to be held at the same time as the federal legislative election, while in Mexico, most gubernatorial elections are now or soon will be concurrent with a few exceptions.

There also is existing literature suggesting that in both presidential and midterm elections, concurrence, especially *complete* concurrence of all local races, raises turnout. Ávila Eggleton (2016) finds that in the 2009 midterm elections, for instance, turnout was slightly below 40 percent in states with nonconcurrent elections, 47 percent in those with incomplete concurrence, and 56 percent in those with complete concurrence. The trend holds for the midterm and presidential elections from 1997 to 2012, and it actually became more powerful as time went on. The turnout gap between states with incomplete concurrence and those with complete concurrence in 1997 was 2.82 percentage points and 4.97 percentage points in 2003; in 2009, this jumped to 9.26 percentage points. Ávila Eggleton also finds that concurrence does more to boost turnout at federal midterm elections than it does for presidential races.

She also notes that gubernatorial elections are “the most potent driver of participation in concurrent elections”. This survey only analyzes states where concurrence includes gubernatorial races, but Ávila Eggleton’s analysis takes in a wider view, comparing the 2013 contests in Baja California, Hidalgo and Quintana Roo, and

finding that the former had a smaller drop in turnout than the other two because, unlike those two states, Baja California elected its governor that year. The suggestion is that gubernatorial races could increase the turnout of federal elections, particularly midterm ones, upon concurrence. While there is also concurrence (old and new) in other types of state elections, such as for municipalities and the state legislature, this work focuses on governors not only because of their role as turnout drivers but also because governors and gubernatorial candidacies attract more attention than either of the other elected offices at the state level. Outside of presidential years, gubernatorial coalitions and related imperatives often structure the contours of an election, including at federal midterm years.

Other types of second-order elections benefit from concurrence with a higher-order election, namely the presidential race. Fornos et al. (2004) finds that turnout in legislative elections is 5% higher in Latin American countries when presidential elections are held alongside them. Ávila Eggleton's turnout analysis and the replication of the two-tiered electoral cycle at the state level in a nonconcurrent state like Baja California demonstrate that gubernatorial races may be higher-order than everything except the presidency. Other countries show surprising degrees of order in their gubernatorial races, as seen by Samuels (2006)'s investigation of coattails in Brazil that found gubernatorial, not presidential, coattails were of importance because governors controlled critical campaign resources. The benefit of combining federal legislative and state gubernatorial elections—especially without the presidency, which is to say at a midterm election—may be mutual; the federal election may improve gubernatorial turnout, and the gubernatorial election may result in an increase in turnout compared to pre-concurrent federal turnout.

Magar (2012), which finds that gubernatorial coattails flow rather strongly toward federal legislators, points out another reason that gubernatorial elections may carry a higher order in Mexico, though notably one that beginning in 2018 may not always be the case: the single-term limit in the federal and state legislatures. A constantly new cohort of legislators will have little individual power. A governor running for office, however, will be a higher political priority and garner more attention, particularly in a midterm, than the candidates for deputy. The concept could be extended to state-level drives to turn out the vote, in which state-level agents drive voters to the polls, doing so primarily for the gubernatorial race but increasing turnout for the other concurrent elections at the same time.

Since turnout has gone down in the newly nonconcurrent cases of India, and given the existing literature comparing concurrent and nonconcurrent elections in recent Mexican history, the opposite may be true for Mexico and its newly concurrent cases.

H2. Turnout should be higher in concurrent, federal-and-state elections compared to nonconcurrent elections, both state and federal.

CHAPTER 3

METHODOLOGY

For the presentation of newly concurrent states, each state's gubernatorial elections are presented and compared with the state-level results of what was at that time the most recent election for proportional representation federal deputies. For all federal elections, as well as many state elections in 2015 or later, this data is collected directly from the National Electoral Institute (INE) by way of the *Atlas de Resultados Electorales Federales 1991-2015*. The INE (formerly IFE) did not directly administer any state elections prior to 2015, and so for these elections, data has been gathered from the OPLEs.

When voters cast their ballots for the Chamber of Deputies, they get two votes. One vote is for the candidate representing their district. Parties run in coalitions and often divvy up the seats available nationwide or in a given state among coalition partners. There are 300 single-member electoral districts in total. The use of electoral coalitions presents the potential for serious methodological issues that would arise when coalitions are not the same across elections or between the state and federal level. It must be possible to assign parties to their gubernatorial coalitions exactly, even when parties run candidates with different coalition partners in different states. Additionally, candidates can possess varying levels of attractiveness to the electorate compared to the party they represent. What's more, some of the states in the universe of cases are large, with as many as 20 electoral districts, posing a scalability problem for research.

The second vote is for a party. The remaining 200 deputies are elected out of five large electoral regions, 40 deputies apiece, using closed lists. Not only are candidates far less prominent, but the vote is for a party, and this vote is rarely susceptible to the formation of coalitions. Additionally, state-level data on proportional representation deputy results is available directly from the INE, facilitating research. While the legislators are allocated out of large regions, more detailed vote splits are available not only at the state level—allowing for comparison with the state-level gubernatorial results—and the federal electoral district level from the INE.

While in 2006 (one of the two legislative elections covered in the sample for Yucatán), 2003 and 2000, some coalitions did present common lists, they do not do so now. Today, parties consistently enter into *partial* coalitions ahead of elections. The primary reason for this is to allow the parties to qualify separately, and not as one unit, for the broadcasting airtime allocated by the INE, which means they receive more time. In 2018, for instance, Por México al Frente registered as a partial coalition, covering the presidency, all 64 Senate candidacies, and 299 of the 300 districts in the Chamber of Deputies. For this coalition, it was worth leaving one district out of the agreement as a formality in order to maintain parity with the other parties in the allocation of broadcasting airtime. Since the other two major electoral blocs also entered into partial coalitions, and airtime for political messaging is so valuable and its distribution monopolized by the INE, entering into a total coalition would have put any of the blocs at a serious competitive disadvantage.

We also confront a universe of cases that predominantly has chosen federal midterm elections as the concurrent set to their gubernatorial contests (Yucatán in 2012 is

an exception, as are Veracruz and Puebla beginning in 2018). As a result, it is not possible to use presidential results or, for the same reason, Senate results, as the upper chamber of the legislature is elected every six years alongside the president. This is a comparison for which Mexico is well suited; in fact, it has not been seen often simply because this sort of comparison is extremely difficult to pull off in many political systems. Not only does the legislature need to incorporate proportional representation, but the political system also needs to have some concurrent and some nonconcurrent state elections. Brazil meets the former requirement, but all of its governors are elected simultaneously; Nikolenyi's India study has the latter but in an entirely first-past-the-post environment.

Before being calculated, to provide an even comparison, the percentage totals for proportional representation deputies are aggregated by state-level gubernatorial coalitions; this means that if the PRI, PVEM and Nueva Alianza were in coalition at the state level, their percentages will be added in the corresponding Chamber of Deputies election for purposes of comparison. Additionally, where there are multiple candidacies exclusively backed by state-level parties or run by independents, these are collapsed and reported as "non-federal party" candidacies. Because this comparison is being made to proportional representation deputy results, and voters *must* select a party, there is no way to map these votes onto the federal party system. (Currently, no states in the sample have more than one of these.)

Throughout this paper, in illustrations, color coding is used. Since the PAN, PRI and PRD always ran their own candidates (at least in the cases of the restricted sample),

their coalitions are color-coded accordingly: blue, green, and yellow, respectively. In cases where parties ran alone or outside those three coalitions, their colors are used.

Addressing Selection Bias in the Restricted Sample

Four of the five states that enacted their own concurrence-creating electoral reforms prior to the 2014 constitutional reform are also the only four states with data available at the present time that form the restricted sample. (Puebla's concurrence begins in 2018 but was passed in 2011.) This presents obvious considerations given that the states are essentially self-selectors. (This will eventually be less of a concern as the states that moved their elections to the 2018 and 2021 cycles become part of the data set.)

The states of interest all enacted their electoral reforms between 2006 and 2010. Baja California Sur, Guerrero and Michoacán all had PRD governors at the time of the enactment of reform, while the PAN held sway in Yucatán. While political considerations may have sparked the passage of this legislation in these states, by the time of the first concurrent elections, the same parties were only in power in Guerrero and Michoacán, as intervening gubernatorial elections brought the PAN to power in Baja California Sur and returned the PRI to the governor's palace in Yucatán. Furthermore, in Guerrero, the first concurrent election saw the PRD lose control of the state, though near-term political circumstances were decisive in that election. Only in Michoacán did the same party that proposed concurrence-making electoral reform manage to reap its reward when it came time to elect a new governor.

The national electoral and political environment in the 2006-10 period when these states adopted reform was one that broadly benefited the PAN and PRD. The PAN was in

Los Pinos throughout the period, while the PAN and PRD were the two largest parties in the Chamber of Deputies for the LX Legislature (2006-2009). It thus makes sense that no PRI-dominant state enacted gubernatorial electoral concurrence at this time; it would have been bad politics. For similar reasons, many of the moves to gubernatorial concurrence enacted in the wake of the 2014 constitutional reform were enacted by PRI governments (with the notable exceptions of Baja California and Sinaloa), though not all PRI-ruled states took part. However, the still more recent reforms in Aguascalientes, Quintana Roo and Tamaulipas took place under PAN governors. While the governing party that made the initial decision probably would have stood to benefit from it in the short term, it is no certainty that they can actually profit from the reform on the gubernatorial front, especially with lead times of five years or longer for the change to be felt.

Another potential problem with self-selection is that the states that took action might not look like the country in other ways. In the case of human development as measured in the Human Development Index, the sample does happen to include a little bit of everything. Of the four states, one is in the national top five (Baja California Sur), another squarely in middle of the pack (Yucatán), and two in the bottom five (Michoacán and Guerrero). Considering that additional states will be in this population after 2018 and especially 2021, the sample will begin to look more like Mexico as a whole simply because it features more states. This is already the case with the expanded sample, which features the most recent election in every state.

Measuring Congruence

The standard measure of congruence, or lack thereof, across two elections, is the dissimilarity index (DIS), pioneered by Johnston (1980) (see Schakel, 2013). It consists of the sum of the absolute value of the differences in vote share between the two elections for each party/coalition, divided by two to avoid double counting.

DIS is a nondirectional average, and since it is the sum of positive numbers divided by a positive number, it is always positive. Election vote percentages are zero-sum; if the summation did not specify an absolute value, most figures would be near zero even with large shifts between parties. DIS measures distance, not sign. Party-level DVS *is* reported with a sign; a positive DVS indicates that the party (or parties) performed better in the gubernatorial election than in the election for PR deputies, while a negative DVS says the opposite is true.

Additionally, these measurements always depend on a *pair* of elections. In effect, this work seeks to compare two types of paired elections. The number of observations for each of the states of focus is two: one nonconcurrent observation and one concurrent observation.

The Expanded Sample

In addition to the eight cases in the restricted sample, I assembled an expanded sample that consists of 183 candidates over 36 elections, including one election for every Mexican state between 2012 and 2017, as well as the four elections prior to 2012 covered in this work. This sample allows for a wider comparison of activity in states whose elections were not newly concurrent in the preceding electoral cycle, such as Baja

California and Hidalgo, or for states who already held concurrent gubernatorial elections, like Guanajuato (in a presidential year) and Campeche (in a midterm year). For Colima, the sample uses the nonconcurrent special election that was called after the TEPJF nullified the normally held, concurrent gubernatorial race, and codes it as nonconcurrent.

This dataset is available as two CSV files, one with 183 candidate observations and another with the 36 election observations. For each candidate/party pairing, the gubernatorial and deputy vote shares and DVS are provided. There are also six dummy variables: **winner** indicates that the candidate won the election, **newconc** indicates the first election after concurrence reform, **gccase** indicates it is one of the eight cases in the restricted sample, and **conc** is 1 if either of **prescon** (presidential concurrence) or **midcon** (midterm concurrence) is 1.

For each election, all of the dummy variables except **winner** are specified, as well as the dissimilarity index **DIS** and two specifications of similar measures sensitive to changes in the field of candidates.

CHAPTER 4






DATA

Yucatán

Yucatán was the earliest of the states to fully come into line, doing so with the 2012 election cycle. It is the only pre-2018 case of a movement to presidential concurrence. The change was part of a sweeping electoral reform in 2006 that reorganized Yucatán’s electoral administration, opened the door to independent candidacies (years before the rest of the country), and allowed for referenda to be held in the state.

In 2007, Yucatán held its last non-concurrent gubernatorial elections:

Table 2. Yucatán Nonconcurrent Election Pair, 2007-2006 (DIS = 13.44)

2007 Gubernatorial Elections		2006 PR Deputy Elections	
Candidate/Parties	Vote %	Vote %	Party DVS (%)
Xavier Abreu Sierra (PAN, Nueva Alianza)	42.46	 48.24	-5.78
Ivonne Ortega Pacheco (PRI, PVEM, PAY*)	49.92	 35.99	13.93
Héctor Herrera Álvarez (PRD)	2.66	 12.07	-6.20
Ana Rosa Payán (PT, CON)	3.21	 1.12	-0.97
Jorge Lizcano Esperón (PASD)	0.15	 1.12	-0.97

A methodological note must be made here. Unlike the partial electoral coalitions currently favored by parties in Mexico, the PRI-PVEM “Alianza por México” and the PRD-PT-CON “Por el Bien de Todos” coalitions in 2006 were total and covered proportional representation deputies. While the former lines up with the PRI-PVEM coalition that ran in the state gubernatorial election a year later, the PRD ran its own

candidate in 2007. For the purposes of calculating ADVS, the vote shares of Héctor Herrera Álvarez and Ana Rosa Payán were combined.

The 2012 election continued Yucatán’s trend toward two effective parties:

Table 2. Yucatán Concurrent Election Pair, 2015 (DIS = 5.49)

2012 Gubernatorial Elections		2012 PR Deputy Elections	
Candidate/Parties	Vote %	Vote %	Party DVS (%)
Joaquín Díaz Mena (PAN)	41.07	40.00	1.07
Rolando Zapata Bello (PRI, PVEM, PSDY*)	50.81	45.99	4.82
Eric Eber Villanueva Mukul (PRD, PT, MC)	5.38	9.43	-4.05
Olivia Guzmán Durán (Nueva Alianza)	0.86	1.89	-1.03

It is worth noting that there were several changes in the makeup of the state-level electoral coalitions from 2007 to 2012. Removing the state PSDY party from the latter, the alignment of parties in the 2012 gubernatorial election is an exact match for the presidential election, whereas the same could not be said of the 2007 gubernatorial election relative to the preceding presidential election.

Baja California Sur

Baja California Sur is Mexico’s least dense state, and very close to being its least populous. In 2010, the state legislature of Baja California Sur approved a modified electoral law that stipulated that the governor chosen at the next election, in 2011, would serve for four years, with six-year terms resuming in 2015.

In the 2011 gubernatorial election, five candidates ran for office, though the Convergencia candidate ended up dropping out.

Table 4. Baja California Sur Nonconcurrent Election Pair, 2011-2009 (DIS = 26.79)

2011 Gubernatorial Elections		2009 PR Deputy Elections	
Candidate/Parties	Vote %	Vote %	Party DVS (%)
Marcos Alberto Covarrubias Villaseñor (PAN, PRS*)	40.09	15.92	24.17
Ricardo Barroso Agramont (PRI, PVEM)	33.59	28.83	4.76
Luis Armando Díaz (PRD, PT)	21.58	38.97	-17.39
Martín Inzunza Tamayo* (Convergencia)	0.50	1.43	-0.93
Blanca Meza Torres (Nueva Alianza)	1.66	7.99	-6.33

The PAN won comfortably in the 2015 election, with the PRD falling to an even more distant third-place:

Table 5. Baja California Sur Concurrent Election Pair, 2015 (DIS = 6.96)

2015 Gubernatorial Elections		2015 PR Deputy Elections	
Candidate/Parties	Vote %	Vote %	Party DVS (%)
Carlos Mendoza Davis (PAN, PRS*)	44.77	40.78	3.99
Ricardo Barroso Agramont (PRI, PVEM, PANAL)	35.21	29.08	6.13
Jesús Druk González (PRD, PT, MC)	8.56	12.23	-3.67
Víctor Manuel Castro Cosío (Morena)	6.41	6.28	0.13
Independent candidate	1.77		

Guerrero

After Zeferino Torreblanca separated the gubernatorial election from other local contests in a bid to weaken the opposition, Guerrero passed a reform in 2009 that moved

the state from +5 to +3. Its last +5 election, in 2011, saw the PAN candidate bow out in the final week:

Table 6. Guerrero Nonconcurrent Election Pair, 2011-2009 (DIS = 15.78)

2011 Gubernatorial Elections		2009 PR Deputy Elections	
Candidate/Parties	Vote %	Vote %	Party DVS (%)
Marcos Efrén Parra Gómez* (PAN)	1.34	10.28	-8.94
Manuel Añorve Baños (PRI, PVEM, Nueva Alianza)	42.69	47.06	-4.37
Ángel Aguirre Rivero (PRD, PT, CON)	55.97	37.72	18.25

It is worth noting that the PAN candidate, when he left the race, endorsed Aguirre Rivero; if the PAN is considered to have been in coalition with the PRD and other parties, the DIS drops to 6.84.

Between the 2011 and 2015 elections, in the aftermath of the Ayotzinapa massacre in September 2014, the office of Governor of Guerrero turned into a revolving door. Ángel Aguirre Rivero stepped down a month later, naming Salvador Rogelio Ortega Martínez his successor for a six-month period. After a three-day interregnum at the end of the period, the state legislature retained Ortega Martínez for another six-month term before the new governor elected in 2015 was sworn in.

Given the situation, it should not be surprising that the 2015 election looked markedly different from its predecessor. The PRI returned to the governor's office in Guerrero. Additionally, the number of gubernatorial candidates tripled, not only due to the creation of new parties but also as a consequence of existing parties moving out of prior coalitions.

Table 7. Guerrero Concurrent Election Pair, 2015 (DIS = 4.25)

2015 Gubernatorial Elections		2015 PR Deputy Elections	
Candidate/Parties	Vote %	Vote %	Party DVS (%)
Jorge Camacho Peñaloza (PAN)	4.89	5.67	-0.78
Héctor Astudillo Flores (PRI, PVEM)	40.94	38.56	2.38
Beatriz Mojica Morga (PRD, PT)	34.72	33.11	1.61
Luis Walton Aburto (Movimiento Ciudadano)	8.01	7.73	0.28
Karime Sevilla (Nueva Alianza)	1.77	2.43	-0.66
Pablo Amílcar Sandoval (Morena)	2.77	3.88	-1.11
Alberto López Rosas (Partido Humanista)	0.83	1.79	-0.96
Raymundo Noguera Analco (Encuentro Social)	0.65	1.37	-0.72
Godeleva Rodríguez Salmerón (PPG*)	0.93		

Michoacán

Michoacán’s electoral reform was approved in early 2007 and involved a shift from +1 to +3. In order to avoid an undesirable, eight-year-long term, an extra election was inserted late in 2011, a +5 year, and voters returned to the polls in 2015 to elect a new governor to a six-year term.

The 2011 election, therefore, put a governor in office for 31 months:

Table 8. Michoacán Nonconcurrent Election Pair, 2011-2009 (DIS = 5.83)

2011 Gubernatorial Elections		2009 PR Deputy Elections	
Candidate/Parties	Vote %	Vote %	Party DVS (%)
Luisa María Calderón Hinojosa (PAN, Nueva Alianza)	32.63	26.53	6.10
Fausto Vallejo Figueroa (PRI, PVEM)	35.44	33.51	1.93
Silvano Aureoles Conejo (PRD, PT, MC)	28.81	32.44	-3.63

The 2015 election took place after Fausto Vallejo stepped down for health reasons and also featured a much larger field of candidates:

Table 9. Michoacán Concurrent Election Pair, 2015 (DIS = 8.38)

2015 Gubernatorial Elections		2015 PR Deputy Elections	
Candidate/Parties	Vote %	Vote %	Party DVS (%)
Luisa María Calderón Hinojosa (PAN)	23.84	17.52	6.32
Ascensión Orihuela Bárcenas (PRI, PVEM)	27.83	33.36	-5.53
Silvano Aureoles Conejo (PRD, PT, PANAL, PES)	36.17	33.53	2.64
Manuel Antúñez Oviedo (Movimiento Ciudadano)	3.27	4.17	-0.90
María de la Luz Núñez Ramos (Morena)	3.83	4.80	-0.97
Gerardo Dueñas Bedolla (Partido Humanista)	1.18	1.57	-0.39

CHAPTER 5

RESULTS AND ANALYSIS

The Restricted Sample

[Figure 1 about here]

Figure 1 presents the declines in dissimilarity index (DIS) for each of our four sample states.

Three of the four states in the restricted sample decreased their DIS—which is to say, achieved increased congruence between gubernatorial and PR deputy results—upon concurrence. Guerrero’s 2015 election is particularly astounding in its concurrence; while the drop would be slightly lower taking into account the PAN candidate’s withdrawal, it still achieved the lowest DIS in the set. Even with a field of eight candidates, only two parties had a party-level DVS larger than 1.2.

However, increased congruence was not seen everywhere. This outlier case is Michoacán, which had by far the lowest DIS among the nonconcurrent elections at 5.83. All of the other states had DIS indices of 13 or greater, signifying a high level of variation between gubernatorial and PR deputy elections. (Baja California Sur’s 2011 election takes the cake with an extraordinary DIS of 26.79.) Michoacán’s 2015 election had a DIS of 8.38.

In the concurrent elections, all of the DIS figures sat between 4 and 8.5; Baja California Sur posted the largest drop, with similar declines in Yucatán and Guerrero and the aforementioned increase in Michoacán.

The Expanded Sample

The expanded sample includes 36 gubernatorial elections: 21 nonconcurrent and 15 concurrent, split almost evenly between presidential and midterm concurrence. Nuevo León in 2015, which is an outlier because its winner does not map onto the federal party system, is excluded from the analysis here. Figure 2 shows the difference between nonconcurrent and concurrent elections and presidential and midterm concurrent elections, respectively.

[Figure 2 about here]

The mean DIS score of the 20 nonconcurrent elections in the sample is 16.55, while the 15 concurrent elections produce a mean of 9.42. Even more striking is the distribution of these scores. Of the 13 cases with dissimilarity indices less than 10, nine were concurrent, but only five of the 22 cases of $DIS > 10$ were concurrent.

Another H1 supposition is confirmed by the near-total lack of incidences of sea change, operationalized as a DIS greater than 20, among the concurrent elections. The lone concurrent race to qualify was Morelos in 2012, with a DIS of 20.67. 20 is within the interquartile range of the nonconcurrent observations.

Splitting the seven presidential and seven midterm concurrence cases reveals something else: midterm concurrence is far closer than presidential concurrence. The seven presidential cases have an average DIS of 12.62. The seven midterm cases average 6.22 (8.46 if Nuevo León is included, demonstrating how it would have weakened the findings). The second box plot in Figure A demonstrates the large gap between those states with presidential concurrence (such as Yucatán in the restricted sample) and those with midterm concurrence (including Baja California Sur, Guerrero and Michoacán). The

top range of midterm concurrence barely clips the interquartile range of presidential concurrence, and the interquartile range of the presidential concurrence cases is very large.

Did Turnout Rise?

To calculate turnout, data was obtained from the state electoral agencies where applicable, and the INE where available, and incorporated into Table 10. Null votes are included. Turnout at the state level is calculated based on the gubernatorial race.

Table 10. Comparison of Gubernatorial Turnout Percentage in Restricted Sample

	Nonconcurrent	Concurrent	Difference
Yucatán (2007, 2012)	69.76	76.94	7.18
BCS (2011, 2015)	59.60	53.01	-6.59
Guerrero (2011, 2015)	50.42	56.78	6.36
Michoacán (2011, 2015)	54.44	54.54	0.10

Yucatán, typically among the states with the highest turnout, still managed to post a seven-percentage-point increase in turnout from 2007 to 2012. This is the highest leap in the sample. Guerrero also posted a substantial increase of six percentage points between 2011 and 2015. However, not all states had magnitude or even the correct sign. The needle barely moved in Michoacán, and in Baja California Sur, turnout slid by six and a half percentage points. Clearly the evidence is mixed on if concurrence stimulates turnout for the gubernatorial race.

However, combining elections may be more noteworthy for its impact on the federal election than on the principal state race. I repeat the calculations with proportional representation federal deputies in the last like election (midterm to midterm, presidential to presidential).

Table 11. Comparison of PR Deputy Turnout Percentage in Restricted Sample

	Nonconcurrent	Concurrent	Difference
Yucatán (2006, 2012)	66.48	77.53	11.05
BCS (2009, 2015)	34.47	52.62	18.15
Guerrero (2009, 2015)	32.66	56.36	23.70
Michoacán (2009, 2015)	33.37	54.88	21.51

Figure 8. Comparison of PR deputy turnout in concurrent elections under study

compared to previous like election

Figure 8 tells the real story behind this entire exercise. While turnout in gubernatorial elections does not display consistent behavior, at least with the sample available, turnout in proportional representation deputies from a nonconcurrent, federal-only election (2006 in Yucatán, 2009 in the other states) to a like concurrent election (2012 and 2015, respectively) jumped. Even Yucatán, which as a state now in +0 was being compared to a presidential election and came in with 66.48 percent turnout, posted a double-digit increase. The jumps were more staggering in the three states that moved to midterm years. In 2009, they posted turnout for federal deputies between 32 and 34 percent; six years later, with a governor's race also on the ballot, the states posted massive increases of 18 to 23 percentage points. This is congruent with Ávila Eggleton's observation that concurrence is more powerful when elections are moved to the midterm than when they are moved to the presidential year. These jumps are also significantly higher than the national increases in turnout seen between 2009 and 2015 (2.96 percentage points) and between 2006 and 2012 (4.53 percentage points). H2, therefore, is not quite supported in its original form, but turnout does indeed rise, sometimes significantly, from the perspective of the federal election when local races are

incorporated. It remains to be seen how the presence of additional data points will impact the findings.

Explaining the Outlier: Michoacán

Michoacán, unlike the other three states in the restricted sample, posted an increase in DIS. An examination of the DIS components reveals the primary reason why. Of parties that received 15% or more of the vote at any time in a concurrent election in the restricted sample, the PRI in Michoacán in 2015 was the only party to have a negative party DVS; that is to say, it was the only large gubernatorial candidacy that underperformed its own federal deputies. This underperformance of more than five and a half percentage points was critical in the context of the race. Had the DVS been more typical of a large political party, the PRI may well have won the election, and Ascensión Orihuela Bárcenas could have become the governor of Michoacán. Indeed, only 17 hundredths of a percentage point separated the PRI- and PRD-led blocs in the deputy election, while Silvano Aureoles won with a comfortable 8-percentage-point margin. What could have caused such a serious lag between the PRI gubernatorial candidate and the PRI (and PVEM) candidates for deputy?

The answer in Michoacán seems to lie in reporting from Yuriria Sierra of *Excélsior*. According to Sierra's report, Orihuela Bárcenas was being investigated by the United States Department of the Treasury for money laundering allegations to the tune of (US) \$4 million, and he had other connections to organized crime in a state that at the time faced a serious security challenge. With such accusations front and center just days before the election, it is fairly easy to see why Orihuela Bárcenas's support lagged his

own party. Candidates can outperform or underperform their party, but it is so unusual to see a large political party or party bloc perform so poorly with a gubernatorial candidacy when most large-party tickets outperform their PR deputies in a concurrent context.

Excluding Nuevo León, there were just three cases of worse concurrent underperformance in the expanded sample: two cases at around the same 5-6% level as Orihuela Bárcenas, and Fernando Guzmán Pérez Peláez, the PAN standard-bearer in Jalisco in 2012, who lagged his party's deputies by nearly 10 percentage points.

More Movement or Less?

The plots of Figures 3 and 4 compare the percentage of the gubernatorial vote earned by each of the 37 candidates in the restricted sample and the 183 candidates in the expanded sample with their party-level DVS.

[Figures 3 and 4 about here]

In general, concurrent elections bring with them less of a gap between gubernatorial and deputy candidates—a reduced amplitude. Generally, positive DVS levels have belonged to larger parties, and in nonconcurrent elections. Of the 29 observations in the expanded sample where the DVS was greater than 10 or less than negative 10, just six came from concurrent elections. All of the observations less than -10 were from the anomaly Nuevo León, while the three observations greater than 10 belonged to candidates running in party heartlands: Manuel Velasco Coello in the PVEM stronghold of Chiapas, Miguel Ángel Mancera in PRD-dominated Mexico City, and Enrique Alfaro in Jalisco, Movimiento Ciudadano's bread-and-butter state.

Small parties. In both samples, there is a strong clustering of observations around vote shares of 0 to 10 percent. Almost all of these are small parties running their own candidacies without another party to back them. 22 of the 183 candidates failed to even pull one percent of the vote. 18 of them ran in 2015, 2016 or 2017, which is explained by the sample including many candidates from parties that were new in 2015. Encuentro Social had five gubernatorial candidates that failed to win one percent. The 15 non-coalition candidates they have nominated since 2015, such as Guadalupe Ramona Rocha Corrales in Sinaloa (2016), averaged 1.6 percent of the vote; excluding Marco Antonio Flores Sánchez in Zacatecas, who pulled 8 percent, this average drops to just above 1 percent. The now-defunct Partido Humanista had four, and Morena had two. Movimiento Ciudadano also had four extremely ill-fated candidacies.

Only two small parties in the restricted sample have a positive party-level DVS, Movimiento Ciudadano in Guerrero and Morena in Baja California Sur, both in 2015 and both very close to zero. In fact, every other party that polled less than 15% in the gubernatorial race performed better in the election for PR deputies. Conversely, most of the 19 larger parties performed better in the gubernatorial race, and all but one of the larger parties in concurrent elections performed better—the exception, of course, being the PRI in Michoacán in 2015.

This disparity suggests that even when voters choose their deputies and governors at the same time, they vote strategically for a gubernatorial candidacy likely to attract a larger percentage of voters. Strategic voting presents a source of variation even in concurrent election cycles between the PR election for federal deputies and the winner-

take-all gubernatorial contest. Votes consistently flow “upward”, as it were, from parties with no shot at winning to viable gubernatorial candidates.

Sea change. Sea change, as mentioned earlier, seems to require the passage of time.

Again excluding Nuevo León in 2015, all of the cases of party DVS of -10 percent or lower were in nonconcurrent elections. All but one of them were attributable to PRI coalition candidates in 2016 and 2017. The PRI lost six of the eight races, with the highlight being Manuel Riquelme Solís of Coahuila, who managed to survive an 18-percentage-point drop-off and win his race in 2017.

CHAPTER 6

DISCUSSION

This thesis has found that the move to concurrent gubernatorial elections by Mexican states generally brings them the benefits enjoyed by those states already having concurrent elections. Not only does midterm concurrence offer a tighter fit to federal results, but it also results in a boost to turnout experienced more from the federal side than the state side—a significant finding considering that states generally preferred to move to the midterm.

Two directions of state and federal interaction appear to exist. The tight fit of results in midterm concurrence and the impressive increases in turnout for federal elections concurrent with state races suggest that, when midterm concurrence is chosen, federal politics becomes state-sized while state politics drives turnout. However, presidential concurrence appears to do the opposite, federalizing the contours of state politics.

Limitations of the Research Program

Various features of the Mexican political system, as well as the time period being studied, present potential limitations to this type of research.

Lack of federal equivalents. The comparison to federal deputy results requires that successful gubernatorial candidates map to some extent to a national party or parties.

While most state parties draw very little support when they strike it alone, and many of the independent candidacies run so far in the states have failed to draw more than a few percent of the vote. One potential source of post-concurrence variation after the reforms of 2014 is the legalization of independent candidacies. Because independent (and state

party-exclusive) candidacies for governor do not correspond to one of the national political parties, they necessarily increase deviation in vote share when compared to the PR deputy elections, in which state parties and independent candidates are not present. The state-level Partido de los Pobres de Guerrero mounted a gubernatorial bid in 2015 that surpassed each of the two smallest national political parties, which ran alone. The average deviation in vote share for the Nuevo León gubernatorial and deputy elections in 2015 is the second-highest in the extended sample, even though they were concurrent, because independent Jaime Rodríguez Calderón (El Bronco) ran away with nearly half the vote in the race for governor, and all of the party-level DVS indicators are signed negative.

Violence. With states like Guerrero and Michoacán in the sample, and given the general situation of insecurity that has faced Mexico since 2007, another potential source of variation is the level of violence in the state. The Institute for Economics and Peace (IEP) produces an annual peace index covering the Mexican states, the Mexico Peace Index. Figure 9 compares the annual figures as presented in the 2017 report for each state in the years covered here. A lower number means more peace in the state:

Table 12. Mexico Peace Index for Restricted Sample States

	Nonconcurrent	Concurrent
Yucatán	1.51	1.38
Baja California Sur	1.99	2.66
Guerrero	3.79	3.80
Michoacán	2.26	2.07

Source: Mexico Peace Index Annual Report 2017, Institute for Economics and Peace

Three of the states covered here had their concurrent elections in 2011, which also was the year with the second-worst national-level peace index (2.63). The national index declined to 2.17 in 2015, but the states in question lagged the nation in improvement. Michoacán saw a small drop, while Guerrero was essentially flat. Baja California Sur's surge in violence was reflected in the stunning .67-point rise in the state's peace index over four years. That was the largest increase by any state between 2011 and 2015.

Strategic and split-ticket voting. Variation can also occur from deliberate splitting of the vote by individuals for a reason the congruence literature emerged to tackle in countries like Canada: the creation of separate state and federal political arenas. In a country like Mexico, where state parties are very small, this is not likely to come from state parties or markers of regional identity.

Regional political performance plays a recognizable role in the highest party-level DVS case in a concurrent election in the expanded sample. Enrique Alfaro Ramírez, the Movimiento Ciudadano candidate in Jalisco in 2012, caused quite a bit of citizen movement; he outpaced his party's deputies by a full 21 percentage points and finished a close second in the gubernatorial race. Jalisco is the party's "orange bastion", as it were; three years later, it outpaced the PRI in total votes in the state and tied the PRI for the most seats in the new state legislature.

Presidential Concurrence and Coalitions?

It should be evident that the four cases analyzed in this paper are only a taste of what is to come. Not only are two states shedding their *gubernaturas cortas* in 2018, but in 2021, another six states will have gubernatorial elections concur with the federal

midterm elections for the first time—doubling at one stroke the number of states that have moved into a new electoral cohort in recent years.

With two-thirds (or more) of the eventual universe of cases missing, it is difficult to test all of the hypotheses made at this time, either because of changes in data collection and electoral organization, or because there are not yet enough examples. One hypothesis that might have been testable if only there were more cases available deals with the unique environment created by presidential concurrence.

When a state gubernatorial election is not held concurrently with other races, or concurrently with mayoral and local legislative contests, it attracts the most media attention and sets the tone for the other races. Since coalitions are not used for proportional representation seats, including at midterm legislative elections, state elections that are moved to midterm years can still dominate other races.

The same cannot be said when it comes to a gubernatorial election in a presidential year. The presidential election absorbs time, media attention, and party priorities. Gubernatorial elections play second-fiddle, even in the minds of state voters. Presidential elections are typically contested by multiple coalitions of parties, so for a federal political party, aligning with a different party or parties at the state level compared to an existing national-level coalition, especially in a gubernatorial year, presents the risk of serious inconsistencies, voter confusion, and tension between the state and national party organizations. Even when there is no governor in play, this pressure is strong. In Michoacán in 2018, the Partido Verde (PVEM), which is entering into coalition with the Institutional Revolutionary Party (PRI) for the presidential elections, went into a shocking electoral coalition with the National Action Party (PAN), Party of the

Democratic Revolution (PRD), and Movimiento Ciudadano (MC)—all of which are backing another presidential candidate. The response from the national PAN organization was to order the state party to undo the coalition, saying it was not authorized by the national organization, even though the state parties went ahead anyway. Speaking about reports of negotiations over a similar alliance in Mexico City, a PAN spokesperson said that “national leadership has said that we don’t want alliances with PRI allies, such as the Partido Verde.”

In 2012, there were four coalitions/groups for the presidential elections. Two parties ran alone, PAN and Nueva Alianza (PANAL). The PRD, PT, and MC entered into coalition, as did the PRI and PVEM. Table 13 graphically shows the coalitions of federal parties that contested the state gubernatorial elections of 2012 (including the Mexico City mayoral election):

Table 13. National and Local Electoral Coalitions in States with Concurrent Gubernatorial Elections, 2012

National	PAN	PANAL	PRI	PVEM	PRD	MC	PT
Chiapas	PAN	PANAL	PRI	PVEM	PRD	MC	PT
Distrito Federal	PAN	PANAL	PRI	PVEM	PRD	MC	PT
Guanajuato	PAN	PANAL	PRI	PVEM	PRD	MC	PT
Jalisco	PAN	PANAL	PRI	PVEM	PRD	MC	
Morelos	PAN	PANAL	PRI	PVEM	PRD	MC	PT
Tabasco	PAN	PANAL	PRI	PVEM	PRD	MC	PT
Yucatán	PAN	PANAL	PRI	PVEM	PRD	MC	PT

The PRI and PVEM ran together in all seven of the gubernatorial elections. In five states, the PRD, PT and MC ran together; in Guanajuato, they fielded separate candidates, and only the PRD and MC put up candidates (on their own) for governor of Jalisco. Nueva

Alianza, one of the smaller parties, only ran its own candidate in three states, piggybacking on the PRI-PVEM coalition in another three and aligning with the PAN in Guanajuato.

It is hard to see, however, if this is common behavior for parties because all but one of these states had conducted concurrent elections in the past. Only in Yucatán was the previous election not held concurrently, though in that state, coalition building did turn out identical to the national panorama in 2012 when it had not been in 2007.

Another potential reason for differentiated behavior unique to a presidential election is a coattail effect. Borges and Lloyd (2016) look at Brazil, where all gubernatorial elections have presidential concurrence, and argue that the primacy of national party success forces parties to mobilize local constituencies and coordinate local candidates. The result is an incentive structure that favors integration of local and national party systems (less of a salient issue in Mexico, where the major parties are all national) and multi-level integration within parties. According to this narrative, the national party receives the benefit of additional votes for its candidates, while the state party benefits from associating its local candidates with a popular presidential candidate and using national party cues to draw voters' attention to their offerings in the local races.

The 2018 Election and Gubernatorial Coalitions

Three presidential coalitions will contest the 2018 elections. The PRI, PVEM and PANAL have united to form Todos por México; Por México al Frente consists of the PAN, PRD and Movimiento Ciudadano; and Morena, the PT and the PES joined forces under the banner Juntos Haremos Historia.

For the state gubernatorial elections in 2018's newly concurrent states, Puebla and Veracruz, to reflect these three alliances, old configurations will have to be broken. In 2016, the winning gubernatorial bid in Puebla consisted of three national parties, one from each of the 2018 presidential coalitions: PAN, PT, and PANAL. In Veracruz, meanwhile, each of the parties in the Juntos Haremos Historia coalition ran their own candidate, and Movimiento Ciudadano went it alone.

If state elections become more second-order affairs in presidential years, then state gubernatorial coalitions should be expected to be identical to or closely resemble the presidential coalitions forged for the same year, perhaps with some exceptions for smaller parties, because it is a national party imperative to ensure as much consistency as possible in terms of electoral coalitions. The Veracruz and Puebla cases will eventually demonstrate if existing state-level ties are stronger than national presidential coalitions, even in some of the largest states in the country.

Another category of election that becomes second-order, particularly in presidential years, includes the national legislative races. Shugart (1995) finds that when presidential and legislative elections are concurrent, opposition majorities are less common, and when they are not, the likelihood of an opposition majority forming increases as the presidential term progresses. The implication is that, in states with a +0 electoral cohort, state elections take on a second-order quality; this is true not just of the intriguing concurrence cases of Yucatán, Veracruz and Puebla, but also of the other state elections in the cohort.

A potential mitigating factor for the creation of an order effect is split-ticket voting. According to Espinoza Valle (2009), the proof that this type of voting behavior is

on the rise can be seen in the 2006 election, in which PRI presidential candidate Roberto Madrazo failed to carry a single state but PRI deputies and senators were still elected. However, such a characterization is faulty given the circumstances. In a presidential election in particular, Duverger’s Law suggests some level of convergence will occur toward two candidates, and in 2006, PRI voters may have been motivated to vote strategically for either Felipe Calderón or Andrés Manuel López Obrador, as it was clear before the election that the PRI candidate had no shot at winning. For instance, polling one month before the election showed Calderón and López Obrador tied, with Madrazo a distant third and ten percentage points behind.

The implications of Shugart’s findings for the bulk of the states, those in or aligning to +3, are less clear, and the last two midterm elections do not offer much of an opportunity to find the answer, as shown in Table 14:

Table 14. Electoral Results of the 2009 and 2015 Midterm Elections

Election	Opposition Party	Chamber of Deputies Seats Won	Governors Won
2009	PRI	237	5 of 6
2015	PAN	109	2 of 9

In the 2009 elections, the PRI returned to its usual place as the largest political party in the Chamber of Deputies and also won five of the six gubernatorial contests that were held. This, however, is rather deceiving and reminds us of the continued dominance of PRI politics in some states. While two of the states were pickups from the PAN, the PRI were the incumbents in the other three, and in the case of Campeche and Colima, there has never been *alternancia*—a non-PRI governor—in the modern era.

In 2015, however, the expected direction of results did not occur. The PAN only wound up with 109 seats, nearly half of them by way of proportional representation. In fact, the PRI carried 159 of the 300 electoral districts nationwide and was able to form a majority with the PVEM. Additionally, the party only managed to win two of the nine gubernatorial races that year, in Baja California Sur and Querétaro. The PRD-led candidacy won in Michoacán, while the PRI flipped Sonora (from the PAN) and Guerrero (from the PRD) and kept San Luis Potosí, Campeche and Colima; an independent, Jaime Rodríguez Calderón, made history in Nuevo León. However, the high negative party DVS levels of PRI gubernatorial candidates in 2016 and 2017 suggest that the PRI did lose significant ground, at least in some states, after the midterms.

While midterms present no consistent picture, given the dynamics of presidential elections—extensive media attention, a shower of commercials, and the prioritization of national electoral alliances by parties that must also approve state coalitions—they are likely to prompt gubernatorial races that happen to coincide to fall in line and adopt the same coalitions.

Voters in Veracruz in 2018 will see three coalitions that broadly look like the federal ones. “Por Veracruz al Frente”, as its name suggests, consists of the PAN, PRD and Movimiento Ciudadano. “Por un Veracruz Mejor” includes the PRI and PVEM, but not Nueva Alianza. “Juntos Haremos Historia”, using the same name as its national counterpart, consists of Morena and the PT and PES. The primary effect will be to consolidate what was a fairly crowded field from six candidates to a more manageable four (and any independents that show up). The Juntos Haremos Historia member parties all ran their own candidates two years ago, and Movimiento Ciudadano went it alone,

while Nueva Alianza was part of the PRI's Veracruz coalition in 2016. Indeed, only Nueva Alianza's going it alone differentiates Veracruz's electoral configuration in 2018 from the national panorama.

The Puebla gubernatorial coalition of 2016 is especially noteworthy in the 2018 context, and it would not have been likely to stick around and run again. In fact, the three federal parties in the coalition are each backing separate presidential candidates this year. From the perspective of Hypothesis 3, it's no surprise, then, that the PAN-based coalition looks very different. "Por Puebla al Frente" mirrors the national coalition, with the PAN, PRD and Movimiento Ciudadano (which did not support a candidate last time around), as well as the state-level CPP and PSI parties that supported the PAN candidacy two years ago. "Juntos Haremos Historia" will also run in Puebla with the same composition as the national coalition, down to the proportion of its candidacies each party gets.

As for the partners in Todos por México, which seems to have the least consistency of any of the national coalitions, they were in quite the mess. In December, the man who would become the PRI's gubernatorial candidate in the state warned that the PRI's lack of commitment to an alliance in Puebla was a "very bad sign" for the state party's chances and that not entering into a coalition would run the risk of generating voter confusion. The party attempted to force its national coalition partners, whose state party chiefs have insisted on going it alone, into backing the PRI bid. This, however, failed, and by March, the Partido Verde and Nueva Alianza had registered their own gubernatorial candidates. For the PVEM, 2018 is the first year since 2009 in which it will run its own gubernatorial candidate any state.

All in all, the effects of presidential-year concurrence on gubernatorial races seem to solidify the battle lines and make alignments that cross national coalition lines unsustainable and extremely undesirable from the point of view of the national party organization. However, smaller parties do not always fall in line and sometimes run their own candidates.

The 2018 campaign of Andrés Manuel López Obrador offers a prime opportunity to see if federalization of state politics in presidential years holds sway in the nine states electing governors. Morena, a party established just four short years ago, has never held a state governorship, yet AMLO is leading in the national polls. An *Animal Político* analysis from early April designates the Morena-PT-PES gubernatorial bid competitive in eight of nine states, with Yucatán, a state where the left is consistently weak, an exception. If Morena takes most of these states, including newly concurrent Puebla and Veracruz, it will offer strong evidence for this position.

Beyond 2018 and 2021

The dramatic shift in the distribution of Mexican gubernatorial elections does not end with the changes coming for the next cohort, either, because Tamaulipas, Aguascalientes and Quintana Roo all have moves in the works. By 2027, 15 states will have moved their gubernatorial elections into new cohorts in the span of 15 years. Four of them will have experienced the odd sight of a two-year *gubernatura corta* in the land of *sexenios*. While for many of them, the reason why is clear to see in the Constitution, it will take time to better understand the benefits of the move for states and their electorates. It is not inconceivable that some or all of the five states that have taken no

action with regard to their gubernatorial races—Durango, Hidalgo, Oaxaca, Coahuila and the State of Mexico—will join them down the road, whether due to further centralization of the electoral system (a federal mandate, like the 2014 constitutional reform) or decisions made at the state level.

The political-electoral reform of February 10, 2014, may end up simply being another stepping stone on the road to a fully centralized electoral administration in Mexico. However, it has left an indelible watermark on the rhythms of state politics across the country, rhythms that until now had been undisturbed for as many as 70 years.

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APPENDIX A

ARTICLE 116, SECTION IV, CLAUSE N, MEXICAN CONSTITUTION

De conformidad con las bases establecidas en esta Constitución y las leyes generales en la materia, las Constituciones y leyes de los Estados en materia electoral, garantizarán que ... se verifique, al menos, una elección local en la misma fecha en que tenga lugar alguna de las elecciones federales.

APPENDIX B

DATASET OF CANDIDATE-DEPUTY COMPARISONS, 2007-2017

[Consult Attached Files]

APPENDIX C

DATASET OF ELECTORAL DISSIMILARITY SCORES, 2007-2017

[Consult Attached Files]

FIGURES

Figure 1. Change in DIS in Restricted Sample States

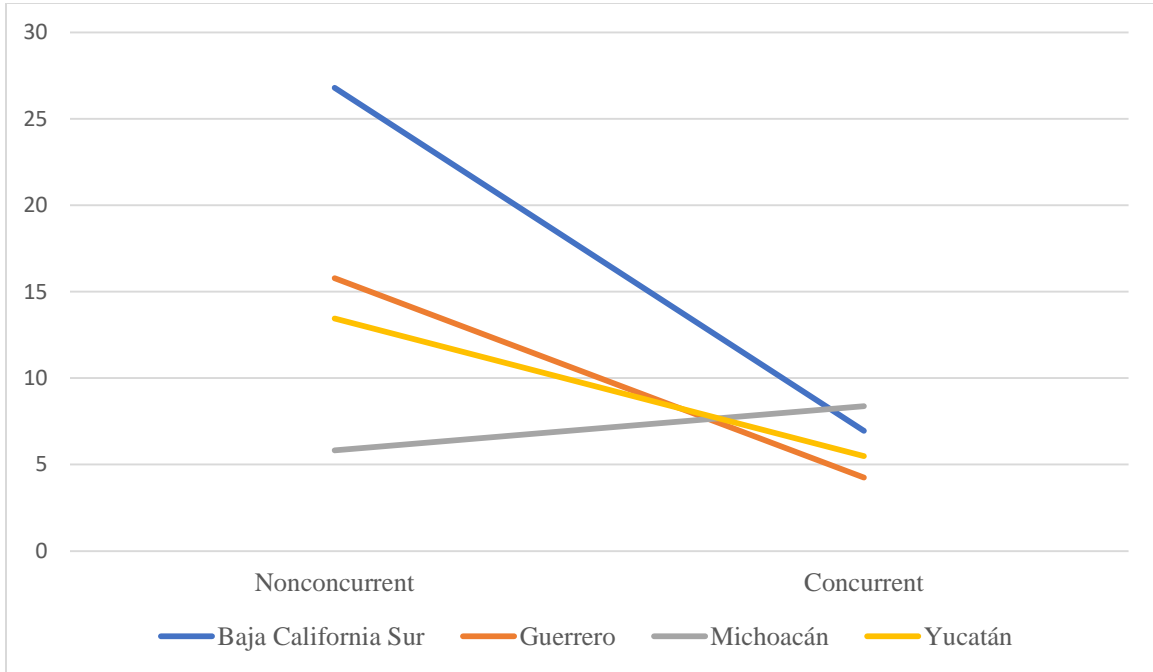


Figure 2. Comparison of DIS in Nonconcurrent/Concurrent Elections and Across Types of Concurrence, Expanded Sample

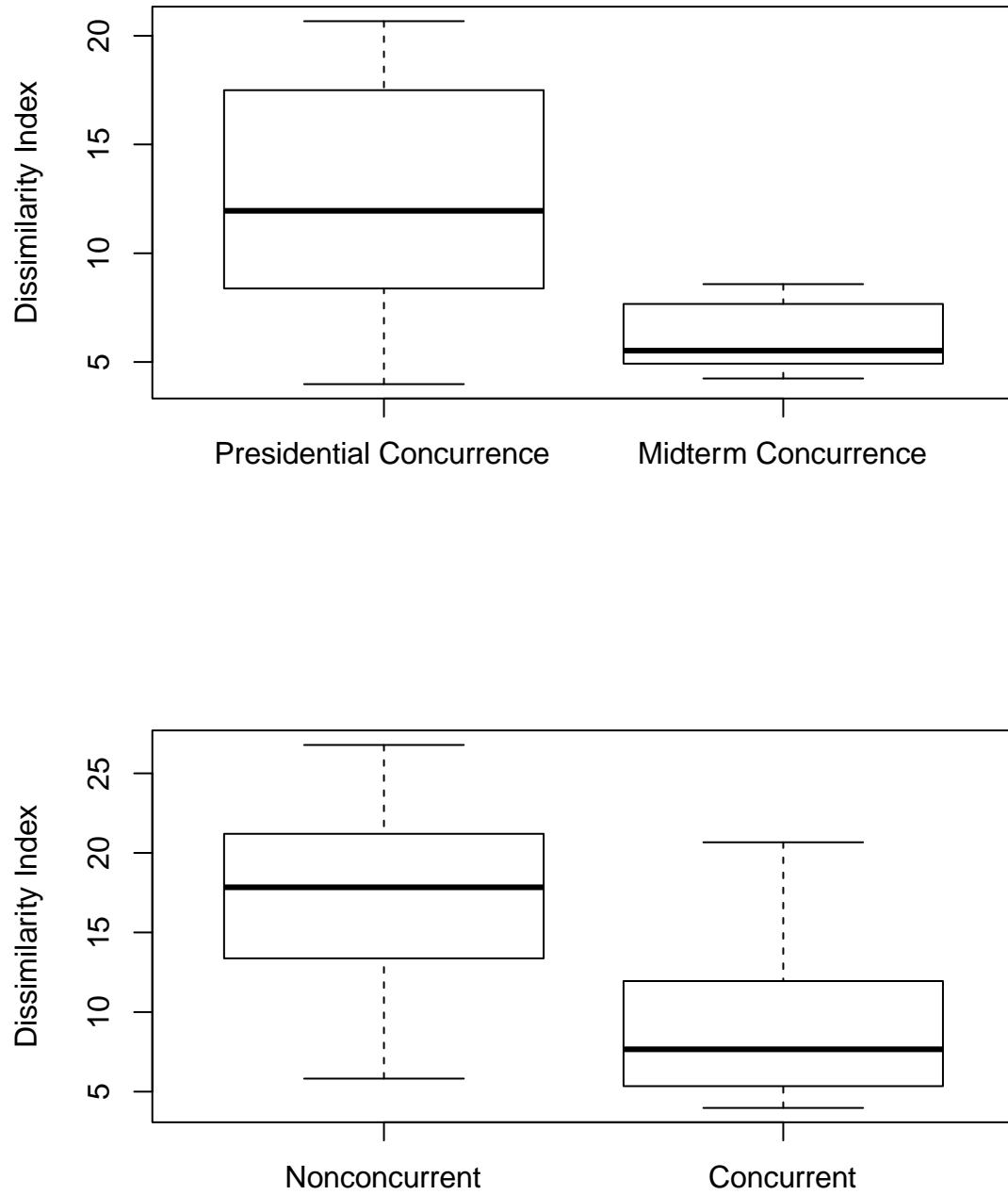


Figure 3. Party-Level DVS versus Gubernatorial Vote Share for the Expanded Sample

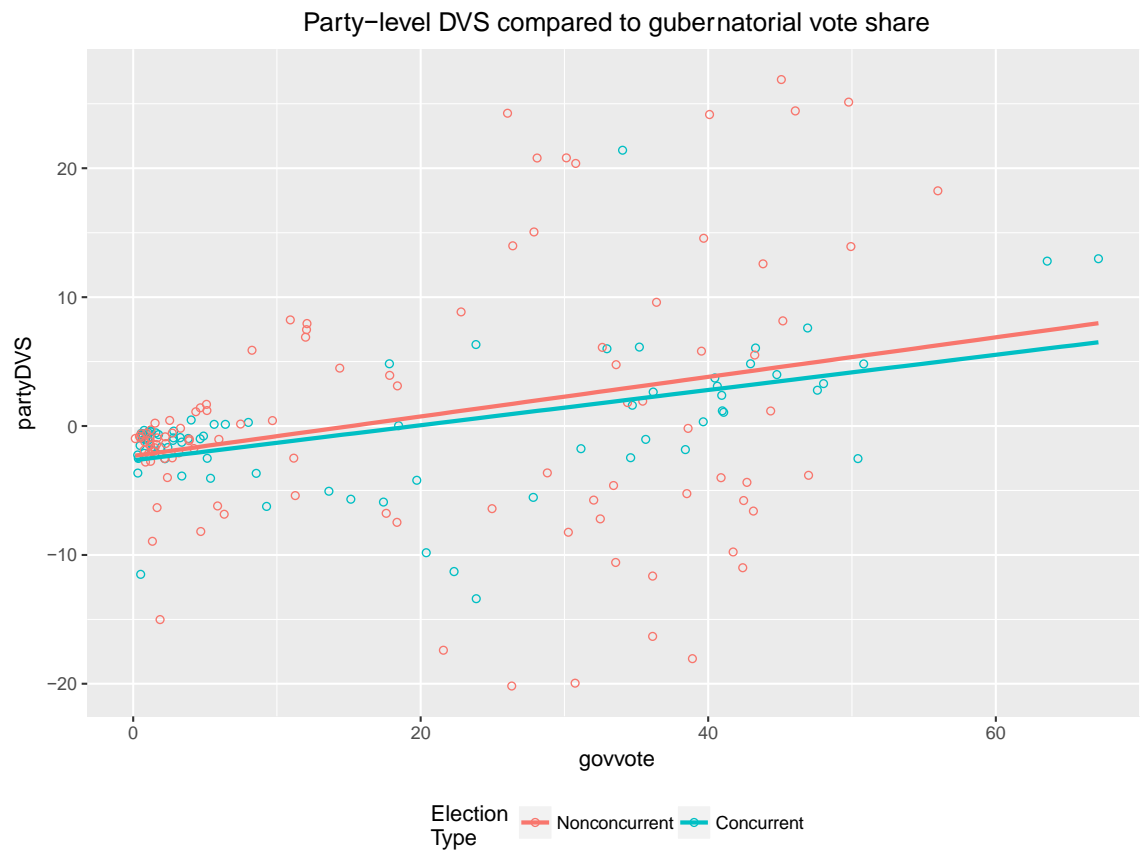


Figure 4. Party-Level DVS versus Gubernatorial Vote Share for the Restricted Sample

