As Mexico Votes, What Next for Crime and U.S. Ties?

Mexican voters go to the polls on 2 June to elect a new president. In this Q&A, Crisis Group expert Falko Ernst explains who is likely to win, the security challenges she will face, and what the result might mean for U.S.-Mexican ties.

What is at stake in Mexico's elections and which candidates are well placed to win?

On 2 June, Mexico will hold its largewst ever elections: 20,708 posts at all levels of government are up for grabs, including the country's highest office. Polls indicate the likely victor in the presidential poll will be the ruling Movement for National Regeneration (MORENA) candidate, former Mexico City mayor Claudia Sheinbaum, a trained physicist and the protégée of current President Andrés Manuel López Obrador. At the time of writing, she maintained a 22 per cent lead over her main competitor Xóchitl Gálvez in an average of the most recent opinion polls. Gálvez is a former senator running as the candidate for an eclectic alliance made up of her own centre-right National Action Party (PAN); the once dominant Institutional Revolutionary Party (PRI); and the centre-left Party of the Democratic Revolution (PRD). In all likelihood, this will be the first time Mexico elects a female president. A third candidate, Jorge Álvarez Máynez of the centre-left Citizens' Movement, trails well behind, with around 10 per cent of the vote. If the polls prove correct, it will also be the first time this overwhelmingly Catholic country elects a head of government of Jewish origin.

When Gálvez, known for speaking her mind, announced her candidacy last June, she appeared to spark life into a race that many saw as having a preordained winner. But voter preferences have barely moved in her favour since then. Mexico's opposition remains saddled with a major credibility problem. Previous governments led by the PAN and the PRI, which ruled Mexico as a single party for 70 years until 2000 and again from 2012 to 2018, have been tainted by accusations of graft and suffered a loss of public confidence due to ill-conceived security policies that were unable to curb Mexico's sky-high violence. Indeed, those approaches often increased insecurity. Despite Gálvez's best efforts, the opposition has yet to establish itself as a competitive force outside certain regions.

Why is the ruling party so popular?

MORENA is riding high in the polls: 50 per cent of voters say they will cast their ballot for the ruling party or one of its junior partners, the Green and the Labor Parties. This is in no small measure due to the seemingly unbreakable popular appeal of its founder and charismatic

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leader, outgoing President Andrés Manuel López Obrador, widely known as AMLO. Riding on the wave of "AMLOvers" and lauding the president's achievements, Sheinbaum has pledged to take the current government's efforts to "the next level".

MORENA claims to be the exact opposite of everything wrong with Mexico until it took power in 2018 – whether corruption, inequality, neo-liberalism or a self-serving and venal establishment. During long press conferences held every morning from Monday to Friday, López Obrador tirelessly made the case for what he has termed Mexico's "Fourth Transformation", a process of social and ethical regeneration that builds on three earlier periods of radical change in the 19th and 20th century.

Arguably the centrepiece of his administration has been welfare provision for people in lower income brackets. Record spending on social programs included a 444 per cent increase from 2018 to 2022 in pensions for the elderly. These and other direct subsidies are now reported to reach more than a third of the population. Together with a doubling of the minimum wage, from 2018 to 2024, such measures have contributed to a reduction in moderate poverty rates of around 6 per cent. (By contrast, rates of destitution have slightly increased, with the poorest households now receiving fewer cash transfers than under the previous administration). MORENA candidates have suggested in campaign events that the continuation of these state supports hinges on the party's victory. That message appears to have gained purchase with the public: according to one poll, 37 per cent of voters believe a change of government will lead to an elimination or reduction in these subsidies.

With the exception of the first year of the pandemic, the Mexican economy has been buoyant during López Obrador's term in office, which has helped him make progress on his poverty-reduction goals. Remittances

from abroad have reached record highs and the national currency, the peso, has remained strong in international financial markets. Mexico also benefits from the current trend toward near-shoring – the process whereby industries move their production sites closer to their markets – and has made the country an increasingly important hub for global trade, particularly with the U.S. Indeed, last year Mexico ran up a $152 billion trade surplus with the U.S.

Yet not all is as rosy as government officials would have it. López Obrador argues that he has ousted the "power mafia", a reference to former political establishment that became known for pulling the strings of state for their own benefit. Critics have noted, however, that many former members of the PAN, PRI, and other parties have found a new home in MORENA, undermining claims that a new way of doing politics has emerged. Accusations of corruption have also not ebbed. But the president has tended to dismiss any whiff of criticism as thinly veiled attacks by foes in the media and opposition fearing their loss of privilege.

Perhaps the government's weakest flank is security. Although the recorded murder rate has begun to drop, more than 185,000 homicides have been registered under López Obrador – a new record for a presidential term – and violence involving heavily-armed criminal groups continues to rage in regions such as Zacatecas, Baja California, Colima and Michoacán. Official assertions that there now is "peace and tranquillity" across the country are simply discordant with reality. Although the distribution of violence is uneven – 42 per cent of all murders are concentrated in just ten out of 32 states – security remains one of Mexicans' top concerns.

Another highly controversial aspect of López Obrador's government is its erosion of democratic checks and balances. He has accused the courts as well as autonomous oversight bodies

A Wixarika Indigenous woman casts her vote at an elementary school during a mock election day drill as part of the training given by officials of the INE ahead of the June 2 elections in Tuxpan de Bolaños, Jalisco State, Mexico, on May 18, 2024. ULISES RUIZ / AE / AFP

such as the National Electoral Institute – which is in charge of organising elections – of corruption and partisan behaviour. At the same time, he has largely handed public security, as well as a growing list of responsibilities that used to lie under civilian control, to the armed forces. As discussed in Crisis Group's recent report, López Obrador, however, has not stepped up oversight of the armed forces in tandem. Accusations that the military has colluded with criminal groups, committed human rights violations, and engaged in graft have piled up without being properly investigated.

Critical voices, domestic and international alike, have warned that Mexico is undergoing serious democratic backsliding. Recent polls show falling support for democracy (now at 35 per cent, down from 43 per cent the year before) and greater public acceptance of both the military's prominence and authoritarian rule (33 per cent as compared to 22 per cent

in 2022). But even if the next president seeks to concentrate power further in her hands, the leeway to do so will likely be limited. While MORENA appears likely to retain the presidency, it is unlikely the party will garner the two-thirds majorities in both chambers of Congress it would need to push through the constitutional amendments that would be required to dismantle autonomous oversight bodies.

Why have elections in Mexico become so violent?

Since turning the leaf on single party rule, the country has held nominally free elections. But law-abiding citizens and interest groups are not the only ones deciding who occupies office and to whom they answer. While organised crime grew under the protective wing of the PRI during the party's decades-long authoritarian governance, Mexico's criminal groups have also adapted to and thrived in democracy. Indeed,

at this point, these outfits have successfully wrested too much control over state and security institutions.

Gaining a foothold in the state has become essential to criminal groups' survival and growth. It brings impunity, crucial intelligence, and operational benefits including on occasion direct support from security forces. These illicit links can also generate new sources of income by allowing criminal organisations to tap into public contracts and payrolls. Over years of interviews with Crisis Group, criminal operatives and brokers have repeatedly highlighted the singular importance of striking favourable arrangements with security forces and elected officials. Failure to do so increases the threat that rival outfits will edge them out. The victims of this competition tend to be those caught in the middle, especially political candidates, state officials and police at the local level, where competition between criminal power and the state is at its most brazen. A total of 32 candidates have so far been killed in the run-up to the June polls, making them the most lethal in modern Mexican history.

The high tide of murder victims in some precincts around election periods reflects criminal groups' tightening grip. With greater sway over civilian populations, these groups now have at their disposal the means to play the electoral game. They can, for example, contribute blocks of votes to selected candidates from areas under their influence: on and before polling day, locals are persuaded, or told at gunpoint, who to vote for. Sometimes they commit blatant electoral fraud by filling in ballots. They also intimidate politicians who do not bend to their will and funnel illicit campaign donations to their preferred contenders. The quid pro quo criminal groups expect from an elected candidate in return is a say over their future decisions.

What's next for security policy in Mexico?
Mexico's security challenges have grown more daunting over the past six years. López Obrador initially formulated a holistic strategy to curb criminal power, encompassing a dedicated fight against corruption and an effort to address the socio-economic conditions that led some of Mexico's poorest citizens to join criminal groups. Promising "hugs, not bullets", he vowed to distance his government from the security approaches of past governments. But over time he has opted for a different route, and relied upon the armed forces to an extent not seen before in recent Mexican history. After creating an entirely new security force, the National Guard, López Obrador has deployed close to 300,000 soldiers to Mexican streets. Even so, few efforts have been made to unwind criminal networks. Crisis Group research indicates that in areas such as Michoacán, Colima, and Guerrero, illegal outfits have intensified their control over local economies, populations, and politics, making criminal power today a tougher nut to crack than ever. In many of these communities, local law enforcement has come to tacit agreements with the criminal organisations: state forces look the other way in exchange for a reduction in overt violence.

Gálvez and Sheinbaum disagree on the extent of the problem, but both have pointed to ways in which they would recast security policy. Gálvez is running on a vow to end what she regards as a dangerous appeasement strategy in dealing with crime. Sheinbaum has been treading carefully so as not to criticise overtly the outgoing government. Praising its reported success in reducing the murder rate, she has pledged to stay true to course. But reading between the lines of her security proposals, and in conversation with the decidedly more technocratic team behind a drop in homicides in Mexico City during her time as mayor, a rather more critical assessment of current policy and how it should change emerges.

Both candidates suggest that security forces are stretched too thin to meet the huge demand placed upon them and the threats posed by over 200 active criminal groups across the country. Their assessment is an accurate one. The impunity rate for serious crimes hovers around 95 per cent; analysts have calculated that even if dozens of fresh cases weren't added on a

daily basis, the backlog in homicide investigations would take over 100 years to clear. As a result, the two candidates sensibly argue that law enforcement resources should be concentrated in the most violent, crime-ridden parts of the country, and that it is crucial to strengthen coordination between layers and institutions of government. They also want to hit illicit networks where it most hurts their operational capacities: tracking finances, curbing corruption through tighter oversight, and drying up the flow of guns and ammunition into Mexico as well as their main sources of lucre, including synthetic drugs and extortion.

On paper, these are promising steps but the question is whether they will be implemented. Ever since former president Felipe Calderón's heavy-handed approach to the "war on drugs" ended in failure, politicians' zeal to improve public security has chilled notably. Most decision makers have instead opted for the blame game, with the federal government often accusing past administrations, the U.S., or state governors for high crime rates. As one high-level security official told Crisis Group, there is a generally resigned stance in the corridors of power. High-conflict areas such as Guerrero and Michoacán are deemed "unfixable" – and thus better approached as a public relations conundrum rather than a policy problem.

Can Mexico and the U.S. work together to confront insecurity?

Mexico's future security policy may hinge on the stance taken by the U.S., particularly if the November election sees the return of Donald Trump to the White House. Senior Republicans have rattled sabres over the huge number of yearly drug overdose deaths in the U.S., which now stand in excess of 100,000 and are mostly related to imports of the synthetic opioid fentanyl via the U.S. southern border. Resentment also runs high in Republican circles over Mexico's alleged failure to halt migrant flows to the U.S. border, even though the country has been acting as a buffer to those in transit north for years. These various concerns have coalesced into growing demands to attack Mexican crime groups directly. Notably, Trump and some Republican members of Congress have floated the possibility of deploying the U.S. military on Mexican soil to take out criminals and bomb their facilities – with or without Mexican approval.

For the United States to use military force in Mexico without its permission could create a state of war between the two neighbours and be enormously destabilising. That said, the U.S. would struggle to steamroll Mexico into submission. The country holds potent leverage in areas beyond security: migration control, energy and trade stand out (Mexico is now the biggest U.S. trade partner). Both countries' fates are intimately intertwined. Barring a meltdown in the relationship – an outcome that would do serious harm to U.S. national interests – the real question is whether U.S.-Mexico security cooperation will evolve, and in what direction.

Criminal leaders, military officers and elected officials in high conflict areas are often adamant in their interviews with Crisis Group that a U.S-imposed, ham-fisted law and order approach will not work. Previous Mexican governments have tried such tactics to take out criminal leaders and they have proven a policy failure. The militarised kingpin strategy, which aimed to kill or capture high profile crime bosses during the heights of the "war on drugs", is one example. Notably, the policy backfired: Criminal organisations splintered, triggering new battles for territorial control

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which destabilised Mexico and cost hundreds of thousands of lives. Even so, Mexico's next president may well have to navigate insistent demands from Washington either to go on a more offensive footing against crime groups or allow the U.S. to take charge.

In the meantime, in some areas alternative approaches to get violence down by any means are being explored. In Chiapas, landowners are buying guns to defend themselves. In the State of Mexico, small-scale entrepreneurs and other targets of criminal abuse discuss how to organise some form of self-defence. In Guerrero, clerics are brokering deals between opposing criminal bands. In Michoacán, an unlikely alliance of crime leaders and high-ranking officials argue that the state should act as an arbiter of criminal affairs. "We need to sit all the groups down and tell them what the rules are", one member of federal parliament told Crisis Group. Swinging the stick of military force at the same time, he hopes, could help demarcate criminal territories, curb fighting and reduce predation.

There is no certainty any of these ideas will bear fruit. Even so, they form part of an emerging pragmatism in Mexican security thinking that appears to be clashing head-on with growing U.S. hawkishness. At the top of the U.S. wish list is stopping the arrival of the devastating narcotic fentanyl. In Mexico, stopping drugs trafficking is becoming more and more of an afterthought.

That said, even some of the loudest promoters among U.S. lawmakers of a tough-on-Mexico approach have conceded to Crisis Group, behind closed doors, that the quick fix solution they are eager to identify is likely to remain elusive. Instead, they are thinking about how to get better at sending "messages" to what they consider the most problematic crime groups. These deliberations intersect with the way in which the Sheinbaum security team, which is likely to take office in October, are looking at the wproblem. It, too, is considering establishing a hierarchy of the most harmful outfits. Singling these out as priority targets, including by aiming to interrupt their financing through better intelligence work and arrests of key nodes in their networks, they hope, could convey to the criminal population at large that certain illegal practices will no longer go unanswered. Despite the electoral noise in the U.S., similarities in strategic thinking on both sides of the border could create the space for the two countries to find ways to work together. ■